



OneFPA Network Beta Test Assessment Report | Year-End 2020

A report provided by the OneFPA Transition Task Force.

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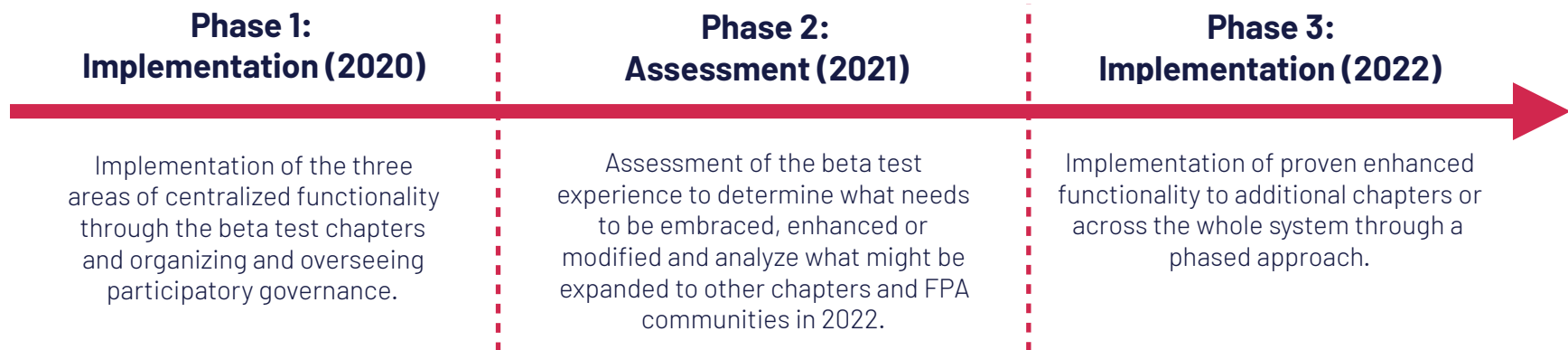
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Three Phases of the OneFPA Network

The OneFPA Network is a transformative reorganization of the Association that unites FPA and its communities through greater alignment and integration to support a more robust member experience. In the first year of the three-year implementation of the OneFPA Network vision and plan, we are focused on implementing the three areas of centralized functionality through 11 beta test chapters and organizing and overseeing participatory governance. While the pandemic's impact was felt throughout the FPA community and attention had to be paid to reducing that impact, foundational work was done through year one (2020) to begin implementing the OneFPA Network plan in the areas of staffing and technology. There are three planned phases for this work:



Changes in staff leadership and a reevaluation of the technology needed to implement centralized financial reporting prudently have delayed implementation in this area. With a new chief financial officer in the fold, this will be a focus area for continued implementation in 2021, along with other critical technology tools and resources.

Assessing Progress Made in 2020

Three core areas of year-one implementation are being assessed in this report based on an assessment plan matrix approved by the OneFPA Transition Task Force (right). They are Technology Adoption, Cultural Improvement and Service/Support. This assessment is supported by various data and feedback inputs, including surveys, available data and qualitative feedback received from critical audiences (beta test chapter leaders and executives, Central Office Staff, OneFPA committees, among others).

An initial survey exploring ‘Cultural Improvement’ was fielded in April 2020. A second survey was fielded in November 2020, which indicates how the culture and collaboration have improved between the beta test chapter executives/leaders and Central Office staff. While 2020 was a year full of challenges, we will at least ascertain if our efforts have more closely connected our leaders and staff.

The ‘Technology Adoption’ assessment is based on a series of survey questions posed to beta test chapter executives as part of the November survey. These questions explored the various tools implemented in 2020 and whether they support/improve their work.

In 2020, the FPA Central Office implemented a web-based ticketing system (Cayzu) to help evaluate and expedite service requests from beta test chapters and other stakeholders. The data collected from this system will help us determine if ‘Service/Support’ has improved over the year.

AREA	04 2020	01 2021	02 2021	03 2021	04 2021
Qualitative Data	✓	✓	✓	✓	✓
Technology Adoption	✓	✓	✓	✓	✓
Cultural Improvement (Beta Chapters)	✓		✓		✓
Cultural Improvement (Central Office)	✓		✓		✓
Service and Support (Cayzu)	✓	✓	✓	✓	✓
Member Recruitment, Retention, Composition			✓	✓	✓
Member Satisfaction (NPS Score)			✓		✓
Program Impact (Beta Chapters)			✓	✓	✓
Financial Impact (Beta Chapters)			✓	✓	✓
Efficiency Impact (Beta Chapters)			✓	✓	✓
Volunteer Impact (Beta Chapters)			✓	✓	✓

Summary

The first year of the OneFPA Network beta test marked the beginning of implementing the three areas of centralized functionality. Throughout the year, strides were made where we saw the benefits of collaboration, integration and alignment. And as we begin year two of the beta test, we have identified critical areas for improvement and opportunities to build on already realized successes. This report provides some metrics for the beta test from year one and is written to simply provide the information, but the OneFPA Transition Task Force would like to offer a few insights they have seen from the past year.

The Pandemic's Impact: 2020 was unlike any other year for FPA and the chapters. Business as usual was not possible. FPA staff, chapter executives and chapter leaders had to cope with the pandemic's challenges to ensure the organization was moving forward and the needs of members were served. Prioritizing efforts to stabilize the organization at all levels did not prohibit the organization from engaging in the beta test but did force everyone involved to focus on those elements that were easier to implement.

Organizational Challenges Are Priority: While 11 chapters are part of the beta test and are fully invested in the work being done, ongoing challenges of membership growth, partner revenue and online meetings are top of mind for chapter leaders. Comments from chapter leaders (November comments) on page 19 of this report demonstrate where they are focused today. The issues they touch on have less to do with the OneFPA Network beta test and are more about the current challenges of the Association. With that said, the OneFPA Network's purpose is to realize better integration and alignment between FPA and the chapters where the issues in those comments from chapter leaders can be addressed and resolved.

Greater Collaboration = Better Culture: The biggest win from the first year of the beta test is how closer collaboration improves the organization's overall culture. We have seen the benefits of what is possible when barriers are removed and closer collaboration occurs. Beta test chapter executives have been working to support each other throughout the pandemic. Joint events have been held where all beta chapters shared in the work and received a direct benefit. We started to see the impact Central Office staff and chapter executives working together can have on members. Building off this collaboration is year two of the beta test is a priority.

Participatory Governance is Underway: Through the launch of the OneFPA Advisory Council and the OneFPA Advisory Council Executive Committee, more chapter voices are being heard by the FPA Board of Directors on those matters of pressing concern to chapters and the Association. In 2020, approximately 70% of FPA chapters offered a representative to the Council. Going into 2021, nearly 90% of all FPA chapters have designated representatives. And to increase engagement among the Council, six meetings will be held in 2021 to increase the frequency and depth of feedback from the Council to the Board of Directors and staff.

Cultural Improvement

Beta Chapter Executives and FPA Central Office Staff
Sentiment | April–November 2020

Cultural Improvement: Beta Chapter Executives

An initial survey was fielded in April 2020 with 10 respondents and again in November 2020 with 11 respondents to determine whether or not aspects of centralized functionality have improved the culture and collaboration between beta chapter executives and Central Office staff. **Due to the limited respondent audience, we are using actual response counts rather than percentages.**

	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020
	STRONGLY AGREE		GENERALLY AGREE		NOT SURE		GENERALLY DISAGREE		STRONGLY DISAGREE	
I'm spending my time doing things that make a meaningful difference for our members.	2	3	5	7	2	1	1	0	0	0
I'm making better decisions for my chapter and our members.	2	7	5	2	2	2	1	0	0	0
I am receiving the training I need to effectively utilize the new tools and systems.	1	2	7	7	2	2	0	0	0	0
Overall, the beta test process is running smoothly.	2	3	6	6	2	2	0	0	0	0
The new tools and systems are a worthwhile improvement for my chapter.	2	5	6	3	2	3	0	0	0	0
I'm knowledgeable about what's happening at FPA as a whole.	2	2	6	3	2	5	0	1	0	0
We're true partners in a well-coordinated effort to serve members.	3	1	5	6	2	2	0	2	0	0
My voice is being heard by FPA leadership.	4	2	6	4	0	4	0	1	0	0
FPA leadership and Central Office staff have our best interests at heart.	7	---	2	---	1	---	0	---	0	---
FPA volunteer leadership has our best interests at heart.	---	6	---	2	---	3	---	0	---	0
FPA Central Office staff has our best interests at heart.	---	2	---	5	---	2	---	1	---	0
FPA is consistently delivering high value to members.	---	1	---	6	---	4	---	0	---	0

Cultural Improvement: Beta Chapter Executives

Metrics of Note

When reviewing the data from April 2020 and comparing it to data collected in November, a few areas are worth exploring to see if these issues can be addressed in year two. Those are highlighted in red on the table on the preceding page, which we will also analyze here.

	APRIL 2020	NOV 2020
	STRONGLY AGREE	
I'm making better decisions for my chapter and our members.	2	7

One of the goals of making chapter staff part of the Central Office staff was to help support them in doing their work for members locally. A jump in beta chapter executives strongly agreeing that they are making better decisions for their chapters is an example of the success we need to learn from in year two and identify ways to build on it.

	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020
	GENERALLY AGREE		NOT SURE		GENERALLY DISAGREE	
I'm knowledgeable about what's happening at FPA as a whole.	6	3	2	5	0	1

While beta chapter executives are saying they are making better decisions, they make those decisions while feeling like they are not aware of what is happening in FPA as they were in April. With nearly half of the beta chapter executives unsure if they know more or less, the Association has work to do to ensure chapter staff is aware of what is transpiring at FPA, which can only increase our alignment and collaboration quality.

Cultural Improvement: Beta Chapter Executives

Metrics of Note Continued

	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020
	STRONGLY AGREE		GENERALLY DISAGREE	
We're true partners in a well-coordinated effort to serve members.	3	1	0	2

More than 20% of beta chapter executives are less likely to say they strongly agree that they are true partners in serving members, and nearly 20% say they generally disagree that they are partners. Any number of factors can be attributed to this, but it is safe to assume that the less aware beta chapter executives are about what is happening at FPA, the less they will feel like they are partners in serving members.

Further opening lines of communications and soliciting input from beta chapter executives on issues that may impact chapters should be considered before decisions are made.

	APRIL 2020	NOV 2020	APRIL 2020	NOV 2020
	STRONGLY AGREE		GENERALLY AGREE	
	4	2	6	4
	NOT SURE		GENERALLY DISAGREE	
My voice is being heard by FPA leadership.	0	4	0	1

When the survey was first fielded in April, all beta chapter executives said they either generally or strongly agreed that their voice was being heard by FPA leadership. Seven months later, that sentiment has changed dramatically, with only half of beta chapter executives generally or strongly agreeing with that statement. Now, four are unsure, and one now says they generally disagree.

As already stated, we need to open lines of communications and ensure opinions of beta chapter executives are being considered in the Association's decision-making.

Cultural Improvement: Beta Chapter Executives

Comments provided by beta chapter executives from both the April and November surveys provide meaningful insight into why they feel the way they do and uncover important considerations for further improving our culture in year two.

Comments From Chapter Executives: April 2020

- “Truly see the effort on the leadership and staff to work together.”
- “I am getting far too many emails that do not apply to me as a beta test chapter executive. There are clearly things that don't pertain to me, but I still have to go through them all, which is so time consuming.”
- “I am curious if the beta tests will be curbed, halted, etc., because of the current world events. It would be nice to hear about the boards plans for the beta tests moving forward.”
- “I have enjoyed the process thus far, and greatly appreciate having the FPA staff and other executives as a resource, especially with all going on. I look forward to continuing the process.”
- “What membership efforts happen on the national level and the chapter level should continue to be refined, and would benefit if they could be more collaborative between national and chapters. Partnership is a sensitive topic and a thorny circumstance if we want to truly integrate/ collaborate between national and chapters. Approaching it openly has been great. Reducing siloed information/activities is making progress generally but partnership has been a little murky.”
- “At this point, beta test changes and COVID-19 changes are all kind of muddled. I appreciate the many efforts of home office staff to make us feel welcome. I think we have had a barrage of staff pet projects fired at us without much consideration about what we actually need or have the time to do. Kind of feel like if staff is short on bandwidth, someone must say, ‘Hey, let’s get the chapter executives to do it.’”

Comments From Chapter Executives: Nov. 2020

- “I have been disappointed with the lack so far of strategic alignment in the areas of membership, particularly member communications— everything from emails to drives and other messaging. I believe chapter partnerships will suffer strongly the longer we put off a more aligned approach: we are hearing that the FPA relationship is a headache.”
- “The beta test team of chapter executives has been an absolute gift and a tremendous collaborative success. It is by far the best part of the beta test to date and a huge win for all of us. Working collaboratively with a team of colleagues has elevated the work I am able to do with my chapter and made me more effective and impactful as an association executive.”
- “It’s been an overall good experience, I’ve learned a lot but have a lot more to learn.”
- “The collaboration with other chapters is the best part. Breaking down silos has started, but isn’t easy. Becoming true partners needs everyone’s buy-in, and goals for national staff that don’t conflict with creating those collaborations with chapters. Sharing partnership funds will be one of the stickiest hurdles if we go that far, but we’ve seen openness to the idea. Membership recruitment and retention efforts should be coordinated with chapters’ efforts. Now the member services staff is gone, which doesn’t make me hopeful that national will focus on the member experience instead of focusing on cutting costs. We don’t need scripts. We need inspired leaders who are passionate about FPA.”
- “Our chapter is in a far better position in 2020 because we are a beta chapter. Because of the resources provided, we are better able to serve our members.”
- “The best experience! Excited for 2021. Hope that we still get to work together after the beta test is finished!”

Cultural Improvement: FPA Central Office Staff

The initial survey in April 2020 of FPA Central Office staff asked nine respondents to provide a rating on a 1 to 5 scale (1=strongly disagree, 5=strongly agree) on a series of questions about culture. The survey in November of 10 respondents was modified to better align with the beta test chapter executives' survey in terms of questions asked and answer choices. Also, only staff who interact with chapters regularly as part of their job were asked to complete the survey.

April 2020 Survey of FPA Central Office Staff

	Staff 1	Staff 2	Staff 3	Staff 4	Staff 5	Staff 6	Staff 7	Staff 8	Staff 9	Avg.
Chapter staff are effectively mastering the new tools and systems.	N/A	3	3	2	N/A	N/A	4	3	3	3
Program scheduling conflicts have disappeared.	3	3	N/A	N/A	3	2	N/A	4	3	3
Interactions and inquiries from chapters have become more productive (fewer repeat queries).	4	3	4	3	4	1	3	4	4	3.3
We're true partners in a well-coordinated effort to serve members.	4	3	2	4	3	3	4	4	3	3.3
Our messaging and branding are consistently delivered/presented.	N/A	2	N/A	N/A	4	N/A	4	4	3	3.4
Overall, the beta test process is running smoothly.	4	4	4	4	2	2	4	4	3	3.4
Chapters are consistently delivering high value to members.	N/A	3	4	N/A	3	3	4	4	4	3.6
Average	3.8	3.0	3.4	3.3	3.2	2.2	3.8	3.9	3.3	3.3

Cultural Improvement: FPA Central Office Staff

The initial survey of FPA Central Office Staff asked respondents to provide a rating on a 1 to 5 scale (1=strongly disagree, 5=strongly agree) on a series of questions about culture. The survey in November was modified to better align with the survey of beta test chapter executives. **Due to the limited respondent audience, we are using actual response counts rather than percentages.**

November 2020 Survey of FPA Central Office Staff

	STRONGLY AGREE	GENERALLY AGREE	NOT SURE	GENERALLY DISAGREE	STRONGLY DISAGREE	N/A
I'm spending time doing things that make a meaningful difference for members from both a national and chapter perspective.	3	5	1	0	0	1
I'm making better decisions for our chapters and our members.	4	4	1	0	0	1
Chapter staff is receiving the training I need to effectively utilize the new tools and systems.	0	2	1	0	0	7
Overall, the beta test process is running smoothly.	1	4	3	0	0	2
The new tools and systems are a worthwhile improvement to support members.	1	1	3	0	0	5
I'm knowledgeable about what's happening at FPA and FPA chapters.	0	7	1	1	0	1
FPA Central Office and chapter staff are true partners in a well-coordinated effort to serve members.	2	4	2	1	0	1
My voice is being heard by FPA leadership.	2	4	2	0	0	2
FPA volunteer leadership has our best interests at heart.	1	4	1	0	0	3
FPA chapter executive staff has our best interests at heart.	4	3	1	1	0	1
FPA chapters are consistently delivering high value to members.	3	2	3	0	0	2

Cultural Improvement: FPA Central Office Staff

Metrics of Note

Since the Central Office staff survey's questions and format were changed to better align with the beta chapter executive survey, it isn't advisable to compare the data from the two time periods. However, there are some interesting pieces of data from the November survey worth exploring.

	STRONGLY AGREE	GENERALLY AGREE	NOT SURE
Overall, the beta test process is running smoothly.	1	4	3

While the survey was limited to those members of the Central Office staff who regularly engage with beta chapters, not all respondents are engaged in every beta test aspect. With this in mind, it is not surprising that three of the respondents are not sure if the process is running smoothly, but we need to do our best to ensure communication about the process includes staff.

	GENERALLY AGREE	NOT SURE	GENERALLY DISAGREE
I'm knowledgeable about what's happening at FPA and FPA chapters.	7	1	1

With seven Central Office staff saying they are (generally) aware of what is happening at FPA and FPA chapters, we are doing something right. However, one says they generally disagree. The fact there are people on staff who don't feel like they are aware of what is going on is a red flag that needs to be addressed going forward.

	GENERALLY AGREE	NOT SURE	GENERALLY DISAGREE
FPA Central Office and chapter staff are true partners in a well-coordinated effort to serve members.	4	2	1

When combined with those who say they strongly agree, six of the Central Office staff say that staff at both levels are true partners. The fact two aren't sure, and another one generally disagrees, begs the question, "What more can we do through the beta test to ensure all staff are working together as partners in serving members?"

Cultural Improvement: FPA Central Office Staff

Comments provided by Central Office staff from both the April and November surveys provide meaningful insight into why they feel the way they do and uncover important considerations for further improving our culture in year two.

Comments From Central Office Staff: April 2020

- “A need for more streamlined, focused communication is a common thread for the items I gave middle marks. Collaboration and good relationships among beta test chapter executives and some staff are emerging but we’re not yet fully coordinated.”
- “Interestingly, I found it difficult to generalize. Given my deep work with the betas, each is a completely unique experience.”
- “Some of our beta chapters are not using the tools that have been provided. I sense improvement in the trust and confidence between the Central Office and beta chapters. Repeat questions from a just a few beta chapters.”
- “I do believe that we’ve made progress, especially when it comes to communications and being able to connect with beta test chapter executives when they need assistance. The messaging and branding consistency has also improved, as the beta executives see communications at the same time as staff, and usually have a bit more time to prepare. I do still feel like we are in the dark on some things until the last minute in terms of beta test goals, timelines, etc. - I know we’re learning as we go, but having more of a concrete plan in place overall would help our team feel more prepared.”
- “I have minimal understanding of the work that the Beta Chapters are or are not doing. We don’t receive updates from them in staff meetings, so I find it difficult to complete this survey.”

Comments From Central Office Staff: Nov. 2020

Central Office staff completing the survey were asked to base their comments on year two of the beta test and ideas for collaboration with beta test chapters.

- “The Strategic Partnerships team can work with the chapters in helping them build better, more streamlined partnership packages. We can also help them secure more relationships.”
- “I may potentially need their involvement with a product marketing strategy (aka program evaluations), more to come as the idea is developed and pitched.”
- “Additional software training, integrated event registration, integrating chapter data with central office AMS and centralizing data collection/updates.”
- “Providing more opportunities for collaboration, putting some new all-chapter collaboration processes and requests in place, guiding best practices and providing useful resources, and navigating a partner-test program with the beta chapters specifically.”
- “We are looking at potentially working with the Foundation for Financial Planning on a technology platform that will make the tracking, planning, sign-ups, etc., for pro bono events easier. If we were to do this, we would obviously look to the beta chapters to test it out.”

Cultural Improvement: Alignment and Divergence

When reviewing both November 2020 surveys of beta test chapter executives and FPA Central Office staff, areas of alignment and divergence in sentiment on our cultural improvement are evident. These findings uncover challenges in our efforts and present opportunities for improvement. **Due to the limited respondent audience, we are using actual response counts rather than percentages.**

	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF
	STRONGLY AGREE		GENERALLY AGREE		NOT SURE		GENERALLY DISAGREE		STRONGLY DISAGREE	
BETA EXECS: I'm spending my time doing things that make a meaningful difference for our members. C.O. STAFF: I'm spending time doing things that make a meaningful difference for members from both a national and chapter perspective.	3	3	7	5	1	1	0	0	0	0
BETA EXECS: I'm making better decisions for my chapter and our members. C.O. STAFF: I'm making better decisions for our chapters and our members.	7	4	2	4	2	1	0	0	0	0
BETA EXECS: I am receiving the training I need to effectively utilize the new tools and systems. C.O. STAFF: Chapter staff is receiving the training I need to effectively utilize the new tools and systems.	2	0	7	2	2	1	0	0	0	0
BETA EXECS: Overall, the beta test process is running smoothly. C.O. STAFF: Overall, the beta test process is running smoothly.	3	1	6	4	2	3	0	0	0	0
BETA EXECS: The new tools and systems are a worthwhile improvement for my chapter. C.O. STAFF: The new tools and systems are a worthwhile improvement to support members.	5	1	3	1	3	3	0	0	0	0
BETA EXECS: I'm knowledgeable about what's happening at FPA as a whole. C.O. STAFF: I'm knowledgeable about what's happening at FPA and FPA chapters.	2	0	3	7	5	1	1	1	0	0
BETA EXECS: We're true partners in a well-coordinated effort to serve members. C.O. STAFF: FPA Central Office and chapter staff are true partners in a well-coordinated effort to serve members.	1	2	6	4	2	2	2	1	0	0
BETA EXECS: My voice is being heard by FPA leadership. C.O. STAFF: My voice is being heard by FPA leadership.	2	2	4	4	4	2	1	0	0	0

Cultural Improvement: Alignment and Divergence

Upon reviewing the data, there is some alignment between beta chapter executives and Central Office staff on a couple of questions. A vast majority of both beta chapter executives and Central Office staff agree to some extent that they are spending time meaningfully. While some are unsure, for the most part, both groups believe the process is running smoothly. However, more beta chapter executives believe the new tools and systems are worthwhile. And, while two of the beta chapter executives strongly agree they are more knowledgeable, far more are unsure than Central Office staff.

Metrics of Note – Alignment

	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF
	STRONGLY AGREE		GENERALLY AGREE		NOT SURE	
BETA EXECS: I'm spending my time doing things that make a meaningful difference for our members. C.O. STAFF: I'm spending time doing things that make a meaningful difference for members from both a national and chapter perspective.	3	3	7	5	1	1
BETA EXECS: Overall, the beta test process is running smoothly. C.O. STAFF: Overall, the beta test process is running smoothly.	3	1	6	4	2	3

Metrics of Note – Divergence

	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF	BETA EXECS	C.O. STAFF
	STRONGLY AGREE		GENERALLY AGREE		NOT SURE	
BETA EXECS: The new tools and systems are a worthwhile improvement for my chapter. C.O. STAFF: The new tools and systems are a worthwhile improvement to support members.	5	1	3	1	3	3
BETA EXECS: I'm knowledgeable about what's happening at FPA as a whole. C.O. STAFF: I'm knowledgeable about what's happening at FPA and FPA chapters.	2	0	3	7	5	1

Cultural Improvement

Beta Chapter Leaders

Sentiment | June–November 2020

Cultural Improvement: Beta Chapter Leaders

The initial survey of chapter leaders from beta chapters—fielded in June—asked 44 respondents to provide a rating on a 1 to 5 scale (1=strongly disagree, 5=strongly agree) on a series of questions about culture. In November, the survey of 29 respondents was modified to better align with the beta test chapter executives and Central Office staff surveys in terms of questions asked and answer choices.

June 2020 Survey of Beta Chapter Leaders

	Avg. Rating
My chapter's voice is being heard by FPA leadership.	4.2
My chapter is able to spend time doing things that make a meaningful difference for our members.	4.1
As a chapter leader, I can get the help I need when I need it.	4.1
FPA leadership and headquarters staff has our best interest at heart.	4.1
My chapter leaders and I are making better decisions for the chapter.	4.0
My chapter and FPA headquarters are true partners in a well-coordinated effort to serve members.	3.9
Overall, the beta test is running smoothly.	3.9
I am knowledgeable about what's happening at FPA as a whole.	3.8
Average Overall Rating	4.0

Cultural Improvement: Beta Chapter Leaders

The initial survey of beta chapter leaders asked respondents to provide a rating on a 1 to 5 scale (1=strongly disagree, 5=strongly agree) on a series of questions about culture. In November, the survey of 29 respondents was modified to better align with the survey of beta test chapter executives and Central Office staff surveys.

November 2020 Survey of Beta Chapter Leaders

	STRONGLY AGREE	GENERALLY AGREE	NOT SURE	GENERALLY DISAGREE	STRONGLY DISAGREE	N/A
I'm spending time doing things that make a meaningful difference for members.	21%	59%	21%	0%	0%	0%
I'm making better decisions for my chapters and our members.	24%	62%	14%	0%	0%	0%
I am receiving the training I need to effectively utilize the new tools and systems.	10%	21%	41%	7%	7%	14%
Overall, the beta test process is running smoothly.	10%	38%	31%	17%	0%	3%
The new tools and systems are a worthwhile improvement for my chapter.	10%	45%	34%	0%	3%	7%
I'm knowledgeable about what's happening at FPA as a whole.	10%	62%	10%	14%	0%	3%
We're true partners in a well-coordinated effort to serve members.	17%	38%	31%	7%	0%	7%
My voice is being heard by FPA leadership.	21%	45%	21%	7%	0%	7%
FPA volunteer leadership has our best interests at heart.	62%	24%	10%	3%	0%	0%
FPA Central Office staff has our best interests at heart.	38%	38%	17%	0%	4%	4%
FPA is consistently delivering high value to members.	24%	35%	21%	17%	0%	4%

Cultural Improvement: Beta Chapter Leaders

Metrics of Note

Since the survey questions and format were changed, comparing individual data points is not advisable. However, reviewing the data from the November survey reveals a few key findings that require exploration.

One consistency across all three surveys is there seems to be a reasonably high level of uncertainty. For example, all three groups were presented with the following statement: *Overall, the beta test process is going smoothly.* After a year of the beta test, nearly 20% of beta chapter executives, 30% of Central Office staff and 31% of beta chapter leaders are “unsure.” And on the statement about the *new tools and systems being a worthwhile improvement*, nearly 30% of beta chapter executives, 30% of Central Office staff and 34% of beta chapter leaders are “unsure.”

	GENERALLY AGREE	NOT SURE	GENERALLY DISAGREE
Overall, the beta test process is running smoothly.	38%	31%	17%

While nearly 50% of beta chapter leaders agree to some extent that the process is running smoothly, nearly a third are unsure and another 17% generally disagree. As mentioned above, the percentage ‘unsure’ is consistent with the other two groups, but no beta chapter executives or Central Office staff disagreed with the statement.

	GENERALLY AGREE	NOT SURE	GENERALLY DISAGREE
I'm knowledgeable about what's happening at FPA as a whole.	62%	10%	14%

With 62% of beta chapter leaders saying they generally agree with this statement, they are actually more in-line with the sentiment of Central Office staff (70%) than they are with beta chapter executives (27%).

Cultural Improvement: Beta Chapter Leaders

Comments provided by beta chapter leaders from both the June and November surveys provide meaningful insight into why they feel the way they do and uncover important considerations for further improving our culture in year two. These comments include all of the comments received from the surveys.

Comments From Beta Chapter Leaders: June 2020

- “I think you are doing a great job in a pretty challenging environment.”
- “In light of COVID, what are common chapter challenges that FPA can help us address. As volunteers, I feel we are limited in the depth and breadth of our analysis and research for solutions in a timely manner.”
- “Maybe I am not attuned to developments as much as I could /should, but I don’t have a clear understanding of the FPA resources and current initiatives.”
- “Our chapter executive is bogged down with FPA National calls that significantly take away time from her work to our chapter. I often feel like we are not really connected with FPA National and are sometimes ‘kept in the dark.’ I was also disappointed with the number of issues surrounding the new website, as that is how our members connect with our chapter and stay informed.”
- “The web page for new members to join the FPA has a few issues that if corrected, could result in a proper, easy-to-understand process.”
- “We are encouraged about the leadership change taking place and are happy the beta test will not be impacted. Our biggest concern is the number of hours of staff meetings our chapter executive is required to attend. We understand the need to have constant communication, but it does seem excessive.”
- “We have been very encouraged at the level of service and attentiveness in conducting our search for a new executive director! A big show of appreciation goes specifically to Cynthia Jackson for her help!”

Comments From Beta Chapter Leaders: Nov. 2020

- “I still believe FPA is disjointed in its identification of who our target members are and how we uniquely add value to that population. FPA could clarify and magnify a more succinct message and vision to its local leadership and empower them to achieve what matters most in the current environment: keeping members engaged and promoting strong partnerships with local vendors / sponsors. As the incoming president, I find myself asking myself a lot of questions that FPA should already have answered for me. Until that clears up, I will still carry the same level of frustration around the central leadership.”
- “Feedback from members has told us that they don’t always feel they are getting a high level of value through their membership.”
- “The pandemic, decline in membership and dramatic turnover in all levels of FPA national staff has created a sense of disarray and caused deliverables to slide. I do not believe the financial systems improvements will have great benefit to chapters. Assuring consistency of data and benchmarking will have much greater benefit for National.”
- “I am a multi-year volunteer. I was very excited about the various efficiencies we would all gain as One FPA. However, this year has really rattled my confidence in National FPA and makes me very hesitant to want to continue to volunteer. Our members speak loudly when they say they derive almost all of their value from the local chapter, local events, local networking. And yet, National keeps a large majority of dues and I am very unclear what there is to show for that. It seems like the financial trouble at National doesn’t end. The turnover is exhausting. I am burned out and discouraged.”
- “Training opportunities must be improved.”
- “So much is delivered at the local level, not sure of the full value prop from National.”

Technology Adoption

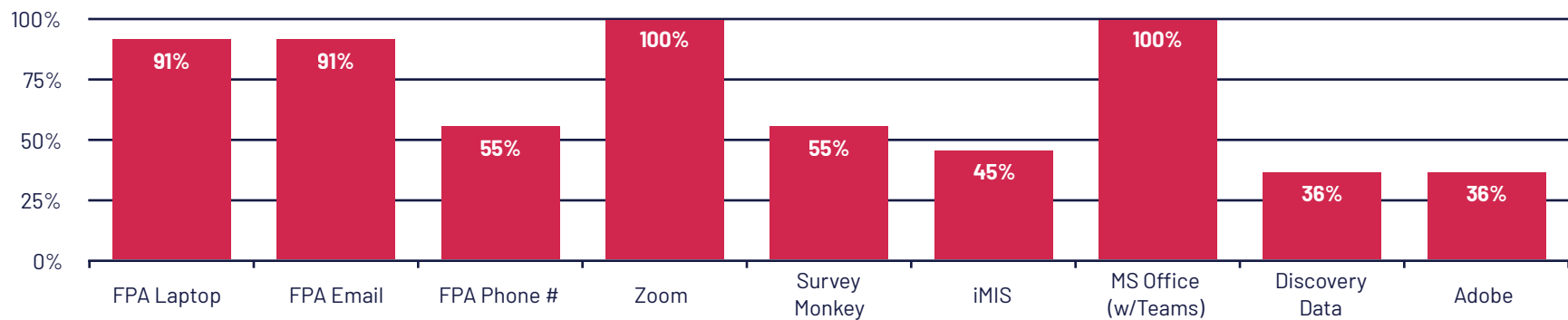
Beta Chapter Executives

Sentiment | November 2020

Technology Adoption: Beta Test Chapter Executives

As part of the November 2020 survey of 11 beta test chapter executives, a series of questions were asked about technology tools provided to the chapter executives to gauge their usage of the tools and the impact the tools are having on their work.

Which of the following FPA-provided resources are you using regularly?



How important are the following resources to the chapter's operations to do your daily work?

	I NEED THIS RESOURCE TO DO MY JOB	I COULD TAKE IT OR LEAVE IT	THIS DOES NOT HELP ME DO MY JOB
FPA Laptop	64%	27%	9%
FPA Email	73%	18%	9%
FPA Phone #	45%	27%	27%
Zoom	100%	0%	0%
Survey Monkey	64%	36%	0%
iMIS	82%	9%	9%
MS Office (w/ Teams)	90%	10%	0%
Discovery Data	60%	40%	0%
Adobe	60%	30%	10%

Service and Support

Beta Chapter Executives

Cayzu Ticketing System | March–November 2020

Service and Support: Cayzu Ticketing System

In March 2020, FPA Central Office staff implemented a new web-based ticketing system (Cayzu) to provide members, chapter leaders and chapter executives a tool for submitting service requests. While the system is intended to be used for virtually any request someone has for FPA, the beta test has provided a proving ground for the system. To date, the system has been primarily used by beta test chapter executives to submit tickets for technology-related questions and support. That will change in year two as chapter executives will be encouraged to use the system for any issue, concern or question.

The following chart only captures those issues submitted by beta test chapter executives from March through December 11. It is not exhaustive of all service requests since many requests are addressed outside of the Cayzu system by staff in other areas and departments. “Average time” is the average number of days elapsed from when a ticket is submitted to the time it is resolved.

	CHAPTER WEBSITE ISSUES		COMPUTER/SOFTWARE ISSUES		REPORTS ISSUES		MEMBER/MARKETING ISSUES		TOTAL	
	NUMBER ISSUES	AVG. TIME	NUMBER ISSUES	AVG. TIME	NUMBER ISSUES	AVG. TIME	NUMBER ISSUES	AVG. TIME	NUMBER ISSUES	AVG. TIME
MAR 2020	2	0.00	4	20.50	0	0.00	0	0.00	6	3.41
APR 2020	0	0.00	7	20.70	2	6.00	0	0.00	9	2.96
MAY 2020	9	4.1	0	0.00	0	0.00	0	0.00	9	0.45
JUN 2020	3	9.00	2	4.00	1	25.00	1	18.00	7	8.00
JUL 2020	8	1.25	1	7.00	1	79.00	2	3.50	12	7.56
AUG 2020	1	40.00	3	13.50	1	3.00	2	38.00	7	13.50
SEP 2020	8	6.25	2	22.00	1	7.00	0	0.00	11	3.20
OCT 2020	1	0.00	2	15.00	0	0.00	3	13.00*	6	4.66*
NOV 2020	4	9.00	1	1.00	0	0.00	1	18.00	6	4.66
DEC 2020	1	3.00	3	0.66	0	0.00	0	0.00	4	0.91
AVERAGE	3.70	1.96	2.50	4.17	0.60	20.00	0.90	10.05	7.7	4.99

*Elapsed time based on 1 of 3 complete service requests. Two are incomplete.

Examples and Anecdotes

Key Learnings from Real Experiences in 2020

Examples and Anecdotes: Key Learnings

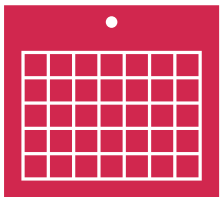
While 2020 was devoted to the initial implementation of the OneFPA Network plan and vision in collaboration with 11 beta test chapters, the pandemic's challenges required nimbleness and a willingness to pivot. 2020 was unlike any previous year, so we had to adapt to the new reality and make accommodations as needed. Still, as we review the year, we can point to several moments where we can see how a more integrated and aligned organization would be beneficial and those moments where efforts were not as successful. Either way, these moments provide critical learning opportunities as we embark on year two of the beta test.

Success: Collaborative Events



The 11 beta chapters collaborated on a webinar for all members from the chapters this past summer. Each of the chapter executives played a role in the event where they covered logistics, marketing, CE, technology, speaker coordination and production. This coordinated effort resulted in a program that attracted 430 registrants and 350 attendees. While several other chapters outside of the beta test attempted some collaboration around virtual programs this year, none were as successful as the beta chapters' program.

Success: Sponsor/Partner Programming



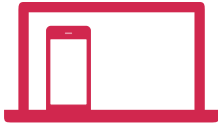
The need to provide meaningful value and engagement for partners and sponsors this year was critical for all beta chapters. To address the needs of a shared partner, FPA of Charlotte and FPA of Metro New York collaborated on a virtual program that highlighted the partner and provided them the exposure they were looking to generate.

Success: Peer-To-Peer Support



The pandemic posed challenges that not every chapter executive was prepared to address, including the change to virtual programs and events. Luckily, the beta test provided a close community of chapter executives who could lean on each other to navigate these challenges. One chapter executive, in particular, was able to lean on her peers—and members of the FPA staff—to help shift all planned programs to a virtual environment.

Success: Technology Support



The beta test calls for the implementation of various pieces of technology to support chapter operations and programs. Zoom has become critical to all of society in ensuring meetings and programs can be help virtually until in-person programming can resume. Zoom was also one of the first pieces of technology to be provided to all beta chapters at the beginning of the year, which proved invaluable as the chapters shifted their programming for the past year.

Learning: Intentional Communication Needed



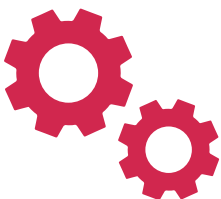
While FPA has taken steps to increase its communication with chapter leaders and chapter executives, the communication has fallen short of being intentional where both FPA's and chapters' needs are addressed. For example, when FPA announced that the Annual Conference was going virtual, beta chapters were not notified in advance of the announcement. This caused issues because the Annual Conference being virtual at a lower price point than a traditional in-person conference created competition between FPA and the chapters. Moving forward, FPA needs to proactively engage with chapter leaders in advance of decisions being made to programs so awareness can be provided and input gathered.

Learning: Better Planning for Integrated Promotions



We need to be mindful that chapters have their own planned schedules for programs and promotions, and any plan to seek chapter promotion of a 'national' program needs to take that into account. For example, during Thanksgiving Week, FPA ran a 'cyber promotion' on online education. Unfortunately, many chapters already had full promotion schedules for that week for their programs. Creating more awareness of what the Central Office and chapters have planned for promotions would help plan out opportunities for integrated promotions.

Learning: Openness and Candor About FPA's Future



FPA's operational challenges concern chapter leaders who want to know where the association stands and plans to overcome the challenges. While FPA has taken steps to be more transparent about operational issues (e.g., all financials are available on the website), there is a need to increase the direct communication and share strategies FPA is planning to employ and how chapters can be integrated into those plans. Of specific concern to chapters has been the finances, recent staff departures and lack of membership growth.



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