

2010

fwPASS

Dean Willson

[Case Study on Continuous Improvement Running a Non-Profit Professional Association chapter]

This e-book is intended to serve as a historical reference chronicling the incremental improvement efforts that were undertaken with the objective of growing a professional organization from infancy to a self-sustaining organization

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Purpose

This e-book was created to provide insight to potential new leaders using an example of the process as seen through another leader's perspective.

A secondary objective is to introduce a simple, but effective process of creating a continuous improvement process that can incrementally transform an organization or operation quickly with minimal stress.

Introduction

The [fwPASS](#) organization is a group of technical professionals with an interest in being part of a community that focuses on advancing their learning and market leadership in a rapidly changing, yet increasingly important IT industry. The primary organizational activity is a monthly meeting lasting one to three hours. The typical meeting agenda follows:

- 30 minutes social and networking over pizza and beverages
- 10 minute attendee introductions
- 5 minute sponsor message
- 5 minute speaker introduction
- 45-75 minute speaker/presentation with educational demonstration
- 5 minute SWAG raffle
- 30 minutes informal Q & A, discussion, networking

Although the organization is non-profit and run by volunteers on a part time basis, it has many of the elements of a traditional business.

- Sales & Marketing
- Finance
- Purchasing
- Recruiting
- Operations

The most significant administrative challenges can be classified into the following categories:

1. Lining up speakers

2. Acquiring sponsors to offset the costs of food, beverage, and supplies and provide door prizes and reference/educational material
3. Member growth and retention
4. Event planning and logistics

Background

March 2008-May 2009 Initial formation of the organization and spin-off from an established [NUFW](#) .Net Users Professional Association. The group first started as a special interest group (SIG), later as an official chapter of the international [PASS](#) organization.

Baseline Information

- Single page static web presence and a LinkedIn Group with approximately 30 members.
- Organization logo
- No dedicated emailing functionality; using the NUFW branded email list and email distribution process and service
- No analytics on website or emails
- No inventory of SWAG – books, software, products to give away to the event attendees as door prizes
- No speakers on the schedule
- No record of financials
- No operational instructions, checklists, or management system

Starting a professional organization with regular monthly meetings is a time consuming and difficult project, assuming it gets off the ground to begin with. We owe many thanks to the founding members for all that effort.

Organizational Objectives

- Grow the organization
 - Bigger organization – more exposure to higher quality speakers, easier to get speakers on the roster
 - Ability to develop and serve a larger piece of the Northeast Indiana technical community
 - More opportunities for sponsors

- Streamline the processes
 - Easier and less time consuming to manage
 - Defined roles and responsibilities
 - Easier to delegate the workload
 - Provide a high quality consistent experience for all stakeholders (speakers, members, board, sponsors, community, national organization)

The Story

I transitioned to the role of President in April 2009 when the former President relocated to a new job. Being President of this organization is both voluntary and a very part time effort, but that doesn't mean I didn't have high expectations of the opportunity for improvement and growth.

Since I had little experience running a professional organization, I needed to learn about the basic responsibilities for just keeping the meetings running (baseline) after which I could identify areas for improvement and begin planning for and executing strategies for growth. Every month after monthly event, I would reflect on what I learned, what worked and didn't work, what I wanted to see improved in the next cycle of improvement, and the rationale for the next steps.

The Approach

I approached my role the way I approach most projects. I prioritize activities based on desired outcome, balanced with time and resources available. Most of the improvement activities were deliberately designed to move a small step forward in each major category of work (speakers, sponsors, growth, operations) every month based on lessons learned in the process.

Historical Improvement Detail

May 2009

- Gain administrative access to the website so I could add content and information about upcoming meetings.

- Understand process for acquiring SWAG from publishers, get the process started for the upcoming meetings (end goal - to acquire three months of SWAG to minimize monthly preparation efforts).

June 2009

- Dynamic website, simple content management system with home page, contact page, event info page.
- Website analytics (Google Analytics).
- Method to understand basic financials break-even/loss (spreadsheet).
- Start a meeting preparation checklist.

July 2009

- Venue change – room to grow, consistent seating experience, ease of access (streamline meeting logistics), access to WIFI for speakers/presenters and attendees.
- Basic system for email newsletter/ meeting notification including method to unsubscribe (custom software I created due to lack of free options for the current subscriber list size).
- Method to register/ track attendance for event (custom functionality for the event page of the CMS) – eventual options are the CodeZone website and services like EventBrite.

August 2009

- Ability to open a past generated email in the newsletter emailer program.
- Ability to log who the emails were sent to (and when).
- Ability to send a preview test message to a select user list.
- Downloads page for past presentations.
- Process for requesting to be added to the subscriber list (manually use the website contact form).

September 2009

- Save email template for look consistency and save time creating. Screenshot of software and text email in Figure 1.

- Create a brochure for general info about the group for distribution at other events like SQL Saturday's, PTI Back to School events, posting at the Universities.
- Create a speaker event promotion brochure format.
- Creation of a meeting bug-out box to assist in pre-meeting preparation.
- Automatically add unsubscribe instructions to the bottom of the email.

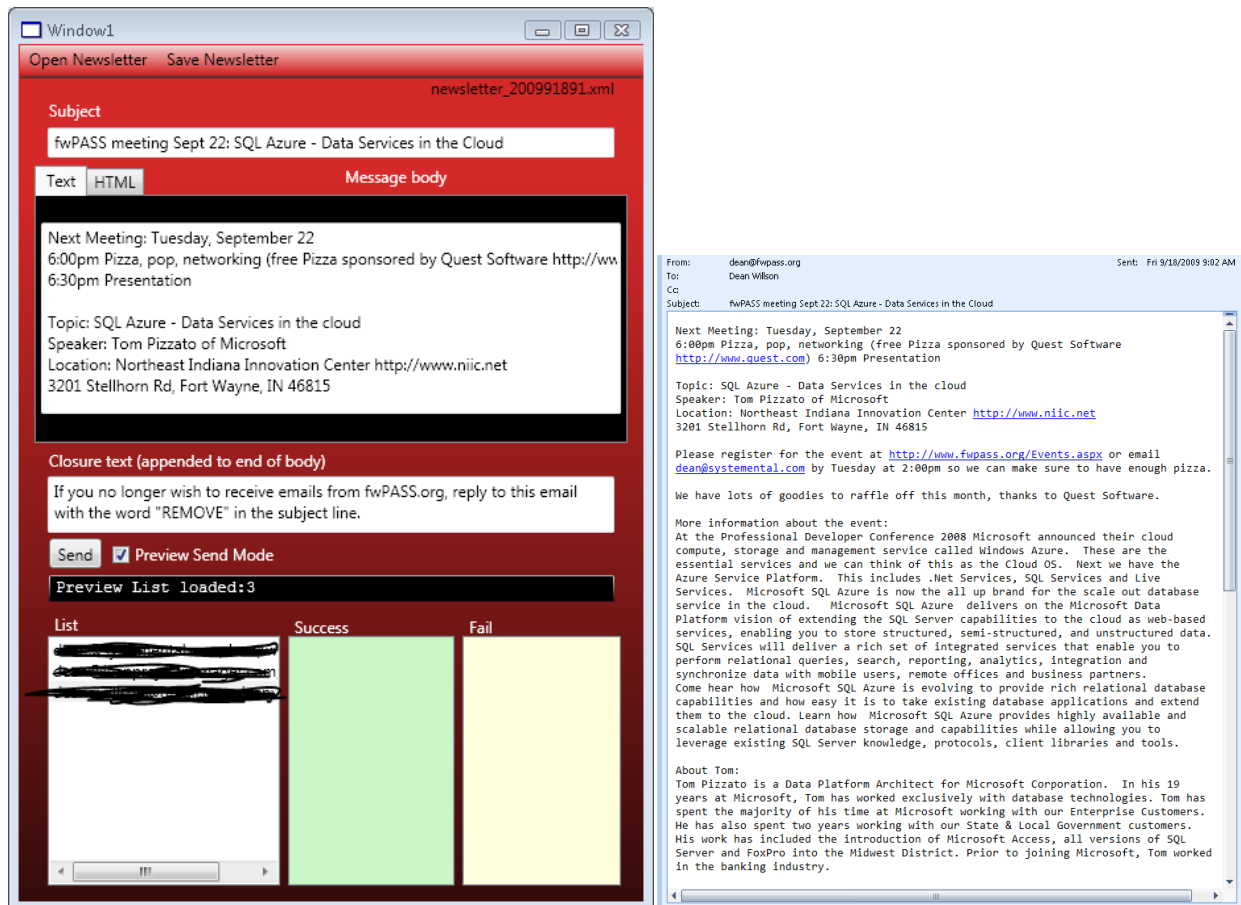


Figure 1

October 2009

- Ability to have the most basic level of newsletter click tracking (bit.ly). Found that more than 50% of the attendees register the night before or the day of the event. Analytics on the email opening/clicking may help to predict the approximate number of attendees prior to the meeting. When speakers are coming from out of town, I want to feel comfortable that it will be worth their trip.
- Add news page on website for links to sponsor and partner offers, links to free web-conference training events.

November 2009

- Create business cards for when I meet people that may be interested (website and word of mouth are the primary promotion vehicles).
- Increase organic traffic with addition of a blog.
- Increase targeted traffic with social networking.

December 2009

- Made this meeting a joint off-site (local eatery) social event with the NUFW group to minimize the required effort during the busy holiday season. It is difficult to get speakers to commit during the holidays with vacations, family, and unpredictable Indiana winter weather (snow/ice).

January 2010

- Ability to track the growing SWAG inventory (spreadsheet).
- Official sanctioned newsletter campaign management system complete with list management, and full analytics, and HTML emails ([MailChimp](#)). Example email in Figure 2.
- Method to let users to manage their pizza donation and attendance - cash box and event registration list.
- Start work on this Case Study.

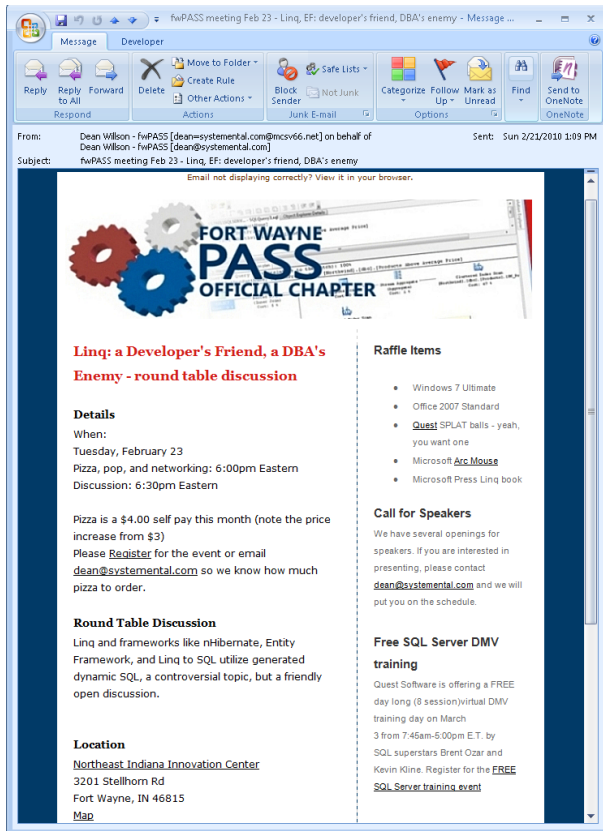


Figure 2

February 2010

- Add SWAG inventory worksheet and record of distributions.
- Add email newsletter subscribe link to website.
- Add improvement history worksheet to management spreadsheet.
- Method to speed up the pizza order management process to minimize cost over-runs and leftovers.
- Process to manage supply order process (pop, cups, plates, napkins) to minimize inventory and manage cash flow.

April 2010

- Create an fwPASS [SlideShare](#) account to upload the monthly International Chapter slide decks.
- Embed national chapter decks to the fwPASS site as a blog post.
- Create an fwPASS [facebook](#) page.

May 2010

- Create a standard sponsor information packet indicating the number of people on the mailing lists and identifying the various marketing channels where their sponsor activity will be noted. Identifying the most common sponsor items and how they can be implemented.

July 2010

- Change the email template to have a light background so when people reply to the email the text is readable (not black on navy blue background). Sample in Figure 3.

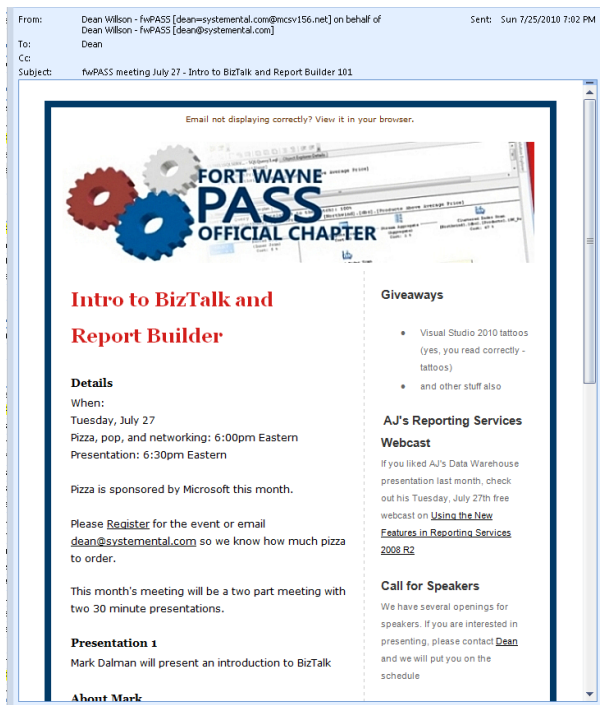


Figure 3

About the Author



Dean Willson is the President of [fwPASS](#) and a change practitioner and leader for [Systemental](#) who specializes in integrating information technology resources with the objectives of management and production users. He is technologically and business bi-lingual, helping both management and production design the systems they need and want in non-technical terms, and then translating their desires into the precise programming direction that the software development team requires. Dean's 15+ years of experience as a software developer includes 11 years of direct manufacturing background as an Engineer in Product Manufacturing, Processes, Controls, and Value Streams. Dean is a certified Six Sigma Black Belt. From the software controlling pull inventory systems and manufacturing processes to sales and operations planning. Dean writes about [Practical Business Process Improvement](#) and [Software Development](#) on his blogs and [twitter](#).