



COMPETENCIES FOR ASSOCIATION EXECUTIVES



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CANADIAN SOCIETY OF ASSOCIATION EXECUTIVES
SOCIÉTÉ CANADIENNE DES DIRECTEURS D'ASSOCIATION

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INTRODUCTION

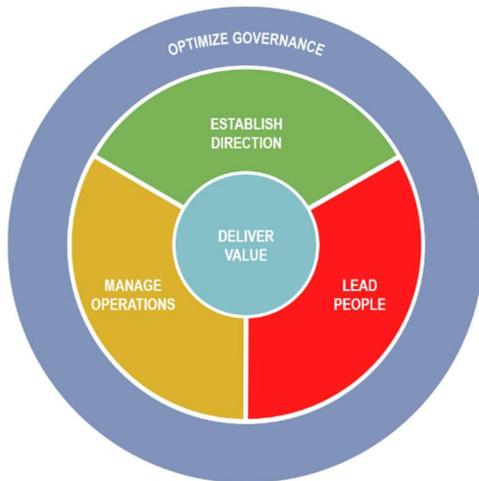
Competencies for Association Executives is intended to provide a guide to performance in senior leadership positions within the association and not-for-profit (NFP) sector. This document is the foundation of the Certified Association Executive® (CAE®) program and it seeks to outline all the major activities that should be completed in a high performing organization. As such, it is a useful tool for all association and NFP professionals, whether or not they are pursuing a CAE® designation. Created by peers and subject matter experts, the competencies are meant to outline the critical areas of activity within an association or NFP organization.

This document is not prescriptive. It does not provide instruction on exactly how to complete tasks in each area of focus but presents options for consideration. There is never just one solution to the challenges faced by an association or NFP and the landscape is always shifting. Leaders of associations must weigh various factors including their budget, their internal capacity, and their strategic objectives before selecting their priorities and the most appropriate solution given their unique situation. In some organizations, a team member or entire department may be dedicated to one of the competencies listed in this document while in others, the CEO is the only staff resource. The best approach for one organization may not translate to another.

Competencies for Association Executives is helpful tool for:

- Priority setting: Chief Staff Officers (CSO) can work with their boards and their staff to identify the most important tasks to tackle in any given fiscal year.
- Assessment: Boards can use the document as an assessment tool to determine key strengths and areas of development for the Chief Staff Officer.
- Development: Leaders in the sector can use the document as a guideline for personal professional development.
- Planning: Boards and CSOs can plan for succession in the organization by identifying upcoming priorities and what resources will be needed to succeed.
- Capacity building: Chief Staff Officers can use the document to assist them in building a team that complements their own strengths and weaknesses.

COMPETENCIES OVERVIEW



Optimize Governance

1. Ensure effective and efficient governance
2. Contribute to the effectiveness of the board and committees
3. Lead development of a strategic plan
4. Advise the board on issues requiring their input
5. Develop a risk management strategy

Establish Direction

1. Analyse current financial state of the organization
2. Develop a long-term business strategy
3. Develop an annual business plan
4. Develop and maintain brand and reputation
5. Develop partnerships to achieve organization objectives

Lead People

1. Evaluate human resource requirements
2. Recruit staff and volunteers
3. Onboard staff and volunteers
4. Establish staff and volunteer codes of conduct
5. Manage individual performance
6. Manage teams
7. Manage change
8. Conduct ongoing personal leadership development

Manage Operations

1. Manage day-to-day financials
2. Manage an annual external financial audit or review engagement
3. Manage facilities
4. Manage equipment
5. Manage technology
6. Develop operational practices

Deliver Value

1. Collect evidence-based data
2. Identify needs of segments
3. Conduct continuous improvement of organizational offerings

Optimize Governance

Competencies and supporting competencies

You'll find the key skills as well as key outputs for each of these supporting competencies on the following pages.

1 Ensure effective and efficient governance

- 1.1 Identify authorities related to governance
- 1.2 Confirm organization is compliant with authorities related to governance
- 1.3 Define governance structure
- 1.4 Conduct ongoing review of governance
- 1.5 Advise on scope of activities
- 1.6 Define board and Chief Staff Officer (CSO) relationship
- 1.7 Ensure reporting obligations are met

2 Contribute to the effectiveness of the board and committees

- 2.1 Support election process for new board members
- 2.2 Advise on process of onboarding board members
- 2.3 Advise on succession plan
- 2.4 Facilitate ongoing evaluation of board, committees and individual board/committee members
- 2.5 Advise on ongoing development of board

3 Lead development of a strategic plan

- 3.1 Conduct ongoing environmental scanning
- 3.2 Advise board on creating mission and vision for organization
- 3.3 Develop strategic plan
- 3.4 Plan for evaluation of organizational performance against strategic plan

4 Advise the board on issues requiring their input

- 4.1 Prepare for board and committee meetings
- 4.2 Prepare reports for the board or committee
- 4.3 Prepare presentations for board or committee
- 4.4 Ensure compliance with legislative or regulatory requirements
- 4.5 Maintain insurance for organization

5 Develop a risk management strategy

- 5.1 Establish risk principles and guidelines for staff
- 5.2 Develop risk management plan

1 Ensure effective and efficient governance

Importance

The impact of mastering these competencies is:

- Compliance with all regulatory bodies
- Compliance with the organization's stated bylaws and policies

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

1.1 Identify authorities related to governance

- Review governing legislations under which your organization is incorporated (such as provincial legislation, national not-for-profit corporations act, and special legislation)
- Identify regulations pertinent to the organization (such as bylaws, members, financial disclosure, directors and officers)
- Identify constraints specified in articles of incorporation
- Review bylaws of the organization
- Review policies of the organization

KEY OUTPUT(S):

Organization bylaws
Organization policies

1.2 Confirm organization is compliant with authorities related to governance

- Identify gaps between authorities related to governance and practice
- Develop an action plan to comply with governance requirements (such as bylaws, policies)

KEY OUTPUT(S):

Compliance action plan

1.3 Define governance structure

- Identify governance models (such as Policy Board, Governance Excellence Model, Operational Board, or Carver Model)
- Establish a governance model for the organization

KEY OUTPUT(S):

Governance model document

1.4 Conduct ongoing review of governance

- Facilitate ongoing review of policies and bylaws by board of directors (such as practices, legislation, regulations, and articles of incorporation)
- Facilitate creation of codes of conduct (such as for individual directors, the board as a whole, members, CSO, staff, and so on)
- Establish schedule for benchmarking against other associations to assist in identifying policy gaps and best practices
- Prepare reports for board (including recommended changes to bylaws, policies and/or practices)
- Draft new bylaws and/or policies, as directed by board (such as legislation, regulations, and articles of incorporation)

KEY OUTPUT(S):

Organization bylaw revision
Organization policies and procedures
Code(s) of conduct
Board policy
Membership policy

1.5 Advise on scope of activities

- Draft terms of reference for board and board committees
- Draft position descriptions as applicable (such as board chair/president, vice-chair, treasurer, secretary, director, committee chair, and chief staff officer)
- Identify Executive constraints (such as signing authority, compensation, and conflict of interest)
- Identify CSO Constraints (such as signing authority, finance, and hiring)
- Present scope of activities (terms of reference and position descriptions) to board for approval

KEY OUTPUT(S):

Committee terms of reference
Board position descriptions

1.6 Define board and Chief Staff Officer (CSO) relationship

- Manage relationship with Chief Elected Officer (such as means of communication, frequency of meetings)
- Define board and CSO relationship vis-a-vis key functions (such as budgeting, hiring and terminations, advocacy, staff or member grievances, and so on)

KEY OUTPUT(S):

Protocol for reporting

1.7 Ensure reporting obligations are met

- Submit required reporting obligations (such as bylaw changes, changes in officers/directors, annual corporate or charity return, and statutory remittances)
- Identify non-statutory reporting obligations (such as minutes, bylaws and revisions, policies and revisions, and financial statements)
- Develop process for communicating records (such as access to records, mechanism for providing records, and system for archiving records)

KEY OUTPUT(S):

Board reports

Governance records including Annual General Meeting (AGM) and members' meeting minutes

2 Contribute to the effectiveness of the board and committees

Importance

The impact of mastering these competencies is:

- Effective and efficient committees
- Smooth onboarding of new board members
- A competent board with the skills required to lead the organization

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

2.1 Support election process for new board members

- Identify bylaw requirements for election of directors
- Support board in establishing a nominating committee (such as potential conflicts of interest, members, and meeting schedule/timelines)
- Establish competency assessment process with the board (such as essential competencies for directors, core competency areas for your board, and rating scale for competency self-assessment)
- Support nominating committee in recruitment process (such as recruitment priorities and campaign materials)
- Support nominating committee in selection process (such as screen applicants, report of candidates' self-assessments, and analysis of candidates)
- Prepare for election (such as slate of nominees, eligible voters, required notice for AGM, and voting process)
- Support board to conduct election

KEY OUTPUT(S):

Board competency assessment
Board competency matrix
Call for board nominations

2.2 Advise on process of onboarding board members

- Collaborate with board to establish committee that will oversee onboarding process
- Establish orientation program in collaboration with onboarding committee (such as orientation session, timelines, materials, facilitators, agenda, assessment)
- Establish mentoring program for new directors (such as objectives, expectations, benefits, mentoring process, and materials)

KEY OUTPUT(S):

Board orientation process
Board mentoring process

2.3 Advise on succession plan

- Identify key roles for which succession plan is necessary (such as board officers, chief staff officer/executive director, committee chairs)
- Define elements of succession plan (such as authority for implementation of plan, types of succession, candidates for each type, development plan for candidates, recruitment process, communication to stakeholders, implementation process)
- Monitor implementation of succession plan (such as the status of primary/alternate candidates)
- Evaluate implementation of succession plan
- Update succession plan based on evaluation results

KEY OUTPUT(S):

Board succession plan

Chief Staff Officer (CSO succession plan)

2.4 Facilitate ongoing evaluation of board, board committees and individual board/committee members

- Collaborate with board to establish committee that will oversee evaluation process
- Establish evaluation process for board meetings, committees and individual directors (such as performance areas to be evaluated, type of evaluation, and timeframe)
- Manage process annually (or bi-annually as determined) with administrative support from CSO
- Research tools and practices for comprehensive full board assessment, including CSO
- Make recommendations to board for approval of tools and frequency of use
- Manage full board assessment (such as, lead discussion and analysis of results, making recommendations to improve effectiveness or alignment with governance model)

KEY OUTPUT(S):

Rubrics for evaluation of board, board Committees and individual directors

Board evaluation results

2.5 Advise on ongoing development of board

- Collaborate with board to establish committee that will oversee board development process
- Identify board development needs (such as competency assessment, succession plan, evaluations, strategic plan, and risk management framework)
- Establish activities to support board development (such as symposiums, governance training, crisis management training, and webinars)
- Allocate funds for board development in annual budget

KEY OUTPUT(S):

Board development plan

Checklist of board development needs

3 Lead development of a strategic plan

Importance

The impact of mastering these competencies is:

- A clear direction for the organization

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

3.1 Conduct ongoing environmental scanning

- Establish a plan to collect data for environmental scan (such as method, frequency, and accountability of data collection)
- Collect information on various components of environmental scan (such as political, economic, human, financial, and real assets)
- Analyze information gathered in environmental scan to describe impact on future direction of organization (such as partnerships and opportunities)
- Determine organization's options as a result of data analysis

KEY OUTPUT(S):

Environmental scan

3.2 Advise board on creating mission and vision for organization

- Identify team to participate in mission/vision setting
- Establish mission/vision process
- Execute mission/vision session with stakeholders
- Validate mission/vision with members and stakeholders
- Finalize mission/vision
- Develop plan to communicate the mission/vision

KEY OUTPUT(S):

Organization mission

Organization vision

3.3 Develop strategic plan

- Identify stakeholders to participate in strategic planning process
- Establish process to develop strategic plan
- Produce strategic analysis based on environmental scanning (such as SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis, PESTLE (Political, Economic, Social, Technological, Environmental, Legal) analysis)
- Produce strategic plan which will guide organization for 2-3 years

KEY OUTPUT(S):

Strategic plan or strategic priorities document

3.4 **Plan for evaluation of organizational performance against strategic plan**

- Establish key performance indicators (KPIs) against strategic goals to measure impact of strategic plan

KEY OUTPUT(S):

Monitoring reports/dashboard

4 Advise the board on issues requiring their input

Importance

The impact of mastering these competencies is:

- Board meetings that cover the most critical topics
- An informed board capable of making decisions on behalf of the organization

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

4.1 Prepare for board and committee meetings

- Establish regular communication schedule with board or committee chair
- Create meeting agenda with board or committee chair
(such as financial statements, policies for review, items for board approval/vote, risk management issues)
- Prepare board or committee meeting materials
(such as accessible format, adequate lead time for review, compliance with policies)
- Confirm logistical requirements
(such as meeting format, technical requirements, other requirements, accessibility)

KEY OUTPUT(S):

Meeting schedule
Meeting agenda

4.2 Prepare reports for the board or committee

- Identify purpose of report
(such as provide information, request approval, generate discussion, seek investment, access reserve fund)
- Determine relevant information required given purpose of report
(such as business case, industry background information, risks/opportunities, financial impact)
- Prepare report

KEY OUTPUT(S):

Annual report
Reports to board and members

4.3 Prepare presentations for board or committee

- Identify purpose of presentation
(such as report highlights, event summary, recommendation for change, or proposal)
- Select format
(such as PowerPoint, Prezi, flipchart, overhead projection, oral, handouts)

KEY OUTPUT(S):

Presentation

4.4 **Ensure compliance with legislative or regulatory requirements**

- Develop information gathering strategy for compliance issues (such as RSS feeds, newsletters, Google alerts, and government relations contacts)
- Identify compliance requirements (such as maintenance of not-for-profit/charitable status, industry requirements, human resources (HR) requirements, accessibility, language requirements)
- Establish annual compliance work plan (such as roles and responsibilities, government requirements)
- Include work plan in board packages
- Provide board with updates on compliance actions

KEY OUTPUT(S):

Compliance work plan
Compliance training

4.5 **Maintain insurance for organization**

- Identify organization's insurance needs (such as liability, moving, renovation, fire, tenant insurance)
- Conduct annual meeting with organization's insurance provider
- Make changes to policy as required

KEY OUTPUT(S):

Organizational insurance policies

5 Develop a risk management strategy

Importance

The impact of mastering these competencies is:

- A clear picture of risk tolerance at the board level
- Guidelines for staff in terms of managing risk

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

5.1 Establish risk principles and guidelines

- Identify areas of risk organization could face (such as financial, reputational, technological, political, legal, environmental, human resources, competition)
- Identify board's level of risk tolerance in each area

KEY OUTPUT(S):

Organizational risk profile

5.2 Develop risk management plan

- Create plan to mitigate threats (such as maintaining an investment reserve against potential threats in strategic and operational plans, establish which decisions can be made by staff, which decisions require board input)
- Create plan to capitalize on opportunities (such as reducing expenses, adding new revenue streams, purchasing insurance where possible)

KEY OUTPUT(S):

Risk management plan

Establish Direction

Competencies and supporting competencies

You'll find the key skills as well as key outputs for each of these supporting competencies on the following pages.

1 Analyse current financial state of the organization

1.1 Interpret financial documents

2 Develop a long-term business strategy

2.1 Conduct business analysis

2.2 Develop plan for capital assets

2.3 Recommend long-term financial strategy

3 Develop an annual business plan

3.1 Convert strategic objectives into specific priorities for fiscal year

3.2 Develop annual budget

3.3 Conduct budget process

4 Develop and maintain brand and reputation

4.1 Identify elements that support brand of organization

4.2 Profile stakeholders

4.3 Develop brand strategy

4.4 Establish crisis management protocol

5 Develop partnerships to achieve organization objectives

5.1 Determine potential partnership opportunities

5.2 Develop collaboration agreements

5.3 Establish communication plan with partners

5.4 Evaluate performance against collaboration agreement

1 Analyse current financial state of the organization

Importance

The impact of mastering these competencies is:

- A clear picture of the financial state of the organization
- An annual plan based on solid financial reasoning and data

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

1.1 Interpret financial documents

- Identify components of key financial documents (such as statement of operations, statement of financial position, statement of cashflow, and statement of changes in equity)
- Identify frequency with which each statement should be reviewed (such as monthly, annually)
- Measure impact of financial data on operations (such as revenues under budget, reducing expenses, cashflow too low to meet financial obligations)
- Develop action plan to address impacts of financial data (such as reducing expenses, increasing investments, transferring funds, increasing resources, cancelling events)

KEY OUTPUT(S):

Statement of operations
Statement of financial position
Statement of cashflow

2 Develop a long-term business strategy

Importance

The impact of mastering these competencies is:

- Long term health of the organization
- Annual plan is financially supported

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

2.1 Conduct business analysis

- Project future revenues and other sources of income (such as member dues, non-dues revenue, grants, fundraising, affinity programs)
- Identify factors affecting the industry or market (such as regulatory changes, new technologies)
- Identify long-term financial impact of internal conditions (such as leases, real estate needs, technology, human resources, compensation plans)
- Identify impact of financial conditions on long term business strategy
- Identify how long-term financial viability will support strategic plan

KEY OUTPUT(S):
PESTLE analysis
SWOT analysis

2.2 Develop plan for capital assets

- Define tangible and intangible capital assets
- Distinguish difference between capital and operating expenses (such as real estate, Guaranteed Investment Certificates (GICs), equipment)
- Identify organization's capital assets
- Identify future assets (such as upcoming technology, equipment, facility requirements)
- Create cost/benefit analysis for capital investments (such as budget for investment, amortization policy, lost business, reputational harm)
- Establish action plan for capital acquisition (such as business plan for investment in real estate, equipment)

KEY OUTPUT(S):
Investment Plan

2.3 Recommend long-term financial strategy

- Identify financial strategy development team
(such as board members, treasurer, Chief Financial Officer (CFO), accountant)
- Determine objective of long-term financial strategy
(such as sustainability, financial growth, wind down the organization)
- Establish timelines including range of long-term strategy
(such as 3, 5, 10 years)
- Determine frequency for reassessment of strategy
- Adjust long-term plan as needed

KEY OUTPUT(S):

Long-term financial forecast

3 Develop an annual business plan

Importance

The impact of mastering these competencies is:

- Annual plan is aligned with strategic plan and priorities
- All staff have a clear view of how their role supports the annual and strategic plans
- Priority initiatives are supported

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

3.1 Convert strategic objectives into specific priorities for fiscal year

- Identify operational planning team
- Establish timelines
- Adopt operational plan template
- Identify major activities
(such as individual accountabilities, metrics, timelines)
- Establish financial impact of each activity

KEY OUTPUT(S):

Annual operational plan

3.2 Develop annual budget

- Establish budget process
(such as team, timelines, and template)
- Establish financial impact of long-term commitments

KEY OUTPUT(S):

Annual budget

Financial statements

3.3 Conduct budget process

- Conduct financial environmental scan
(such as analysis of recent actuals, financial statements, other relevant reports, variance, vendor quotes)
- Develop financial impact of planned initiatives and expenditures on budget
(such as forecasted impact of internal/external changes, initiatives with greatest impact on budget)
- Validate expenses and revenues for all initiatives
- Finalize budget to support operational plans
- Prepare board level budget documentation

KEY OUTPUT(S):

Annual budget

Financial statements

4 Develop and maintain brand and reputation

Importance

The impact of mastering these competencies is:

- Communication plan that supports objectives of the organization
- Communication strategy that promotes all initiatives
- Clear guidelines to follow during reputational crises

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and produce the key outputs.

4.1 Identify elements that support brand of organization

- Identify unique value proposition of the organization
- Identify key characteristics that distinguish organization from other organizations (such as visual identity, specific products and services, strategic initiatives, and communications channels)

KEY OUTPUT(S):

Marketing and communications plans

4.2 Profile stakeholders

- Identify stakeholder segments (such as staff, volunteers, members, prospective members, participating non-members, partners, competitors, government, media, segments of the general public)
- Create stakeholder personas

KEY OUTPUT(S):

Personas of each stakeholder group

4.3 Develop brand strategy

- Analyze organization's goals to establish brand objectives (such as strategic priorities in annual operational plan, opportunities and threats, brand objectives)
- Create plan to support brand objectives (such as desired outcomes related to each stakeholder segment, key areas of activity to support desired outcomes, timelines, evaluation measures)

KEY OUTPUT(S):

Key messages on behalf of organization

4.4 Establish a crisis management protocol

- Determine potential circumstances that could put organization's reputation at risk (such as financial risk, political risk, environmental risk)
- Identify how crisis protocol will be activated (such as steps to take and authority to activate protocol)
- Identify content development process (such as who will develop and what approval is required to communicate crisis-related messages)
- Outline steps for internal (staff, volunteers) and external communication (such as updated communication lists, who will provide communication to each audience, communication channels, listening strategy)
- Establish timelines for regular review of protocol to ensure it is up to date

KEY OUTPUT(S):

Crisis management protocol document

5 Develop partnerships to achieve organization objectives

Importance

The impact of mastering these competencies is:

- Partnership objectives are clearly defined
- Partnerships successfully deliver on objectives
- Time isn't wasted supporting unproductive partnerships

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

5.1 Determine potential partnership opportunities

- Identify partnership types available to organization (such as advocacy, shared lobbying objective, public awareness, brand building, community building, educational, operational, revenue generating)
- Define which relationships will constitute a partnership (such as exhibitors, technology providers, advertisers, sponsors, similar associations, international bodies, government, content contributors, educational institutions, event planners, consultants)
- Evaluate effectiveness of existing partnerships (such as objectives, success, strength of partnership)
- Identify partnership priorities for organization (such as list of partnership opportunities, potential partners to address opportunities)

KEY OUTPUT(S):

List of partnership priorities

5.2 Develop collaboration agreements

- Identify objectives of partnership
- Identify deliverables from each partner
- Establish timelines for delivery
- Establish plan for dissolution of collaboration agreement

KEY OUTPUT(S):

Collaboration agreements with partners

5.3 Establish communication plan with partners

- Determine goals of communications
(such as build relationship, measure progress of partnership, determine satisfaction with partnership, manage change throughout project/partnership)
- Create relationship management calendar
(such as regular meetings, communication schedule)

KEY OUTPUT(S):

Follow up emails
Phone calls
Visits
Feedback surveys
Holiday greetings
Deadline reminders

5.4 Evaluate performance against collaboration agreement

- Measure performance against deliverables
(such as organization's performance, partner's performance)
- Identify performance gaps
- Communicate performance gaps
- Develop action plan
(such as to resolve performance gaps, modify/terminate collaboration agreement)

KEY OUTPUT(S):

Improve performance action plan

Lead People

Competencies and supporting competencies

You'll find the key skills as well as key outputs for each of these supporting competencies on the following pages.

1 Evaluate human resource requirements

1.1 Identify human resources required to achieve organization goals in collaboration with management team

2 Recruit staff and volunteers

2.1 Develop position profile for staff and key volunteer positions

2.2 Establish search committee

2.3 Recruit candidates

2.4 Develop interview process

2.5 Hire selected candidate

3 Onboard staff and volunteers

3.1 Develop onboarding processes for staff and volunteers

4 Establish staff and volunteer codes of conduct

4.1 Develop policies and procedures aligned with applicable workplace health and safety legislation

4.2 Identify organization specific standards of behaviour

4.3 Establish process for employee compliance with codes of conduct

5 Manage individual performance

5.1 Establish a process for reviewing individual performance within organization

5.2 Establish individual job performance expectations aligned with annual operational plan

5.3 Support individual performance

6 Manage teams

6.1 Establish behaviour expectations

6.2 Identify team goals

6.3 Track progress

7 Manage change

7.1 Define change agenda

7.2 Plan change

7.3 Implement change

7.4 Sustain change

8 Conduct ongoing personal leadership development

8.1 Determine personal leadership capacity

8.2 Invite feedback

1 Evaluate human resource requirements

Importance

The impact of mastering these competencies is:

- Organizational structure supports objectives
- Clear picture of what skills and competencies need to be recruited or developed

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

1.1 Identify human resources required to achieve organization goals

- Establish a human resources requirements team
- Identify required competencies
- Identify existing staff competencies
- Prepare gap analysis between existing and required competencies
- Develop action plan to address current gaps
(such as develop or train existing staff, recruit volunteers, outsource job function, hire on contract basis, hire new staff)
- Develop a hiring policy
(such as non-discrimination on the basis of sex, gender, race, religion)

KEY OUTPUT(S):

Staff competency analysis
Competency gap analysis
Staff training plan

2 Recruit staff and volunteers

Importance

The impact of mastering these competencies is:

- Right people in the right positions to support objectives

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

2.1 Develop position profile for staff and key volunteer positions

- Identify key requirements for position
- Identify financial remuneration range
- Identify benefits package
(such as vacation, lieu policy, sick days, parking spot)

KEY OUTPUT(S):

Job description
Benefits package
Compensation package

2.2 Establish search committee

- Identify who will be involved in decision-making process
(such as direct supervisor, role dependencies, external search firm)
- Create candidate evaluation criteria
(such as hard skills, professional designation, language skills, soft skills, diversity requirements, geographical location)
- Develop job ad

KEY OUTPUT(S):

Position profile
Interview questions
Job advertisement

2.3 Recruit candidates

- Advertise position
(such as using recruitment firms, job boards, websites, referrals, social media, internal posting)
- Identify top candidates

KEY OUTPUT(S):

List of key candidates

2.4 **Develop interview process**

- Establish interview guide
(such as in person, skype, phone, panel or individual questionnaire, number of interviews)

KEY OUTPUT(S):
Interview questions

2.5 **Hire selected candidate**

- Develop job offer
(including remuneration, benefits, contractual obligations, hours of work, role, flexibility)

KEY OUTPUT(S):
Employment contract

3 Onboard staff and volunteers

Importance

The impact of mastering these competencies is:

- New employees are successfully integrated into their roles
- New employees and volunteers are supported

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

3.1 Develop onboarding processes for staff and volunteers

- Develop organizational orientation program
(including any paperwork that is required for payroll and benefits, preparation for employee's start day, assigning any necessary training, welcoming the employee on the first day, creating a checklist to ensure new employee has signed off on all necessary paperwork, assigning a key contact to confirm all necessary documents and signatures have been submitted)
- Develop role-specific orientation process
(such as job shadowing, software training, orientation, mentoring, role standards)

KEY OUTPUT(S):

Onboarding template
Orientation Plan

4 Establish staff and volunteer codes of conduct

Importance

The impact of mastering these competencies is:

- Staff and volunteers have clear guidelines for what is expected of them in their environment
- Non-compliance can be addressed

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

4.1 Develop policies and procedures aligned with applicable workplace health and safety legislation

- Identify applicable workplace health and safety legislation (such as anti-harassment or anti-bullying policies, whistle blower, non-discrimination)
- Monitor changes to applicable workplace health and safety legislations
- Update policies and procedures as required

KEY OUTPUT(S):

Code of conduct

4.2 Identify organization specific standards of behaviour

- Determine any additional requirements beyond legislation (such as absenteeism, working from home, conduct at events, purchase of alcohol, nepotism, social media, moonlighting, dress code, fitness for duty policies)

KEY OUTPUT(S):

Organization's standards policy

4.3 Establish process for employee compliance with codes of conduct

- Communicate changes to codes of conduct to employees (such as annual online training on workplace policies and procedures, updated manual at annual review)
- Obtain employee and/or volunteer agreement to codes of conduct (such as by email, paper sign-off, electronic signature)

KEY OUTPUT(S):

Communication procedure for policy updates

Agreement form

5 Manage individual performance

Importance

The impact of mastering these competencies is:

- Individuals can trace their tasks and objectives to the annual and strategic plans
- Individuals are given a clear picture of how they are performing
- Individuals are given an opportunity to improve performance

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

5.1 Establish a process for reviewing individual performance within organization

- Identify performance assessment approaches (such as peer evaluations, 360 feedback, web-based questionnaires, performance rating scales, formal annual reviews, post-project debrief)
- Develop performance review form (such as online form, paper form, survey tool)
- Determine frequency of performance feedback cycle (such as weekly, bi-weekly, monthly, quarterly, annual; formal - completed form submitted into employee file - versus informal - ongoing unrecorded conversations)

KEY OUTPUT(S):

Performance review template
Feedback questionnaire

5.2 Establish individual job performance expectations aligned with annual operational plan

- Identify tasks required to achieve operational plan (such as identify specific activities for each individual employee to accomplish goals)
- Develop performance objectives in collaboration with employee (such as (Specific, Measurable, Achievable, Relevant, and Time-based (SMART) goals, balance scorecard, reports, regular meetings, status updates)

KEY OUTPUT(S):

Balanced scorecard

5.3 Support individual performance

- Establish mechanism for providing regular feedback (such as regularly scheduled meetings, post-project debrief, informal feedback, written feedback)
- Identify opportunities to recognize accomplishments (such as formal thank you, raise, gift, public acknowledgement, informal or formal training, coaching, job shadowing, secondment, promotion, lieu time, sabbatical)
- Develop action plan for underachievement of objectives (such as communication with employee, corrective action, training, transfer, reassignment, type of termination)

KEY OUTPUT(S):

Performance feedback documentation

6 Manage teams

Importance

The impact of mastering these competencies is:

- Teams function effectively
- Progress as a team is tracked and can be addressed
- Individuals are held accountable to the team

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

6.1 Establish behaviour expectations

- Identify expectations in collaboration with team (such as what behaviours need to be regulated, expectations)

KEY OUTPUT(S):

Team charter

6.2 Identify team goals

- Identify key team objectives tied to annual operating plan (such as key performance indicators/key responsibility areas tied to strategic plan and annual operating plan)
- Establish collaboration expectations (such as active participation in meetings, timely responses to emails/questions, document efforts)

KEY OUTPUT(S):

Performance measures

6.3 Track progress

- Evaluate team progress (refer to established team deliverables and timelines)
- Identify format of progress reports (such as verbal report, email report, database update, slack)
- Identify frequency of progress reports (such as weekly, bi-weekly, monthly, quarterly, annual)
- Identify objectives at risk

KEY OUTPUT(S):

Progress feedback documentation

7 Manage change

Importance

The impact of mastering these competencies is:

- Resistance to change is minimized
- Change initiatives are successful

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

7.1 Define change agenda

- Frame business case for change
- Scope change
- Determine outcomes and measures
- Create a vision for the change

KEY OUTPUT(S):

Documentation of change plan

7.2 Plan change

- Ensure required resources to manage change
- Gain board and leader alignment on agenda
- Set project governance
(such as structure, meetings)
- Identify all stakeholders
- Determine impacts of change
- Assess risks
- Create contingency plans to mitigate risks

KEY OUTPUT(S):

Change plan parameters

7.3 Implement change

- Determine people change requirements
(such as mindsets, routines, behaviours)
- Develop change plan including milestones
- Communicate change vision
- Ensure stakeholders are informed and engaged
- Monitor progress
- Remove barriers to progress
- Address sources of resistance
- Validate that people are sufficiently prepared to adopt change
(based on attitude, knowledge, skill)

KEY OUTPUT(S):

Project management change plan

7.4 Sustain change

- Assess degree of adoption
- Address sources of resistance
- Track benefits versus business case
- Assess potential need for ongoing support
- Acknowledge and reward project team

KEY OUTPUT(S):

Project evaluation template

8 Conduct ongoing personal leadership development

Importance

The impact of mastering these competencies is:

- Ongoing improvement as a leader

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

8.1 Determine personal leadership capacity

- Conduct independent assessment
- Identify individual goals
- Identify intersection of individual goals and the organization's strategic goals
- Develop leadership plan include items such as training, secondments, job shadowing, promotion

KEY OUTPUT(S):

Template for leadership plan

8.2 Invite feedback

- Establish performance assessment process
- Develop feedback protocol
(such as surveys, conversation, email, post-mortem)
- Evaluate success of development plan

KEY OUTPUT(S):

Template for evaluation of leadership plan

Manage Operations

Competencies and supporting competencies

You'll find the key skills as well as key outputs for each of these supporting competencies on the following pages.

1 Manage day to day financials

- 1.1 Monitor cash flows
- 1.2 Monitor investments
- 1.3 Track actual revenues and expenses against budget
- 1.4 Adjust expenses and activities as required
- 1.5 Communicate financial information to stakeholders

2 Manage an annual external financial audit or review engagement

- 2.1 Determine appropriate level of financial assurance needed for organization
- 2.2 Develop internal process for audit or review engagement
- 2.3 Develop action plan to address audit or review engagement findings
- 2.4 Support selection and periodic review of the audit firm

3 Manage facilities

- 3.1 Assess facility
- 3.2 Conduct facility needs assessment
- 3.3 Identify opportunities to optimize facility
- 3.4 Develop action plan for facility management

4 Manage equipment

- 4.1 Conduct equipment inventory
- 4.2 Conduct equipment needs assessment
- 4.3 Identify opportunities to improve equipment

5 Manage technology

- 5.1 Identify the organization technological scope of need
- 5.2 Audit current technology use
- 5.3 Conduct gap analysis of technology processes
- 5.4 Implement technological improvements within current infrastructure
- 5.5 Implement technological improvements beyond current infrastructure
- 5.6 Establish continuous improvement plan

6 Develop operational practices

6.1 Define operational practices

6.2 Identify external authorities related to operational practices

6.3 Identify internal authorities related to operational practices

6.4 Document operational practices

6.5 Implement operational practice

1 Manage day to day financials

Importance

The impact of mastering these competencies is:

- Clear picture of financial state of the organization
- Financial obligations are met

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

1.1 Monitor cash flows

- Identify opening cash balance
- Identify projected cash inflows
- Identify projected cash outflows
- Evaluate ending cash position to determine surplus, deficit or zero balance
- Determine action plan

KEY OUTPUT(S):

Approved cash flow statement

1.2 Monitor investments

- Identify current investment policy
- Verify investments comply with investment policy
- Evaluate if there is a need to change the investment policy
- Obtain board approval for investment policy

KEY OUTPUT(S):

Optimal return on investments

1.3 Track actual revenues and expenses against budget

- Determine specific revenue and expense accounts to be tracked
- Determine timeline for review of revenues and expenses (weekly, monthly, quarterly)
- Analyze variances in report to identify where action is required

KEY OUTPUT(S):

Budget

Financial statements

1.4 Adjust expenses and activities as required

- Develop action plan to manage variances of actual versus budgeted financial results
- Implement action plan with management and staff

KEY OUTPUT(S):

Audited financial statements

Sufficient cash flow to meet financial obligations

1.5 **Communicate financial information to stakeholders**

- Determine reporting requirements (such as audience, data, reporting schedule)
- Distribute reports

KEY OUTPUT(S):

Statement of financial position

Cash flow statement

Income statement including variance analysis

Investment report

2 Manage an annual external financial audit or review engagement

Importance

The impact of mastering these competencies is:

- Organization is financially transparent to members and stakeholders
- Organization given an opportunity to improve processes and procedures based on auditor recommendations

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

2.1 Determine appropriate level of financial assurance needed for organization

- Identify circumstances where notice to reader or compilation engagement is appropriate (no audit opinion or assurance provided)
- Identify circumstances where review engagement is appropriate (includes no audit opinion but financial data is reviewed)
- Identify circumstances where audit is appropriate (audit opinion provided according to generally accepted auditing standards)

KEY OUTPUT(S):

Report to board whether review or audit is required

2.2 Develop internal process for audit or review engagement

- Identify roles and responsibilities of staff around audit or review engagement process (such as who must be involved, timeline)
- Establish audit or review engagement timeline in collaboration with accounting staff and external auditors
- Confirm accounting staff have developed audit checklist
- Confirm staff are aware of responsibilities in preparation for and during audit or review engagement

KEY OUTPUT(S):

Audit planning meeting agenda

Audit checklist

2.3 Develop action plan to address audit or review engagement findings

- Document all auditor recommendations in internal files
- Communicate to relevant staff changes to be made in their areas
- Follow up with staff prior to next year-end audit to ensure changes have been implemented

KEY OUTPUT(S):

Template for follow-up of audit or review engagement findings

2.4 Support selection and periodic review of the audit firm

- Compile list of audit firms from other organizations of similar size and mandate to your organization for review
- Send out Requests for Proposals (RFPs) to a number of firms (usually 3-5), providing them with deadline for submission
- Identify components of RFP
(such as purpose of audit, examination of the annual financial statements, background information, project specifications (scope, timeframe, auditor staffing), submission requirements and selection criteria)
- Review RFPs received and send to audit committee for comments
- Request Audit Committee provide shortlist of audit firms to consider
- Interview shortlist of audit firms (ask for partner and manager)
- Check references of short-listed auditing firms
- Make recommendation to audit committee
- Audit committee reviews recommendation from staff and if they agree, should recommend to council/governing body to hire audit firm
- Council approves audit firm to be hired
- Selected audit firm is informed
- Council appoints auditor for relevant fiscal year

KEY OUTPUT(S):

Auditor engagement

3 Manage facilities

Importance

The impact of mastering these competencies is:

- Organization has the space required to meet objectives

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

3.1 Assess facility

- Identify terms of tenancy agreement
(such as duration of lease, tenancy responsibilities, insurance needs)
- Identify existing space utilization
(such as how existing space is being used, need for repairs)
- Identify facility requirements
- Identify statutory requirements

KEY OUTPUT(S):

Floorplan
List of requirements

3.2 Conduct facility needs assessment

- Determine stakeholder satisfaction with facility (needs assessment)
- Conduct facility gap analysis
(such as unmet statutory requirements, gap between space and requirements)

KEY OUTPUT(S):

Report on gap analysis

3.3 Identify opportunities to optimize facility

- Determine available budget for improvements
(such as grants, leasehold improvement funds, reserve funds, planned expenditures for fiscal year)
- Identify recommendations from needs assessment
- Determine action plan

KEY OUTPUT(S):

Checklist of changes needed

3.4 **Develop action plan for facility management**

- Create maintenance checklist
- Identify individual(s) responsible for facility management
(such as staff person, external contractor, building management, leasor)
- Establish process for reporting problems
(such as incidents, repair ticket, report to main contact within staff who deals with building management, individuals who have specific needs)
- Identify action plan for addressing problems

KEY OUTPUT(S):

Facility improvement plan

4 Manage equipment

Importance

The impact of mastering these competencies is:

- Organization has the equipment needed to fulfill its objectives

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

4.1 Conduct equipment inventory

- Catalogue all equipment owned or leased
(such as desks, chairs, tables, computers, monitors, telephones, photocopiers)
- Identify terms of service agreements
(such as extended warranties)

KEY OUTPUT(S):

Equipment list
Equipment amortization schedule

4.2 Conduct equipment needs assessment

- Determine suitability of equipment
(such as gather data on stakeholder equipment needs, solicit input on possible improvements)
- Conduct equipment gap analysis
(such as unmet requirements, gap between equipment and requirements)

KEY OUTPUT(S):

List of required equipment

4.3 Identify opportunities to improve equipment

- Determine available budget for improvements
- Create action plan
(such as what improvements will be made, budget, timelines, implementation)

KEY OUTPUT(S):

Equipment Improvement action plan

5 Manage technology

Importance

The impact of mastering these competencies is:

- Organization has the systems in place to meet objectives
- Members and stakeholders can engage with the organization effectively

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

5.1 Identify the organization technological scope of need

- Identify key priorities in annual plan that require technological support
- Map out desired technological outcome

KEY OUTPUT(S):

Technology roadmap

5.2 Audit current technology use

- Identify tools in use
(such as software packages, additional tools – website, social media)
- Identify users
(such as internal users, end users, members, non-members)
- Identify level of administration authority for each type of user
(such as levels of permission for each user type)
- Map current technology processes
(such as process maps for member renewal, event registration)

KEY OUTPUT(S):

Technology audit report

5.3 Conduct gap analysis of technology processes

- Identify processes that meet organization objectives
- Identify areas for improvement
(such as redundant, duplicate processes and those that don't meet organization goals)
- Identify unmet technological needs

KEY OUTPUT(S):

Gap analysis

5.4 Implement technological improvements within current infrastructure

- Address processes that can be immediately improved
(such as eliminate redundant and duplicate processes, introduce new processes)

KEY OUTPUT(S):

New process documentation

5.5 Implement technological improvements beyond current infrastructure

- Select technological solutions
(such as scope of work, potential solutions, budget requirements, potential vendor/reseller)
- Develop implementation plan
(such as timelines, key responsibilities, project plan)
- Implement new technologies

KEY OUTPUT(S):

Implementation plan

5.6 Establish continuous improvement plan

- Develop internal process to monitor effectiveness of technology
(such as how frequently technology will be assessed, stakeholders, metrics, outcomes, changes to scope of need)

KEY OUTPUT(S):

Database reports for use in decision-making

6 Develop operational practices

Importance

The impact of mastering these competencies is you:

- Clear documentation supports staff in doing their work

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

6.1 Define operational practices

- Identify operational policy
- Identify operational process
- Identify operational procedure

KEY OUTPUT(S):

Policies and procedures

6.2 Identify external authorities related to operational practices

- Identify regulations pertaining to operations
(such as non-profit corporations act, provincial legislation, special legislation, registered charities act, societies act, Occupational Health and Safety, Provincial acts, Workers Compensation Board, Personal Information Protection and Electronic Documents Act PIPEDA) (Canadian Anti-Spam Legislation (CASL))
- Identify standards pertaining to operations
(such as accounting standards, certification standards)
- Identify additional obligations
(such as charities restrictions, restricted funds, grant restrictions)

KEY OUTPUT(S):

N/A

6.3 Identify internal authorities related to operational practices

- Identify bylaws pertaining to operations
(such as bylaws prohibiting electronic voting making a virtual AGM impossible)
- Identify board policies pertaining to operations
(such as certification, member renewal, code of conduct, member engagement standards)
- Identify organizational values that pertain to operational practices
(such as stated core values of the organization, mission, vision)

KEY OUTPUT(S):

Bylaws
Policies

6.4 Document operational practices

- Identify practices that require documentation (such as areas of risk, type of practice)

KEY OUTPUT(S):

Processes
Procedures
Training manuals
Policies
Job aids
Business rules
Staff manual
Board manual

6.5 Implement operational practice

- Identify responsibility for practice (such as CSO, board member, department manager, individual employees)
- Identify authority for practice (such as level of authority, if the practice can be overridden, how to escalate issues)
- Establish mechanisms to ensure compliance (such as employee sign off, database restrictions, banking rules)
- Establish operational practice review (such as semi-annually, annually, bi-annually)

KEY OUTPUT(S):

Compliant policies and procedures documented
Compliant processes streamlined

Deliver Value

Competencies and supporting competencies

You'll find the key skills as well as key outputs for each of these supporting competencies on the following pages.

1 Collect evidence-based data

- 1.1 Identify data sources
- 1.2 Identify research needs
- 1.3 Review data

2 Identify needs of segments

- 2.1 Refine segments
- 2.2 Identify opportunities to provide value to segments

3 Conduct continuous improvement of organizational offerings

- 3.1 Evaluate existing organizational offerings
- 3.2 Develop new products or services based on identified needs
- 3.3 Develop action plan for products and services

1 Collect evidence-based data

Importance

The impact of mastering these competencies is you:

- Assumptions are supported by data
- Organization has clear picture of what members and stakeholders value

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

1.1 Identify data sources

- Identify audience characteristics

KEY OUTPUT(S):

Member survey

1.2 Identify research needs

- Identify research objectives
(such as membership satisfaction with services, price sensitivity, requests for more services)
- Identify type of research method
(such as formal surveys, phone calls, face-to-face conversations, focus groups, email surveys, suggestion boxes, discussion forums)
- Identify frequency of research
- Identify outcome of research
(such as change to product or service, introduction of new product)
- Conduct research

KEY OUTPUT(S):

Research Plan

1.3 Review data

- Identify opportunities
- Identify gaps
- Identify trends
- Identify patterns

KEY OUTPUT(S):

Report on research findings

2 Identify needs of segments

Importance

The impact of mastering these competencies is:

- Staff is focused on the stated needs of members and stakeholders

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

2.1 Refine segments

- Confirm link of each stakeholder group to strategic plan or priorities
- Create personas
(such as membership categories, type of member, student, non-member, consumer, government official)

KEY OUTPUT(S):

Personas of each stakeholder group

2.2 Identify opportunities to provide value to segments

- Review research data
(such as opportunities, gaps, trends, patterns)
- Define opportunity
(such as thought leadership (research reports, conference presentations), affinity programs, education courses, training, advocacy and government relations)
- Articulate value proposition

KEY OUTPUT(S):

Business plan

Business case

3 Conduct continuous improvement of organizational offerings

Importance

The impact of mastering these competencies is:

- Product and service offerings are continuously improved
- Poorly performing products and services are retired

Supporting competencies, skills, and key outputs

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold) and contribute to the key outputs.

3.1 Evaluate existing organizational offerings

- List organizational offerings (such as membership categories, products, services, benefits, affinity programs)
- Conduct review of each product or service (such as alignment with strategic priorities, feedback from stakeholders, benchmark against comparable offerings)
- Conduct cost benefit analysis of each product or service (such as non-financial value of product/service, revenue impact of product/service)
- Identify next steps for each product or service (such as retire poorly performing products/services, opportunities to improve)

KEY OUTPUT(S):

List of organizational offerings
Cost benefit analyses
Recommendations for next steps

3.2 Develop new products or services based on identified needs

- Approve business case for new products or services (such as cost of development, development plan)

KEY OUTPUT(S):

Business case(s)

3.3 Develop action plan for products and services

- Establish performance metrics for all products or services (such as revenue target, satisfaction level, number of participants, market penetration, member recruitment rate, member retention)
- Approve promotional strategy (such as target audience, key messages, communication mechanism, communication plan, and marketing plan)
- Evaluate product or service performance against performance metrics

KEY OUTPUT(S):

Action Plan