



# **Book 3**

## **Leading & Managing Effective Committees**

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### Leading & Managing Effective Committees

The health of any chapter can be determined by reviewing the strength of its committees. It is through the involvement of members on committees that programs are organized, education events are assembled, membership campaigns are implemented, and actions are presented to the Board of Directors. Effective committees unify, represent, motivate, coordinate, consolidate and communicate on behalf of the chapter and its members. They can also provide a solid training platform for future leaders of the chapter.

Good meetings generate quality decisions, a sense of direction, and provide involvement opportunities for members who may not have the time to devote to being an officer. However, it is important for a chapter to maintain at least one separate committee so that the officers are not saddled with the tasks of managing the day to day of the chapter's operations.

Sample committees that a chapter president may appoint would include programs, education, trade show, legislative, nominations, finance, public relations, etc

#### **How are committees established in the chapter?**

Each year the president should appoint the members and chairs of all standing committees. He or she should consult with the current chairs and other leaders in the chapter and region when making these decisions.

The term of a committee chair is usually one year. Chapter presidents may renew individual terms on a case-by-case basis depending on the levels of enthusiasm and effectiveness. Terms should be addressed in the chapter's bylaws.

Typically, the role of the committee is to implement the actions and specific tasks as set forth by the board during their annual strategic planning session. The committee shares the responsibility of corresponding to the board any actions taken or recommendations for discussion.

A committee should be staffed by a volunteer chairperson who has some leadership experience in directing groups of individuals. It will be the responsibility of the chair to develop an agenda for each meeting, understand the tasks placed before the committee, conduct the meetings of the committee and be able to prioritize the committee's actions.

#### **What is the Responsibility of a committee?**

During the chapter's strategic planning process, a list of committee actions should be identified for the committee to accomplish during the year. If no strategic planning meeting is held, then the chapter Board of Directors should identify the committee charges. These charges may change year to year as the membership changes, or the industry changes, so these tasks need to be evaluated during the chapter's annual strategic review process.

A committee may not commit an expenditure of funds, nor represent a position on behalf of the chapter, unless it has been specifically authorized to do so by the Board of Directors. If a committee wants to host a function that would entail the use of chapter money, the committee must present a program description and budget to the board for approval.

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The committee is also responsible for taking notes or minutes of all meetings and submitting them to the chapter secretary for file.

#### **Who monitors the actions of a committee?**

While the committee is presided over by the chairperson, your chapter may choose to have a member of the Board of Directors attend each committee meeting. Having a member of the board in attendance helps guide the committee, provide feedback to the chairperson, and serve as general resource on discussion topics.

The Secretary of the chapter monitors actions of the Executive Board. They are responsible for maintaining all chapter records, history, member lists, reports, and official business of the executive board. He or she may also have primary responsibility for disseminating information between AFE Headquarters Office and the region in which the chapter is located. Any correspondence that is required to be sent to members, association leaders, or the community-at-large is under the jurisdiction of the chapter secretary.

#### **How should committee actions be recorded?**

Minutes should be completed after every committee meeting and submitted to the chapter secretary for filing in the chapter's history file. The minutes should include items discussed during any official executive committee meeting and/or board meeting. Care should be taken to highlight any items that required a decision and what the outcome resulted in. A synopsis should be included in the next membership newsletter or other communication to members.

#### **How do I develop a committee agenda?**

Today's volunteer has limited time to spend on extracurricular activities. For any volunteer experience, he/she wants their time to be a valuable experience. Here are some guidelines you can follow to ensure that committee meetings are productive and useful of your volunteer's time:

- Provide an agenda sheet with beginning and ending times for the meeting. Include the location of the meeting, a list of the committee members and the topics to be discussed. Include the identity of any member who will be scheduled to make any specific contribution to the meeting.
- Schedule your planning so that plenty of advance notice is sent to members. A minimum of three weeks is usually ample time for people to plan to attend
- Send the agenda out prior to the meeting so the members have time to review discussion topics and prepare whatever reports and information they feel might be needed.
- Sequence agenda items thoughtfully. Start the meeting with topics that will unify the committee and help them work together. Do not put difficult items back-to-back. People need a break. Be sure to build in time for breaks. Finally, end the meeting with a topic that will unify the committee so that people leave the meeting believing they have accomplished something for the time spent.
- Provide written background information for each agenda item where necessary
- Identify the person who is responsible for reporting on each item

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- Consider including time for regional representatives to speak on regional and national items of interest. This will keep committee members informed of actions and items of interest that might be forthcoming.

#### **Do's and Don'ts for the committee chairman**

##### **Do:**

- Develop a work plan that explains what the committee's tasks are for the year
- Develop agendas and conduct productive meetings.
- Approve the report of the committee before it is disseminated to the chapter secretary and others.
- Report to the chapter officers on decisions and actions the committee would like to take.
- Recruit new volunteers and interested members to serve on your committee.
- Where appropriate, guide the committee in proposing services and programs that will further the goals and mission of the chapter.
- Be aware of the feelings of members and look for visual clues that a member is not happy. Remember – committee participants are also members – keeping members happy will keep your chapter running smoothly.
- End the meeting by thanking everyone for participating and noting the date and time for the next meeting.

##### **Don't**

- Monopolize the discussion. Be a facilitator of the meeting and encourage input from all members.
- Encourage clashes of personalities – encourage the clash of ideas. Good decisions come when all committee has examined all sides of an issue.
- Permit one-sided discussions – ensure that all members enjoy being heard at all times. Directly ask members for their opinions and thoughts to ensure they are encouraged to provide input.
- Allow talkative members to spin the committee off-track. Always monitor participation and draw out silent members.
- Always look for a unanimous decision. Seeking a consensus is fine – you won't always get a unanimous vote.
- Ignore the committee's agenda – If a topic is raised that does not relate to the discussion, control the meeting by indicating this item will be discussed at the end of the agenda under "new business." This will keep your committee members more focused.

#### **Chapter Committees**

Every chapter is encouraged to make maximum use of committees to achieve the goals and objectives of the chapter. Committees help to spread the burden of work among the members of the chapter and provide

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excellent opportunities for chapter members to be actively involved in the projects and activities of the chapter. The bylaws of most chapters provide for one or more “standing” committees. The duties of these committees may be specified in the bylaws. The chapter president is required to appoint a committee chairman immediately after assuming office. Minimally, the three most common standing committees are the nominating committee, the membership committee, and the program committee. Additional committees that a number of chapters use, include:

- Planning and budget
- Publication and periodicals
- Professional development
- Legislative affairs/liaison
- Promotions, publicity and public relations
- College and university relations (includes student chapters)

To provide a brief example of items contained in a “committee charge” here is an overview of typical membership committee activities. In most chapters, the membership committee is responsible for all membership recruiting and retention activities which involve:

- Inputting annual plans for membership recruiting and retention
- Contacting prospective members
- Inviting prospective members to chapter activities
- Hosting guests at chapter meetings
- Developing and maintaining accurate lists of prospective members
- Encouraging existing members to renew their AFE membership each year
- Channeling successful, creative ideas on membership recruiting and retention to AFE so they may be shared among all chapters

Special Task forces are groups appointed to deal with special projects/activities which do not recur on a regular basis. The chairman of each special task committee is appointed by the chapter President. These groups usually operate for a specific time frame specified. The time period may be extended usually at the direction of the chapter President.

**Chapter Executive Committee** – The chapter executive committee often serves as the “oversight” committee on finance, policy and planning. The Chapter President serves as a chairman of the executive committee and all elected chapter officers are automatically members of the committee. Some chapters also include the chairmen of all other standing committees as members of the executive committee.

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The specific duties of the executive committee and the extent of its authority are usually defined in the chapter's bylaws. In many chapters, the executive committee is charged with the responsibility of developing the annual operating plan. Once the plan is approved by the chapter, the executive committee is charged with the responsibility of ensuring that the goals included in the plan are achieved.

Most chapters also allow the executive committee to operate as the governing body of the chapter between chapter meetings. The executive committee is usually authorized to expend chapter funds (up to a stated limit) without seeking approval from the chapter membership.

#### **AFE Mission and General Objectives**

Every program or activity undertaken must contribute fulfilling the mission and objectives of the organization. The degree of "performance contribution" of each program is measured yearly against these and specific program objectives.

AFE's strategic/operational planning process, conducted under the guidance of the Planning and Resources Group (PRG) is a yearly, ongoing activity. The organizational mission, being a broad statement of the overall purpose of AFE does not change markedly from year to year. However, each year it is readdressed to help AFE remain in tune with the times. The general objectives begin to "scope- out" the mission statement, giving insight to all areas of operation (programs and activities.) To keep AFE fluid, proactive, and in constant search of ways to further improve the value of membership, the general objectives will likely change over each three- to five year time period.

#### **AFE Goals**

- Maintain sound financial position
- Provide valued services and relationships for all members
- Be the recognized leader in facilities training and education
- Be the recognized leader in facilities training and education
- Expand membership
- Gain recognition for "expert" database
- Embody facilities engineering and management excellence
- Expand sphere of influence
- Research and disseminate latest technology and requirements
- Support personal, professional and social needs

#### **AFE Mission Statement**

"To be the world leader in integrating the management, engineering and resources of facilities operations and systems."

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### **Chapter Charter Agreement**

The purpose of this document is to grant approval from the national AFE organization to new and existing chapters to operate a local chapter in a specified, geographic region. In addition, chapters will benefit from the formal relationship by being legally associated with the national AFE organization. The chapter agrees to adhere to all published AFE policies and procedures and AFE's code of ethics.

*Please contact AFE Headquarters staff to request a copy.*

### **Tradeshaw Agreement**

All chapters and regions that conduct tradeshow and seminars are required to submit a Tradeshow Agreement to the National Headquarters including contract specifications with a producer. The purpose of this document is to grant approval from the national AFE organization to new and existing chapters to use AFE's name and logo.

*Please contact AFE Headquarters staff to request a copy*

### **Model Chapter Bylaws**

Every AFE chapter is required to submit a copy of the chapter's bylaws. We have included a model in case your chapter's bylaws need a total revision or just some fine-tuning.

#### **MODEL CHAPTER BYLAWS**

##### **ARTICLE I-NAME AND LOCATION**

The name of this organization shall be the \_\_\_\_\_ Chapter (# ) of the Association for Facilities Engineering. This chapter is generally located in, which is defined as its major geographic service area.

##### **ARTICLE II-OBJECTIVES**

The objectives of this chapter shall be the same as the organization purposes defined in the AFE Bylaws. The major focus of this chapter's programs and activities shall be in fulfillment of the needs and expectations of members generally located in the chapter's service area.

##### **ARTICLE III-USE OF FUNDS**

The chapter shall use its funds only to accomplish the purposes and objectives referenced above. No funds shall insure to the benefit of, or be distributed to, the members of this chapter of AFE. (Note: This is a standard clause that protects the chapter. It should not be construed to preclude member expense reimbursement, where duly authorized by the Chapter)

##### **ARTICLE IV-MEMBERSHIP**

All members of this Chapter must be members of AFE. All requirements for membership shall be defined in the AFE Bylaws.

#### **ARTICLE V-DUES**

Chapter dues are as specified by the chapter's Board of Directors, with the approval of the Chapter's membership.

#### **ARTICLE VI-MEETINGS**

**Section 1: Chapter Meetings.** Regular meetings of this Chapter shall be held at the time and place designated by the chapter President, or the chapter's Board of Directors, upon 15-day notice.

**Section 2: Quorum; Voting.** A quorum shall consist of 40% of the (voting) Members. A majority of those Members present and voting shall govern.

**Section 3: Conduct of Chapter Meetings.** Chapter meetings shall be chaired by the chapter President. In the absence of the President, meetings are chaired by the Vice President, or other chapter officer selected by the President. The meeting shall be conducted according to Article XI of these Bylaws (Rules of Order)

#### **ARTICLE VII-BOARD OF DIRECTORS**

**Section 1: Authority.** The chapter's Board of Directors shall be the governing body of the chapter. The Board may delegate portions of its authority to the chapter Executive Committee.

**Section 2: Composition.** The Board shall consist of eight individuals: the five officers-a President, Vice-President, Secretary, Treasurer, an Immediate past President; and three directors. The officers shall constitute the Executive Committee. All are elected by the (voting) Members of the Chapter. The President is the Chapter Delegate unless he is not a full Member. In this case, the President must designate an Alternate Delegate, who must be a full Member.

**Section 3: Nomination and Election.** (A) Nominating Committee: The immediate Past President shall be the chairman of the Nominating Committee, which shall be composed of two additional members selected by the President. (B) Timing; Nominating Process: In the fall of each year, the Nominating Committee shall present a candidate from among the members of the chapter for each position on the Board about to be vacant. Elections may be conducted at a regularly scheduled chapter meeting or by 30-day mail ballot.

**Section 4: Term of Office.** The term of office is one year for all officer positions, and three years for the three Director positions (staggered so that one director is elected each year). Any officer may serve a maximum of two consecutive terms in the same office. Directors may serve a single, three-year term as a Director. All terms of office, as well as the administrative and fiscal year shall commence on January 1.

**Section 5: Board Meetings; Quorum.** The Board shall meet no less than four times each year at the time and place designed by the chapter president. In meetings of the Board, 50% of the Board members being present shall constitute a quorum. Meetings shall be conducted according to Article X1 (Rules of Order)

#### **ARTICLE VIII-DUTIES OF OFFICERS AND DIRECTORS**

- A. President:** Presides at all meetings of the Chapter, Board, and Executive Committee; appoints all committees; is responsible to the chapter members for efficient and effective conduct of chapter affairs.
- B. Vice President:** In the absence of the President, presides at all meetings. Additional duties are as assigned by the President.
- C. Vice President, Membership:** reports to chapter president, chairs chapter membership committee and coordinates membership retention and new membership activities with regional membership chairman.
- D. Secretary:** Responsible for official meeting minutes; chapter records, and related activities.
- E. Treasurer:** Keeps an accurate record of all receipts and disbursements; submits summary financial statement to AFE (for use with group tax exemption); makes payments with approval of the Executive Committee; submits reports at each chapter meeting or otherwise as directed by the President; prepares annual budget.
- F. Immediate Past President:** Chairs the Nominating Committee, serves as advisor to the President.
- G. Directors:** The duties of the three directors are as defined by the President, with the approval of the Board.

#### **ARTICLE IX-SPECIAL AND STANDING COMMITTEES**

##### **Section 1: Standing Committees**

There shall be, among others, the following standing committees:

- A.** Nominating
- B.** Membership
- C.** Planning and Budget
- D.** Programs
- E.** Professional Development
- F.** Promotion, Publicity and Public Relations
- G.** Publications and Periodicals
- H.** Legislative Liaison
- I.** College and University Relations

**Section 2: Special Committees.** The President, with the approval of the Board, may appoint such task forces, study groups, sub- committees and the like as warranted.

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**Section 3: Authority; Reporting.** The specific charge of each committee-both standing and special-shall be as specified by the President, with the approval of the Board. All committees shall report to the Board of Directors through the committee’s chairman or otherwise as directed by the Board.

#### **ARTICLE X-FINANCE**

In advance of the upcoming year, a budget shall be developed under the direction of the treasurer, and approved by the Board of Directors, covering the next fiscal year.

#### **ARTICLE XI-RULES OF ORDER**

The rules contained in the current edition of Robert’s Rules of Order shall govern the conduct of all meetings.

#### **ARTICLE XII-DISSOLUTION**

In the event of dissolution of the chapter, all funds and other assets will be turned over to AFE.

#### **ARTICLE XIII-AMENDMENTS**

Amendments may be proposed by: (1) the chapter’s Board of Directors on its own initiative; or (2) written petition signed by 25% of the (voting) members of the chapter. Amendments will be approved upon two-thirds vote of those Members qualified and voting by 30-day mail ballot.

### **Evaluating Chapter Performances**

The ultimate performance measure of the chapter is provided by the members of that chapter through the annual membership renewal process. That’s the bottom line. Improving the perceived member value of a chapter’s programs and activities cannot be a one-shot affair. It’s an ongoing process, tied to a chapter’s annual operating plan.

A major step in strengthening the chapter’s performance as seen through the eyes of the “ultimate authority” - the individual member - is to begin assessing the chapter’s current status. A helpful guide in doing this is the Chapter Evaluation Checklist.

#### **Purpose of the Chapter Evaluation Checklist**

The Chapter Evaluation Checklist is designed to provide AFE chapters and others with the means of evaluating the overall performance of an AFE chapter. The checklist can be used to pinpoint the specific strengths and weaknesses of a chapter, enabling one to more easily recognize areas of the chapters’ operations which are in need of improvement. The checklist, however, is only the first step.

Chapter leaders should work together to develop an aggressive plan to correct deficiencies and to further strengthen the chapter’s overall performance. The key to this is targeting chapter programs to identify member needs.

#### **When to Perform the Evaluation**

The chapter should be evaluated a minimum of once each year. Semi-annual evaluations enable better determination of the progress the chapter is making. Suggested six-month evaluation points are at the mid-

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point and end of the year. This interfaces with the Chapter's annual operating plan.

#### **How to Perform the Evaluation**

The evaluation checklist covers three major areas of chapter operations: (1) chapter membership; (2) chapter organization and management; and (3) chapter meetings and programs. The checklist also provides space for comments from the chapter and recommendations from the evaluating officer. Since many of the questions require the evaluator to have knowledge of membership statistics, meeting dates, etc., it may be necessary for officers to work together to complete certain portions of the checklist.

Before undertaking an evaluation, the evaluator should carefully explain the purpose of the evaluation to the chapter officers. Chapter members should always understand that the evaluation is for their benefit and will help them to build a stronger chapter—one capable of providing increased benefits to the members.

#### **Scoring the Evaluation**

Positive and negative point values are assigned to the response choices under each of the various checklist questions. Positive points are awarded to reflect favorable trends. Negative points are assigned to answers which indicate unfavorable performance. For example, a chapter which experienced a 15% increase in membership would receive a positive, 10-point rating for that area. A chapter whose membership decreased by 15% would receive a negative 10 points for that item.

After all the questions have been answered, the total number of points is calculated. In general, chapters with positive point totals are operating well, while chapters with negative totals are good candidates for special counseling and assistance. However, point totals are only an indication of the relative strength or weakness of a chapter. Even chapters with lower positive point totals might benefit from the help of the group director or vice president-region director.

#### **Reporting the Evaluation**

One copy of the evaluation form should be mailed to the region director; one to AFE Headquarters. The evaluator should retain a copy of the evaluation for the chapter's files. These forms become a record of the chapter's performance over a period of time.

#### **Strategic and Operational Planning**

##### **Overview**

The following presents highlights of AFE's strategic/operational planning process and related information. It provides general background on the nature and scope of the process, areas of consideration, types of activities, etc., the Planning and Resources Committee (PRC) typically undertakes in developing/updating AFE's strategic and operational plans.

The strategic portion is more general than the operating segment, covers a longer time frame (five years), and has a yearly roll-over feature. This provides a more long-range focus, assisting the consistency of year-to-year directions. The operating segment of the planning process targets the detailed steps, program/activity

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organization, timing and specific resource allocation (per program or activity) necessary to carry out the next year of the strategic plan. The operating plan (one year) then, is the tactical portion of the overall five-year plan.

This process helps AFE to:

- forecast future changes needed to combat competitive pressures
- determine the optimum mix of AFE membership services and benefits members will likely expect in light of changing environmental (and other) influences over this five-year time horizon
- organize resources (all types) in the most productive way-and with sufficient advance planning-to fulfill these future needs and expectations of members.

While all the complexities and details involved with this total planning system may not be relevant to a specific chapter, the concepts are likely to be. This is particularly true for the short-run (annual) operating plan portion. From that perspective, then, it is recommended that the chapter carefully evaluate the implications of strategic assessments in developing its annual operating plan.

#### **The Scope of Planning**

Market-Centered (Member Needs) Approach proper planning involves a market-centered approach. This means that the focus of all planning centers on the needs of the member (primarily) market-the constituency that makes up AFE.

A market-centered approach is the opposite of a product-centered approach. In a product-centered approach to planning, typically one would have preconceived notions of the types of programs members want... And the delivery systems needed to meet those needs...i.e., a newsletter, type "X, Y and Z" meetings, etc. Unless these notions of what members want are based on solid research – which more often than not, they aren't – there is a sizeable chance the programs and activities will miss their mark.

This adds up to poor attendance, less than enthusiastic acceptance, and, in fact, a weak complex of member benefits in total terms...as seen by the members. (The ultimate "power" in any professional association rests with the individual member. He or she casts an annual vote of confidence in the benefits being received through the membership renewal process)

#### **What's involved in Meeting Those Needs?**

Market-driven planning results in programs that meet identified member needs-as defined by the members. As with (national) AFE, what an individual chapter wants to do must reflect what the members of that chapter want it to do. The ultimate purpose of any association (both the national, in an overall sense, and each of its chapters) is to determine the problems/challenges of the constituency (the members), and then help them solve those problems. To do this involves:

- Determining member/non-member (i.e., the consumer) needs, desire, and problems or challenges (as individuals or individual companies) that are being faced now, and those likely for the future

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- Defining what expectation these consumers have for the association, in general, what it should be providing and what it should be doing
- Identifying consumer expectations of the use, specific benefit, and overall value of the association's mix of products, services, and activities
- Assessing the current and future needs of the association as an organizational entity. As with #1 above, this will involve the likely impact of political, governmental, legal, societal and other trends
- Initiating products and services (programs that meet both consumer and association needs and expectations)
- Targeting the development and execution of related programs in a cost-efficient, effective way. (Efficiency means doing it right; effectiveness means doing the right things. Both are important!)
- Evaluating, yearly, the degree each program or activity is contributing to member-need satisfaction

#### **Vital Planning Elements**

The following discussion lists considerations involved in conducting effective planning. Some of these are attitudinal; some deal with the process specifically.

Need for change – to meet the challenges of the future, associations will have to modify basic approaches, philosophies, and operational styles in order to continue being successful. Planned, results-oriented change to meet shifting environmental conditions and resulting changes in member needs/expectations will be needed

- Success – is a process; it is the progressive realization of worthy goals; it is measured by results achieved in light of the potential to achieve
- Needs analysis strategies are closely intertwined with the three primary roles for marketing in an association:
  - Research-data collection; analysis
  - Positioning-the association and related programs mix; pricing, promotion, and distribution strategies. Long-term improvement in marketing productivity-the ability to improve the results achieved in the research and positioning roles.
  - Communicating the value of your products and services so that the Marketplace understands
- Strategic planning is much different than typical long-range planning (which is often trend-line extrapolation oriented.) In strategic planning, the plan integrates and drives the budget. In long-range planning, the budget drives the plan
- Strategic planning is objectives-oriented, emphasizing needs analysis and purposeful action. Strategic

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#### planning

- Identifies opportunities for association programs-products, services, and activities
  - Focuses on achieving results
  - Identifies the “what” and “how” to measure performance of the various programs and activities
  - Highlights tradeoffs critical to defining, analyzing and selecting alternative courses of action
  - Assesses the relative strengths and weaknesses of decision choices, enabling the selection of the optimum alternative
  - Equips the association to deal with contingencies
  - Marshals all resources in the most efficient and effective way to maximize results
- This analysis is especially critical to step 1 – the strategic audit, and later in the program-service planning phase.
  - In the strategic audit phase we determine:
    - Member/non-member (prospect) profiles. This includes data on age, experience, education, responsibility level, length of time a member, membership category, etc. It is often valuable to secure similar data on former members here, too.
  - From the above we find out what we know-or don’t know-about current (and former) members. Is the member mix changing? If so, how and why? Is the association attracting younger members-who are the lifeblood for the future? Why or why not? What type of members stay with the association? Why? What type drops out? Why?
  - Measurement, by itself, is of no real value. Comparison of the data to yield conclusions is the key. (This is important in analyzing trends in survey results)
  - Environmental Analysis. This helps define the target market, it gathers historical, present and future prospective that pinpoint the arena in which members and prospective members operate. It forecasts likely trends and provides an analysis of the competition. This phase involves understanding developments and trends in: the economy; technology; government/regulatory agencies; political, legal, and sociological trends.
  - The strategic audit provides all those involved with the associations’ planning effort a common “database” including:
    - Analysis of the external environment
    - Analysis of internal conditions
    - Identification of opportunities and threats

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- Identification of strengths and weaknesses
- Description of critical issues
- Planning assumptions
- In specific relation to the overall membership effort, the planning process identifies markets; market needs and expectations; market demographics, target markets for specific programs; program mix. Particular emphasis is placed on competitive and other factors that influence membership promotion and retention strategies.
- This process allows the leadership to:
  - Anticipate change
  - Plan effectively
  - Be flexible and viable, responding quickly when necessary
  - Adapt to new conditions
  - Above all, stay “in touch” with member needs/wants and provide the indispensable service/benefit.
- Identifying member/prospect needs and expectations, analyzing the data, developing/refining products and services, etc must be an on-going process.
- We can stay in touch with members-and track their needs-and how we’re doing-through:
  - Periodic mail and/or phone surveys
  - “On-site” surveys at conventions; expositions; conferences and seminars; general meetings. Regional/local discussion groups called for this purpose
  - Chapter/section/statewide general meetings (as applicable)
  - Leadership surveys and discussions
  - Informal phone calls to members-the key: ask the right questions and listen
- Telephone surveys can be effective for hot issues, where give-and-take type feedback is required; fast response, limited scope items; confidential information, etc. The use of direct mail surveys provides a cost effective, easily administered way of gathering needed data. For valid, results-producing mail surveys:
  - Every question must have an objective.
  - Vary question type and format to maintain interest.
  - Always pre-test survey.
  - Stick to a 4-page (11 x 17 stock) maximum length, or response dwindles.

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- The bulk (80% plus/or minus) of the time on the survey process should be spent in survey planning (including drafting, etc.)
- Positioning: proper positioning strategy helps identify specific programs and activities upon which the organization can target its efforts. Positioning involves these seven steps:
  - Identify consumer-perceived needs as he/she sees things.
  - Group individuals (or single market elements) with similarly perceived needs; profile their demographics (and psychographics, as appropriate.)
  - If a product/service has multiple forms, cluster the various forms that satisfy the similar perceived needs.
  - Determine what other products/services are competitive to each perceived need. What do the consumers (or potential consumers) consider acceptable alternatives? How “competitive” is the competition?
  - Develop information on how the consumer perceives your product/service in terms of its advantages and disadvantages in comparison with the competition.
  - Structure a competitive matrix. This describes available products and services, prices, general marketing strategy and types of solutions offered for each consumer-perceived need. Then note the gaps.
  - Armed with this information, plus additional information of the resources available (an when, etc.) one can then realistically determine which of the positioning options will most likely yield the best return on total investment, net ROI on assets (resources) employed.