

— We Listened —

What steps did FPA take to ensure all stakeholders were engaged in providing feedback on the original draft plan?

Following the announcement of the OneFPA Network Draft Plan and vision at the Chapter Leaders Conference in November 2018, FPA engaged in a robust process to ensure the voices of all stakeholders were heard on what was being proposed. During that time, all chapter boards were proactively engaged to set up in-person or virtual Listening Tour meetings to learn about the vision and provide feedback. Additional meetings were held with other stakeholder groups, including chapter executives, members, NexGen leaders, corporate partners, and past FPA presidents. We also engaged in discussions through the All-Member Open Forum, through discussion forums on the OneFPANetwork.org microsite, and collected feedback via email.

FPA conducted a Listening Tour where meetings were held with chapter leaders. How was this conducted and how many chapter boards participated?

We communicated with every chapter board to schedule either an in-person or virtual meeting to explore the draft plan and collect feedback. These meetings involved both leaders from the FPA Board of Directors and staff. Feedback was collected by a management consulting firm, which provided the feedback to the OneFPA Transition Task Force for review. While not every FPA chapter opted to participate in a Listening Tour visit, the majority—77 of our 86 chapters (90%)—actively participated in the Listening Tour.

Why didn't every chapter board participate in the Listening Tour?

Chapter participation in the Listening Tour was encouraged, but not required. Chapters received communications encouraging their participation over multiple channels throughout the four-month Listening Tour. Each chapter decided individually if they would like to participate, who at the chapter would participate, and if the chapter wanted an in-person or virtual visit. The nine chapters that opted not to participate provided a variety of reasons, including that they were on board with the vision and wanted to wait for the next version of the plan to be released, they felt all their questions had already been answered through one of the feedback opportunities, or they didn't have time to participate because of other priorities.

Besides chapter leaders, were other stakeholders involved in the Listening Tour?

Virtual Listening Tour meetings were held with stakeholder groups in addition to FPA chapters, including chapter executives, members, NexGen leaders, corporate partners, and past FPA presidents. Feedback was collected at each of these meetings and shared with the OneFPA Transition Task Force.

How was feedback collected and who was responsible for reviewing the feedback to ensure the new plan incorporated the input from stakeholders?

Thorough notes were captured during each Listening Tour meeting by the Board leadership and staff in attendance, and delivered to a management consulting firm, which then provided this information to the OneFPA Transition Task Force for their review and analysis. The OneFPA Transition Task Force, which includes an equal representation of local and national leaders, was tasked with determining revisions needed to the original draft plan. All stakeholder feedback was considered in that process.

There was some direct criticism. How did FPA respond?

At no time did FPA leaders believe the original draft plan would be met with full acceptance by all stakeholders or that no changes would be made to the original plan. The draft plan represented a major transformational change for the entire organization—including nationally—and often change of this magnitude attracts a diverse set of opinions. FPA has welcomed alternate viewpoints and ideas and has engaged in robust dialogue with these individuals, privately and publicly.

Is FPA done listening to stakeholder input?

FPA continues to encourage all stakeholders to provide their ongoing thoughts, comments and constructive criticisms. As we enter a second phase of the feedback process through a 45-day comment period, it is FPA's sincere hope that all stakeholders will actively engage in providing feedback to shape and inform the final OneFPA Network plan. Additionally, the OneFPA Transition Task Force will develop the draft Master Services Agreement and Key Performance Indicators (KPIs) related to beta-test chapters during the 45-day comment period and will share them with FPA stakeholders for feedback from June 3 to July 1—prior to their dissemination on July 11 as part of the beta-testing application process.

— We Learned —

At a macro-level, what did FPA learn through the feedback provided by stakeholders?

We learned that our stakeholders—especially chapter leaders and members—are passionate about FPA and invested in FPA's success. We learned that there is a lot of misinformation, confusion and lack of knowledge of FPA's current programs and structure. We also learned that our members do value what FPA and our chapters do for them professionally and don't want that value to be diminished in any way. We learned that all stakeholders want chapters to be empowered to continue doing the great work they already do unencumbered by any changes that may take place and want to see the OneFPA Network vision adopted in a way that takes the necessary time to get it right.

Based on the feedback, do you think FPA would propose the same plan all over again or would FPA have taken a different approach to avoid the negative criticism?

The same original draft plan would have been proposed to stakeholders, since it was a varied and extensive group of FPA leaders who drafted the original plan to begin with. Based on the feedback, the vision of a more integrated, aligned association that best serves the needs of its members is still a relevant vision. While the original draft plan was met with a wide variety of feedback, it sparked a vibrant discussion about the future of our association and brought more voices to the table to envision our collective future. The purpose of sharing the original OneFPA Network Draft Plan and engaging in the Listening Tour was to initiate a robust system-wide conversation, which is exactly what occurred.

The original draft plan called for chapters to change their legal structures and become a part of one legal entity. What was feedback like on that provision?

Feedback was very direct and clear from many of our chapter leaders. They were concerned that the elimination of their separately incorporated legal status would compromise the autonomy chapters currently enjoy from a functional and programmatic standpoint. The intent of this provision was to simply better align and integrate the association functionally and culturally—not strip chapters of their autonomy. Despite this intent, the Second Iteration of the OneFPA Network Draft Plan removes this requirement and calls for deeper analysis of the legal structure issue throughout a beta-testing process.

What did FPA learn from the feedback regarding centralized accounting and finance?

While chapter leaders generally embraced more transparency and sharing of financial information for better strategic decision-making, they expressed their strong concern that centralizing accounting and finances would mean they would lose control over their budgets, reserves and programs that generate revenue. Throughout the Listening Tour, FPA leaders clarified the intent of accounting/finance centralization; however, chapter leaders asked for written assurances that they will maintain control in this area and that their reserves wouldn't be tapped by national for other purposes. We also heard that the local sponsor relationships with chapters should be supported and not diminished.

What did FPA learn from the feedback regarding centralized staffing?

Chapter leaders value their chapter executives and the important role they play in providing critical day-to-day support to their respective chapters. Concerns were expressed about the need for chapters to be able to manage the work of their chapter executive. Chapter leaders were clear that they want to be assured that their chapter executives would be working for their chapters and that they would continue to direct the executive's day-to-day activities. While there was consensus about the benefits of greater collaboration and cooperation to support the work of chapter executives, chapters wanted to be assured that they will have a direct say into any future hiring, firing or evaluation of their executive.

What did FPA learn from the feedback regarding centralized technology?

An improved technology infrastructure that powers the association locally and nationally was one area where there was resounding support from all stakeholders. Feedback only solidified the need and urgency for FPA to better integrate all technology to make data-gathering and reporting, communications, program management, and member experience both nationally and locally. Concerns that were shared were about how the technology improvements would be developed and paid for, what would happen with current technology used by chapters that is working adequately, and the timeframe for making the improvements.

What was the feedback like on the concept of participatory governance?

The opportunity to bring more leadership voices from across the association in the strategy-setting and decision-making of FPA was met with general enthusiasm. Stakeholders are supportive of measures that empower more FPA leaders to help chart a course for FPA moving forward. Concerns in this area primarily were about additional bureaucracy if more leaders are added to the governance process, the make-up of the OneFPA Advisory Council, and how leaders would be selected to serve on committees and task forces.

Will FPA place a premium on the need for greater transparency moving forward?

FPA leaders and staff take seriously the need to operate with accountability and transparency. Through the Listening Tour, we learned that all of our stakeholders would like to see FPA increase its level of transparency in the spirit of participatory governance. In response, the decision was made to offer regular financial updates so stakeholders can better understand the financial state of the association with the first one taking place in January 2019. As we move through the OneFPA Network process, greater transparency will be embraced to help make all stakeholders aware of what is transpiring in their association.

— We Adjusted —

The Second Iteration of the OneFPA Network Draft Plan is vastly different from the original draft plan FPA proposed. Why is that?

The intent to create a more unified association through greater alignment and integration to address external and internal challenges is the same. The two core principles that are the foundation of the OneFPA Network vision—democratizing decision-making in the organization and institutionalizing a greater degree of strategic and operational collaboration—also remain. What has changed significantly, based on the feedback from stakeholders, are the details and timing around these core principles.

Who was responsible for developing the Second Iteration of the OneFPA Network Draft Plan?

The Second Iteration of the OneFPA Network Draft Plan was developed by the OneFPA Transition Task Force with the support of two association management consultants and FPA staff, and reviewed and approved by the Board of Directors. This important Task Force, which is comprised equally of national and chapter leaders, was charged with synthesizing all feedback collected throughout the Listening Tour and proposing a new draft of the plan. The volunteer leaders who serve on this task force were selected because of their varying views on the original plan (support and concerns), and because they had the interest and passion to examine what's best for FPA and important to our members.

At a high level, what were the major changes that were adopted in the new draft plan and were those changes based on feedback provided during the Listening Tour?

The significant modifications occurred in the area labeled 'centralized functionality'. The three major changes based on feedback from the Listening Tour are: engaging in robust beta-testing with precise goals and measures; focusing on integrated reporting and best practices in the accounting/finance area; and removing the requirement that chapters shift their legal status of being separately incorporated entities.

Did the OneFPA Transition Task Force and Board of Directors consider dropping the plan in its entirety?

Even before the start of the Listening Tour, the Board had considered and was prepared for any outcome, including not moving forward with any aspect of the OneFPA Network vision. Through the Listening Tour experience, it was clear that members and leaders are often confused and/or disconnected from many aspects of FPA, which helped substantiate the need for greater system-wide collaboration and cooperation.

What steps did FPA take to vet the new plan with stakeholders before it was approved by the Board of Directors?

Before the Second Iteration of the OneFPA Network Draft Plan was sent to the Board of Directors for review, the OneFPA Transition Task Force held five focus groups with chapter leaders and members to vet the plan and proposed changes to ensure they addressed the issues raised in the Listening Tour.

Was the Board of Directors supportive of the new plan?

The Board of Directors entered this process with an open mind about the outcome. They leaned on and empowered the OneFPA Transition Task Force to assess the feedback and propose changes to the draft plan. On March 21, 2019, the Board met and reviewed the revised plan and voted to support the new draft plan presented by the OneFPA Transition Task Force.

FPA has now eliminated the provision calling for chapters to be stripped of their legal structures. Why was that decided?

Of all the provisions in the original draft plan, changing the legal status of chapters drew the most concern. While the intent was to further cultural unity and do away with unnecessary legal structures that provided limited value, many chapter leaders did not perceive a sufficient benefit and were concerned that it would limit the autonomy of chapters. The OneFPA Transition Task Force felt that the goals behind the OneFPA Network vision could still be pursued and tested without the provision.

Could FPA at one point still call for chapters to change their legal structures?

There is no plan or intent to re-introduce the legal structure requirement right now. The Board and the OneFPA Transition Task Force are committed to significant testing before any changes are made to the plan or protocols are instituted system-wide. The OneFPA Advisory Council and the Board of Directors will be able to assess the progress under the Second Iteration of the OneFPA Network Draft Plan, including any issues regarding legal structures. After the beta-test chapters are selected, they will have the option to fold into one FPA legal entity as a part of beta-testing, but it will not be required.

Why was beta-testing included in the new plan?

The Second Iteration of the OneFPA Network Draft Plan represents a significant organizational departure from the way FPA currently operates. In support of being a learning organization and understanding that despite the best of intentions, the smart strategy is to take a ‘lean business’ approach, which means to test, verify and adjust before system-wide implementation is considered.

What is the timing and length of the beta-test and what does it mean for other chapters?

Beta-test chapters will commit to a two-year experience beginning on January 1, 2020. Assessing and reporting of the beta-test experience will occur immediately with information provided to all chapters on an ongoing basis. Until the assessments occur, it is impossible to say if, what and when aspects of the OneFPA Network might be instituted system-wide. If it is determined by the OneFPA Advisory Council and the Board of Directors that an aspect of the plan should be instituted system-wide, that could occur with ample notice to all stakeholders and in phases to ensure effective implementation.

What is the desired outcome of the Second Iteration of the OneFPA Network Draft Plan?

Overall, the objective is to create a stronger and more relevant FPA through greater strategic, cultural and operational alignment and integration. Whether we can achieve that objective through the specifics of the Second Iteration of the OneFPA Network Draft Plan will depend on the assessment of a set of goals and measures developed by the OneFPA Transition Task Force in consultation with an independent association management firm.

What is the process for chapters to apply to be a beta chapter?

The OneFPA Transition Task Force will develop the Master Services Agreement and the beta-test application, which will include details about the roles, responsibilities and expectations of beta-test chapters. The beta-test chapter application will be distributed to all chapters on July 11. Interested chapters will submit a completed application by September 9 and beta-test chapters will be selected by September 18. Additionally, the OneFPA Transition Task Force will develop the draft Master Services Agreement and Key Performance Indicators (KPIs) related to beta-test chapters during the 45-day comment period and will share them with FPA stakeholders for feedback from June 3 to July 1 —prior to their dissemination on July 11 as part of the beta-testing application process.