

# Wake Up Your Non-Profit

By Barbara Bennett and Marye Gail Harrison

*Not-for-profit doesn't have to mean not-for-progress. Volunteers at a wilting non-profit organization came up with seven steps to revitalize it with a new focus on service.*

The idea for our revitalization experiment began over drinks at "The Purple Pig." We didn't know each other, although we had been members of the same non-profit organization for two years. But that night we were so disgusted that we complained openly.

"You know, I'm embarrassed to bring someone into that group."

"I know what you mean. The meetings don't do a thing for me, and the newsletter is a disgrace—full of mistakes. The board seems to be desperate to find people. Positions get filled with warm bodies rather than with people who could really do the jobs."

"I'm about ready to drop out. Why should I waste my time?"

"You too? I thought I was the only one who feels that way."

We decided we were no longer willing to give our time simply to keep a wilting organization from going under. We wanted to learn new things, try things out, and do something that would make a difference. For an individual, those goals were daunting, but together, we could make the adventure begin.

## Thinking big at the Purple Pig

"I'd like to see a full-blown organizational development process used here. You know, planned change: 'Where are we now?' 'Where do we want to be?' Get everyone involved in finding the answers. I think that's what we need."

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"I've been reading that book, *Service America!* The concepts are exciting. It gets into satisfied customers, service strategy and 'moments of truth.' It gives a whole new approach to managing service; any organization could use it. I'd love to try out those concepts."

"That sounds great! Managing service is a good way to look at it. We really are a service organization that needs to wake up to the times; we

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## It's painful to admit that your own organization has become a drag

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could use service as a long-term strategy."

It's been more than three years since that clandestine talk, and oh, how things have changed. Once we latched onto each other to get things started, we found many talented people who were willing to join in. Our non-profit organization (a local chapter of the American Society for Training & Development) proceeded slowly through a seven-step revitalization plan—with rewarding results (see member comments in "I Could Hardly Believe the Change").

## Step 1: get the leaders to recognize the problem and commit to change

It's painful to admit that your own organization has become a drag, so we started tactfully at the top.

We asked the board president if she would like to have us explore ideas for

improving service and long-range planning. She was interested, if we would oversee the project through formal positions on the board.

As "insiders," we presented a plan for a one-year study of customer needs, keeping this formula in mind:

$$\text{Change} = D + V + S + C$$

The equation asserts that for change to happen, an organization has to

■ 1. Be *Dissatisfied* with its present state.

■ 2. Have a clear *Vision* of where it wants to go.

■ 3. Take the necessary *Steps* to get there.

■ 4. Create enough energy (or tension) to overpower the *Cost* required (in terms of time, money, and energy) to make the change happen.

Our dissatisfaction had sparked our desire for change. We wanted to make the board members confront their own dissatisfaction, so they too would be energized to help revitalize the organization.

First we appealed to the volunteer board members, as business people, to look at our non-profit organization as they would look at the best service corporations.

We explained the concepts of service management as described by Karl Albrecht and Ron Zemke in *Service America!* We asked board members to complete a survey designed to capture their "moments of truth," points at which customers come into contact with the organization and form impressions for better or worse. As board members discussed their frustrations and identified personal "highs," they seemed to come alive. Intrigued and energized, the board agreed to look at service—as long as we explored both positive and negative aspects.

## Step 2: excite members with service-management concepts

Once the flames of the board members' dissatisfaction had been fanned, it was easy to get commitment for a membership meeting devoted entirely to service-management ideas.

We wanted people not only to attend the meeting, but to leave committed to leading our group through a planned change. So we designed a dynamic meeting that did three things.

- We started from our members' perspective. We asked questions to elicit feelings about poor service: "How many of you have waited in line only to find out it was the wrong line?" "How many of you admit that some of our meetings have left you feeling down?"

We suggested we could use a "hot" new concept called "service management" to determine our own needs, learn something new, and rejuvenate the organization at the same time.

- We presented new ideas. We explained what service management is all about—the management of a cycle of customer service. Every organization has certain touch points or "moments of truth." The trick is to identify the touch points and to manage the delivery of those points so that customers have positive experiences every time.
- We got people involved. Every person at the service-management meeting filled out a "Moments of Truth" survey. Inactive, experienced members (who had been asked to attend) facilitated feedback groups. Emotions ran high as people had a good time identifying both positive and negative moments of truth. By the time it was suggested that we survey all our customers—our members—the same way, buy-in was complete. Volunteers signed up to help with various aspects of the planned change.

## Step 3: listen to complaints and compliments

A three-page questionnaire was designed to collect complaints and compliments from members. We asked people to supply demographic information and their primary reasons for joining the organization. Then we focused on dissatisfaction and satisfaction by asking open-ended questions. We wanted people to describe specific moments of truth: "Think about the contacts you've had with the local chapter of ASTD. Describe the times

you felt let down or dissatisfied."

The questionnaire was distributed to

- board members (as a pilot);
- "old timers" (who facilitated discussion groups);
- everyone who attended the service-management meeting;
- all other members, by mail.

A team devised a system to evaluate and summarize responses. We presented a written report to the board and later published it in the newsletter. Results showed that operations and logistics problems created the most dissatisfaction, while networking and professional development were the most attractive and satisfying aspects of the organization.

### Vision Statement

We, the Connecticut ASTD Chapter Members,

- are recognized as competent and respected contributors to our profession, our organizations and our community;
- support and promote both personal and professional growth;
- offer a warm, sharing atmosphere that encourages synergy and makes a person feel welcome;
- provide a creative, stimulating, and vibrant environment where people can continue to learn and grow as training and development professionals.

The energy behind the project took off in two directions as board members responded to results. Some immediately began addressing short-term problems, while others focused on the longer term.

## Step 4: take immediate action

As members of the board used the "moments of truth" survey results to improve service, their highly visible actions energized the organization.

The newsletter editor published better articles, printed phone numbers for networking, and gave accurate directions to events. A member who was a computer nut gave the newsletter a more professional appearance with his desktop publishing program.

The new membership chair appointed a welcoming committee and gave red carnations to guests. A central office was secured with the help of a local university; a staff person was made available to answer members'

questions over the telephone. But even with all the changes taking place, we weren't sure we could keep the momentum going.

## Step 5: define your vision or mission

It was time to go back to the formula for change ( $Change = D + V + S + C$ ). If we really wanted to revitalize the organization for the long term, we knew we had to create a vision—a focus to guide us in the years ahead.

We held another large membership meeting. At the "vision" meeting, people were challenged to imagine the possibilities. With eyes closed, individuals created their own fantasies—what the organization would look like, feel like, and act like if it were perfect. A state-of-the-art video showed that separate perspectives must merge into a cohesive whole. By the time small groups participated in a values-clarification exercise, recorders could hardly keep up with the rush of ideas.

By the end of the meeting the group agreed on four vision values—respect, growth, warmth, and a vibrant environment. Participants took home a vision kit so they could implement a vision process themselves.

Over pizza, the board took the four vision concepts and hammered out a vision statement that would guide the organization year after year (see "Vision Statement.")

Next, the board met to specifically define the organization's reason for existence.

After debating every word, we defined our chapter's purpose:

*Our purpose is to provide a resource and forum for our members and others responsible for the training and development of people at work, so that our members, their organizations, and the business and professional community at large become more innovative, competent, and effective.*

## Step 6: build a strategic plan

Having pinned down our vision and mission statements, the board was off to a strategic-planning retreat to create the steps we would need to take in order to change the organization for the long term. We spent the day struggling to answer the following questions:

- Who are our customers?
- What do they want?



- What do we provide?
- What don't we provide?
- What's the worst that could happen?
- What's the best?
- How can we make our vision concepts work?

At the end of an exhilarating and ex-

hausting day, we emerged with a list of objectives.

### Step 7: activate the plan

The ideas generated at the retreat were circulated to board members to set the stage for an action-planning

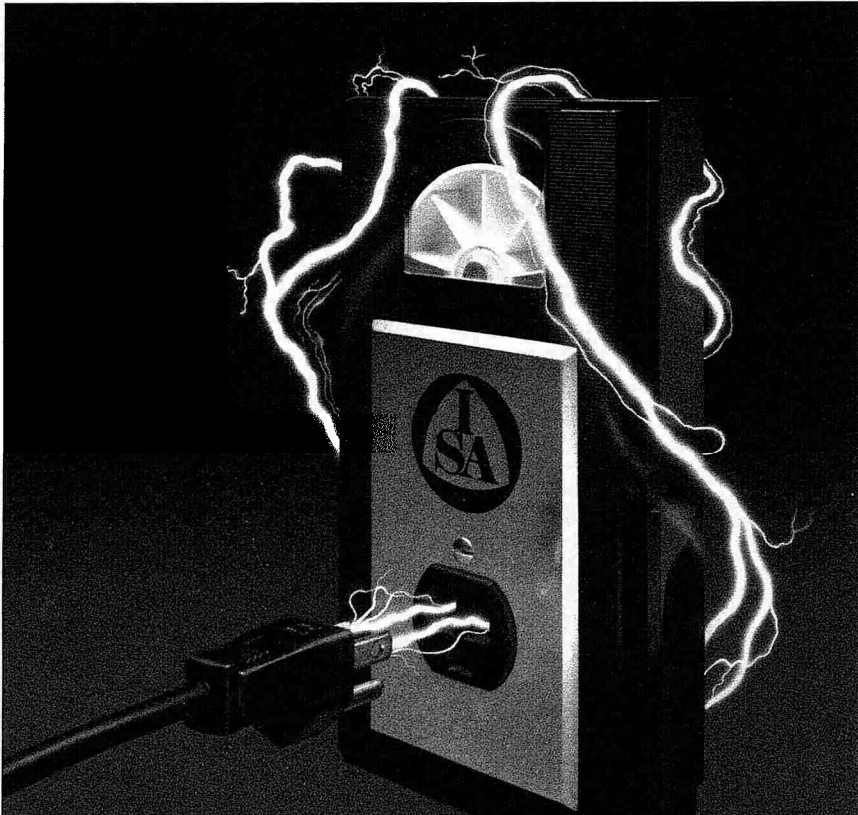
meeting. Accountable teams were formed for each major vision objective. Each team was to figure out how to implement long-term strategies.

One team worked hard on creating organization structures consistent with the vision. For five consecutive Friday afternoons, they met to brainstorm and evaluate options. Their recommendations for change were enthusiastically received by the board. The process renewed the team members' interest in the organization.

### Service with a style

Those are the seven steps our group followed. Today the original project team has been replaced by vision teams; organization structure has been changed and board members are held accountable for implementing strategic plans. The vision provides a sense of vitality and continuity as volunteers come and go.

Our not-for-profit organization has turned the moments of truth into a positive service edge.



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### "I Could Hardly Believe the Change!"

It's been more than three years since the change effort began. We know we've made a difference simply by what we hear from our members:

*I was home reading through a pile of mail and came across a newsletter. I mentioned to my husband how professional this one looked. Then I realized it was ours. I could hardly believe the change!*

*The vision wasn't just an exercise. We never lost touch with it. It was repeated everywhere—in announcements, in the newsletter, at meetings. People put it into practice.*

*The bigger you get, the more personal you have to be. I feel my ideas are welcomed and valued at this chapter. I have a chance to be part of the results.*

*I've never felt this energized before and I've been in ASTD for 17 years. The possibilities are endless. I even volunteer for office. Now I'm president-elect.*