

ADVANTAGE SOLUTIONS



For Association Professionals And Volunteers



THE ORGANIZATIONAL ASSESSMENT—TAKING STOCK AND GUIDING ACTION *By Barton Tretheway and Phil Lesser PhD, CAE*

Successful staff and volunteer leaders recognize that conducting a periodic organizational assessment is part of good governance and a sign of a healthy organization. An organizational assessment answers the important questions of What’s working well? and What could be working better? The answers to these questions support an informed organization poised to move forward with operational efficiency and relevant service to its constituents.

Custom Fit

Generally, an organizational assessment is a planned and systematic review of an organization’s environment, operations, structure, and processes. Its purpose is to enhance the efficiency and effectiveness of the organization in meeting its particular goals. To this end, typical objectives of an organizational assessment include:

- > Identify and prioritize organizational improvement areas
- > Benchmark the organization against best industry practices
- > Determine member needs and satisfaction levels
- > Gauge staff capabilities and competencies

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GUIDE TO GREENING YOUR ASSOCIATION *By Jeanne Sheehy*

Many of you may remember the 1970s when the environment became a youth-driven cause complete with folk songs and ecology buttons. Since its beginnings decades ago, the green movement has gone from a grassroots initiative to mainstream practice to mandatory policy in some locales. State and local governments are adopting recycling laws, and accrediting agencies like the Council on Accreditation have incorporated green programs as a scoring standard. An association’s green program demonstrates not only good corporate citizenship; it also presents a forward-thinking organization to members.

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THE RIGHT TIME FOR AN ORGANIZATIONAL ASSESSMENT

By Ken Monroe



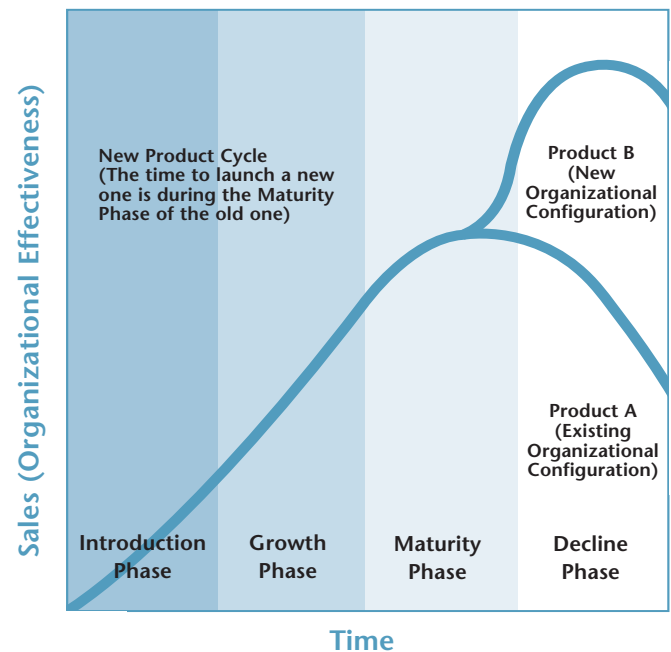
The organizational assessment has fast become a best practice for strengthening an association's strategic and operational activities. In an earlier SOLUTIONS article*, I defined the organizational assessment as a planned systematic review of an organization's environment, operations, structure, and processes with the purpose of enhancing the organization's ability to meet its goals and objectives for providing maximum value to its members. I also described the elements association leaders need to consider in planning an organizational assessment, such as scope, team approach, audience, staff, research, and data collection. Barton Tretheway and Phil Lesser, in an article on page one of this issue, expand the topic with a description of organizational assessment objectives and process. Here, I address the critical question of timing—When should an association conduct an organizational assessment?

The Life Cycle Concept

The concept of the “product life cycle” offers a useful analogy for determining the appropriate timing of an organizational assessment. According to this well documented concept, in general all products follow a life cycle of four phases: introduction, growth, maturity, and decline. Naturally, different products have life cycles of varying duration, but almost all products follow this sequence. Astute business leaders know not to wait until the signs of the “decline” phase manifest themselves before starting development of a new product, as either a renewed version of the existing product or an entirely new one. Rather than scramble when product performance begins to fall, product life cycle theory holds that the optimal time to launch a new product is during the maturity stage of the existing product. This may seem counter-intuitive, since in the maturity stage products are still profitable and appear to be doing well.

Like products, organizations follow life cycles, and the time to assess your organization and prepare to make adjustments for future success is before problems surface. Take your operating systems, for example. When you have worked out the bugs and everything runs smoothly is precisely the time to start looking at what changes you will need to make to meet future demands. If you wait until systems fail to meet your business needs, then you will likely have to make quick decisions without the benefit of thorough research and thoughtful deliberation.

Product (and Organizational Effectiveness) Life Cycle



Signals for Change

The organizational maturity phase can occupy a broad span, and consequently, you may wonder what is the right time to begin a deliberate and thoughtful organizational assessment. Here are some signals that it may be time to assess your organization and consider repositioning steps toward reinvigoration:

- > Loss of strategic focus—for example, programs and services exist or have been approved that do not fit the organization's strategic plan
- > Flat or declining membership following previous increases, especially if the trend is mainly due to lack of retention
- > Increased member complaints, as well as vague responses from non-renewing members when surveyed as to why they did not renew
- > Declining attendance at annual meetings or other key member meetings
- > Declining non-dues revenue
- > Increased difficulty getting volunteers for committee assignments
- > Deteriorating readership scores on publications and/or decreasing hits on the organization's Web site
- > Declining productivity—for example, projects take longer or yield lackluster results

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CASE STUDY: ICPI TAKES THE LEAD WITH TRADE SHOW LAUNCH

By Julie Elfand

With the right team, launching a trade show can take an organization from the minor to major league in terms of member services and industry recognition. You could say this was the case with Hardscape North America (HNA) 2007—the Interlocking Concrete Pavement Institute’s (ICPI) first-ever show complete with educational sessions and product exhibits.

A group of industry leaders founded ICPI in 1993 to promote the use of segmental concrete pavement systems throughout North America. ICPI offers technical, certification, and marketing services to its membership of concrete paver producers, contractors, suppliers, design professionals, and consultants. The relatively young organization identified both a market opportunity and the need for a trade show to serve its broad membership by providing non-product specific education on best practices in addition to product exhibits and demonstrations.

Planning and implementing a trade show launch is a labor intensive job, one that can stretch any organization’s staff to its limits. Recognizing this reality, ICPI enlisted the assistance of Bostrom. Bostrom stepped in to provide meeting planning services, an area in which the company has extensive experience. Site selection, exhibit sales, marketing, registration, and sponsorship are among the services Bostrom provided to HNA 2007. This division of labor allowed ICPI’s technical staff to more effectively apply their expertise to planning the show’s programming and content.

The ICPI-Bostrom partnership resulted in positive returns for HNA 2007. With 1700 paid registrants, the show surpassed ICPI’s goal of 1500. In addition, HNA exceeded its financial goals. Perhaps the biggest surprise came in the overwhelming response to HNA’s certification courses. ICPI added two extra certification sessions because of attendee demand. This in turn added 140 practitioners to the ranks of ICPI’s Certified Concrete Paver Installers. ICPI’s certification program is an important piece of its work to promote the industry through high-quality installations.

HNA 2007 enjoyed its share of satisfied customers like Brian Bagley of Walks of Distinction, LLC: “Hardscape 2007 provided me with a source to begin to move my company to the next level. The training was targeted on the aspects of business to improve my skills, increase market share, and improve profitability. Thanks for a great convention!”

Bostrom consultants were proud to support ICPI in the successful launch of HNA 2007 and look forward to a repeat performance in HNA 2008 scheduled for early 2008 in Nashville, Tennessee.

Julie Elfand, CMP is Director of Meetings for Bostrom and can be reached at jelfand@bostrom.com.

HOW TO AVOID THE HIDDEN COSTS OF TECHNOLOGY

By Chris Hecht and David Andrew

Boon or boondoggle? Technology can prove to be either one or both depending on how an organization manages the acquisition and maintenance of its technological resources. To get the most value out of IT expenditures and to avoid wasting money, organization executives must first view IT as an integration of tools and business goals—high-performance and profitability. This means thinking beyond the one-time acquisition of a piece of hardware or the development of one-off applications for particular projects.

In its white paper, “Aligning IT with Business Goals,” BEA Systems, Inc., a leading infrastructure software developer, presents this insight: How do businesses go about reaching maximum efficiency, responsiveness, and adaptability? Topping the lists at many companies is the strategy of business integration—the seamless integration of people, processes, and systems across the enterprise to drive maximum efficiency, responsiveness, and adaptability. People or the technology users, business processes, and technology tools form the complete IT picture. The structure breaks when one component is considered without the other.

Key to any successful technology initiative is involving both business and IT staff. Business staff, or subject matter experts, understand important processes, their inner-workings, and reasons for existing. IT staff can then leverage this process expertise to apply the right technology to the situation. In addition, significant

IT projects should always follow a detailed and repeatable software development methodology. The right people following the right process with the right technology will help avoid costly mistakes and increase a project’s chance of success.

Costs

IT systems carry with them on-going costs like any other asset—a piece of real estate, for example. Failing to budget for these costs can result in more expensive fixes just as any deferred maintenance does. Organizations should anticipate these basic costs and factor them into their IT budgets:

- > Initiation and Design: Starting and planning projects.
- > Construction: Building the system.
- > Testing: Testing is often short-cycled as a cost saver; however, adequate testing prevents future fixes.
- > Maintenance: Keeping systems running after they are built.
- > Customizations: Enhancing solutions to meet specific business needs.
- > Upgrades: Moving from one version to another.
- > Failures/bugs: Living with known issues or needing to repair them.

With respect to failures and bugs, make sure you have a contract that is beneficial to your organization. This will help alleviate unwanted

GUIDE TO GREENING YOUR ASSOCIATION continued from page 1

Getting Started

One way to start an association greening program is by designating a program coordinator and committee. Coordinating the green program could be part of someone's job description. Volunteer committee membership offers a forum for engaging employees in the process. Once you've established a green team, you can get started greening your association with three key initiatives: recycling, creating a green culture, and shrinking the environmental footprint of your conference or tradeshow.

1. Recycle and E-cycle

Find out specifically what recycling services are available from your building manager and determine material and sorting requirements. Recycling services and requirements vary by building and material recovery company, so you will need to set up your office recycling stations or containers accordingly. Common recyclable items include glass, aluminum cans, plastic bottles and containers, computer paper, and newspaper. Speaking of paper—the EPA estimates that recycling one ton of paper saves 17 trees and 7,000 gallons of water. One year of a large daily newspaper, for example, weighs in at almost half a ton.

Computers and other electronic equipment are a big source of e-waste products, which pose particular threats because of the toxic chemicals they contain, such as lead, mercury, and flame retardants. Environmental experts recommend extending the life of electronics or donating those in good working condition if you need to upgrade. E-cycling offers another viable option for the safe disposal of electronic equipment and supplies. Apple, AT&T, Best Buy, Dell, Office Depot, and Staples are part of a growing list of manufacturers and retail businesses offering e-cycling programs. Follow the EPA link in "Resources" at the end of this article for more information on these e-cycling programs.

2. Create an Earth-friendly Culture

Don't overlook the importance of promoting your green program in-house and educating employees on resource-saving habits—for example:

- > Participating in recycling
- > Powering off computers at the end of the day
- > Replacing paper documents and forms with electronic versions
- > Discontinue using disposable water bottles and styrofoam coffee cups

In support of the last point, re-usable water bottles and coffee mugs for all the staff would make a great give away at a green program kick-off meeting. Finally, it's up to association leadership to communicate expectations and set the tone. Many employers today offer transit card purchase programs as an employee perk encouraging fuel economy.

3. Shrink Your Conference and Tradeshow Footprint

A meeting's environmental footprint refers to the waste that is left behind after the show is over. You can imagine with conferences and

shows of any size the footprint can grow to the size of Big Foot's, but with awareness and planning, this doesn't have to be the case. Use the following tips to keep waste to a minimum at your conferences and tradeshows.

Meeting Site

- > Work with the convention center or hotel on putting out recycling bins for paper, plastic, and metal
- > Select a hotel within walking distance of the convention center and eliminate shuttles

Communication and Written Materials

- > Communicate via e-mail rather than traditional mail
- > Use an online registration system
- > Make two-sided copies on recycled paper
- > Do not hand out a conference bag
- > Place all handouts on the Web site for download or place on CD

Food and Beverage

- > Serve items such as cream and sugar in bulk containers
- > Provide water in pitchers or large-bottled water stations instead of individual bottles
- > Donate consumable items to a local food bank
- > Use cloth instead of paper napkins and cutlery instead of plastic utensils

Hotel Facility Management

- > Request a linen reuse program
- > Request bulk amenities and make sure consumable amenities are not replaced daily

Finally, remember that you are the customer and by asking for environmentally sound services, you encourage vendors and suppliers to bring them to and keep them in the marketplace.

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Resources

Look to the following resources for more information on greening your organization.

Green Meetings Industry Council: www.greenmeetings.info

EPA's Green Meeting: www.epa.gov/oppt/greenmeetings

U.S. Green Building Council: www.usgbc.org

Suppliers and Partners: <http://leedsworld.com/ecosmartideas/>

Office Environment:

<http://coopamerica.org/programs/shopunshop/buyinggreen/greenyuroffice.cfm>

E-cycling: www.epa.gov/epaoswer/hazwaste/recycle/ecycling/donate.htm#recycle

THE ORGANIZATIONAL ASSESSMENT— TAKING STOCK AND GUIDING ACTION continued from page 1

Of course, different organizations have different goals and needs, and an organizational assessment's scope should be tailored to an organization's unique situation. An assessment can be comprehensive or it can focus on specific components of the organization—for example, staff, governance, members, programs, or IT. Each organization should identify who within the organization owns the assessment. Such ownership usually relates to the organizational domain that originally triggered the need for an assessment.

Assessment Process

Regardless of the scope, organizational assessments follow a common course beginning with the formation of an oversight group. The assessment should be a team effort especially if the organization uses outside expertise. Once the oversight group is up and running, the assessment process is set to begin.

Phase One: Develop Assessment Protocols.

Here the first task is setting the goals and objectives of the assessment—in other words, establishing what you expect to accomplish. Next, identify data collection needs and methods (individuals to interview and documents to review), determine research questions, and finalize research procedures.

Phase Two: Conduct Research. This phase comprises data collection, which can employ a variety of methods, including in-person or phone interviews (with volunteer, Board, staff, etc.), Web or paper surveys, or focus groups. Facility and document review also come under data collection. The oversight group meets to check progress.

Phase Three: Conduct Analysis and Develop Recommendations.

Based on analysis of the data, the oversight group makes preliminary recommendations. A recommendation report is drafted and revised as necessary. The Board and staff receive a final report.

Sometimes the assessment report yields findings that the organization does not expect or want, and organization leaders should be prepared for this possibility. It is also important to note that such findings often present the greatest opportunity for positive change. In a recent case, Bostrom consultants found serious communication problems associated with the executive staff at a nationally-recognized association. Unfortunately, they were unwilling to accept this conclusion and terminated the study, thereby maintaining the status quo.

Once an organization has a final assessment report in hand, the next challenge is to consider the assessment recommendations in terms of defined activities, roles and responsibilities, costs, and timing. Here, organization leaders should bear in mind that change is often not a smooth, linear process, and implementation plans should contain room for the naturally uneven pace at which events unfold.

Defined Benefits

Organizations may choose to go it alone through the assessment process without the aid of outside assistance. This option can be cheaper and less formal, but it also can lack the advantages of increased objectivity and an expert, third-party perspective. In either case, a thoughtful, well-executed assessment can leave the organization with an array of important benefits, among them: alignment of Board, management, and staff to leverage strengths and capabilities; increased effectiveness of leadership and staff decision-making; staff structure responsive to the increasing demands of membership; and increased value of the organization in the eyes of its members, stakeholders, and the public.

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HOW TO AVOID THE HIDDEN COSTS OF TECHNOLOGY continued from page 3

By Chris Hecht and David Andrew

arguments over support. Most manufacturers have regular schedules for fixing bugs and might not fix them on a case-by-case basis. For packaged software and custom developed systems, ensure that the Service Level Agreement (SLA) is appropriate to your situation.

Better Project Management, Better Software

Organizations often can perform many business processes with off-the-shelf software packages, such as an Association Management System (AMS) or Microsoft Office. Software as a Service (SaaS) products also offer ready-made options. There may be situations, however, that require custom software development to support processes that these other products do not.

Risk lurks beneath the surface of all solutions; but the good news is that software development success rates have improved. The Standish Group's 2006 Chaos Report found that 35% of software projects were successful—that is, on time, on budget, and met requirements. This compares with a 16.2% success rate in 1994. Nonetheless, the 2006

report still indicated big room for improvement with its findings of 46% of projects “challenged” or late, off budget, or did not meet requirements.

These results tell organization leaders to proceed carefully in defining the time requirements, scope, and cost of custom applications. The Standish Group found good project management as the underpinning of successful projects. Good project management entails educated and involved managers and staff as well as IT and business staff working together through development cycles. Thus, it is important to have the right people with project management expertise—either in-house or outside the organization—to ensure software development supports business goals and does not drain resources.

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THE RIGHT TIME FOR AN ORGANIZATIONAL ASSESSMENT

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- > Prevalence of employee issues: increased turnover, especially in key positions; increased absenteeism; increased employee complaints; low employee morale
- > Presence of staff “silos” in which people are not communicating or working well with staff outside of their own unit
- > Evidence that Board and staff are not in alignment, not communicating effectively, or otherwise not working well together
- > Prevalence of Board issues: agendas that devolve into minutiae; poorly run meetings; poor attendance at Board meetings

Any one or two of these do not necessarily constitute evidence of an impending peak or decline in the organizational life cycle. However, evidence across several of them may mean that it is time to take stock while there is the opportunity for a reasoned and planned repositioning rather than a last minute crisis response later. The decision to conduct an organizational assessment is a major one, not to be made lightly. However,

every CEO and Board member should be alert to the potential signals that perhaps the organization is in the latter part of the “maturity” phase and about to enter the “decline” phase of its life cycle. In sum, organizational assessments, particularly those that are well timed, offer associations an extremely powerful tool to build on strengths, correct weaknesses and maximize member value.”

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* “Association Directions—The Need for Independent Assessments,” SOLUTIONS, Issue VI, pages 2–3.

ABOUT BOSTROM

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