# OneFPA Network Beta Test
## Assessment Report | Q1 2021

*A report provided by the OneFPA Transition Task Force.*

Do you have comments or questions about this report? The OneFPA Transition Task Force wants to hear from you.
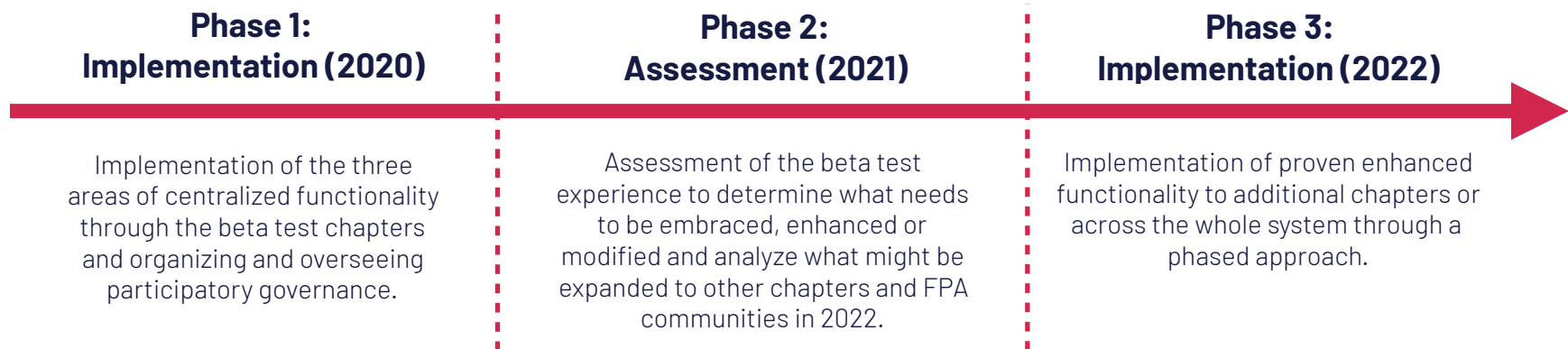
Contact us at onefpanetwork@onefpa.org.

# What's Inside

# Three Phases of the OneFPA Network

The OneFPA Network is a 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 were 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, which has continued through the first quarter of 2021. There are three phases for this work:

| Phase 1:<br>Implementation (2020) | Phase 2:<br>Assessment (2021) | Phase 3:<br>Implementation (2022) |
| --- | --- | --- |
| Implementation of the three areas of centralized functionality through the beta test chapters and organizing and overseeing participatory governance. | Assessment of the beta test experience to determine what needs to be embraced, enhanced or modified and analyze what might be expanded to other chapters and FPA communities in 2022. | Implementation of proven enhanced functionality to additional chapters or across the whole system through a phased approach. |

# Assessing Our Progress

As was outlined in the OneFPA Network Beta Test Assessment Report for Year-End 2020, assessing the progress made will be ongoing throughout 2021 every quarter. As detailed in the chart to the right, the assessment for Q1 2021 is focused on three primary areas: Technology Adoption, Service and Support, and Qualitative Data.

While the upcoming assessment for Q2 2021 will provide more impactful data related to membership, finances, and efficiencies, we must still measure what we can to determine whether our efforts are impactful. But impact over the first quarter was seen in several other ways, including the continued growth in collaboration between chapter executives and the Central Office staff; the continued work of the OneFPA Advisory Council to bring more voices to the table; and the development of a first-of-a-kind benchmarking tool that will help chapters.

## The OneFPA Advisory Council

While the beta test is primarily focused on assessing whether or not efforts around centralized technology, staffing, and financial reporting/benchmarking, a lasting legacy of the program will likely be through the OneFPA Advisory Council. While the first year of the Council (2020) was focused on establishing its purpose and building a foundation, it started to hit its stride by the end of the year. The Council has now established a regular cadence for their meetings and has been exploring a variety of critical issues, including:

| AREA | Q4 2020 | Q1 2021 | Q2 2021 | Q3 2021 | Q4 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) | | | ✔ | ✔ | ✔ |

## Assessing Our Progress

- Member recruitment/retention
- Member engagement
- Ways the Central Office can improve services to members and chapters
- How the Central Office and FPA chapters can truly collaborate.

Meetings in November 2020 and February 2021 resulted in detailed reports being sent to the FPA Board of Directors and the Central Office outlining specific ways the organization can improve strategically, tactically, and programmatically. The Board and staff responded to these reports by outlining how the organization can improve and offered specific tactics the staff is taking to improve various programs that support chapters and the value members receive.

A recent meeting of the Council on April 8 focused on hearing from FPA President Skip Schweiss, CFP®, AIF®, and FPA CEO Patrick Mahoney about the current state of FPA and on hearing about a potential strategy to increase membership. Members of the Council will discuss this strategy with their respective chapter boards and come back to the next meeting on May 20 to share their feedback. This input will be sent back to the CEO and Board for consideration as they look to put this strategy into motion.

This is an example of the opportunity the Council affords the Association and why it will have a lasting legacy even when the OneFPA Network beta test is completed. The opening of communication between the Board, chapters, and staff has been significantly improved. FPA's volunteer leaders and staff are hearing critical feedback, and that feedback is being used in the decisions that are being made.

# Technology Adoption: Beta Test Chapter Executives

In early April, the 11 beta test chapter executives were asked a series of questions about the various technology tools that have been provided throughout the beta test to gauge their usage and the impact the tools are having. These questions were asked for the Year-End 2020 Report and are provided for comparison purposes. Please note that only 10 of the 11 beta chapter executives responded to the recent survey request.

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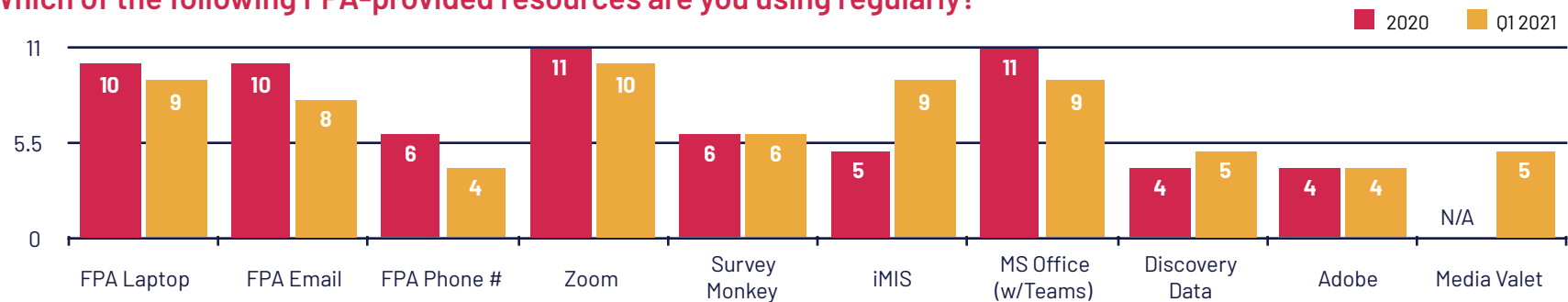


## How important are the following resources to the chapter's operations to do your daily work?

| | I NEED THIS RESOURCE TO DO MY JOB | | I COULD TAKE IT OR LEAVE IT | | THIS DOES NOT HELP ME DO MY JOB | |
|---|---|---|---|---|---|---|
| | YEAR-END 2020 | Q1 2021 | YEAR-END 2020 | Q1 2021 | YEAR-END 2020 | Q1 2021 |
| FPA Laptop | 7 | 7 | 3 | 2 | 1 | 1 |
| FPA Email | 8 | 7 | 2 | 2 | 1 | 1 |
| FPA Phone # | 5 | 3 | 3 | 3 | 3 | 4 |
| Zoom | 11 | 10 | 0 | 0 | 0 | 0 |
| Survey Monkey | 7 | 6 | 4 | 3 | 0 | 1 |
| iMIS | 9 | 8 | 1 | 2 | 1 | 0 |
| MS Office (w/ Teams) | 9 | 7 | 1 | 1 | 0 | 2 |
| Discovery Data | 6 | 6 | 4 | 4 | 0 | 0 |
| Adobe | 6 | 7 | 3 | 3 | 1 | 0 |
| Media Valet | N/A | 4 | N/A | 4 | N/A | 0 |

# Service and Support: Cayzu Ticketing System

As outlined in the Year-End 2020 Report, the FPA Central Office staff implemented a web-based ticketing system (Cayzu) to provide members, chapter leaders, and chapter executives a tool for submitting service requests. The system is available to any member of the Association looking to receive support on any FPA-related issue. While the goal is to have all chapter leaders and chapter executives use Cayzu for all requests, the Central Office still fields a vast majority of requests via email or phone. This is especially true of requests coming into the office from chapter leaders and chapter executives.

The issues that come through the Cayzu system range from simple to complex. For example, under "Chapter Website Issues" on the chart below, those issues can include simple requests like resetting administrative passwords and more complex requests like building chapter websites from scratch. "Computer/Software Issues" also includes requests for new PCs or replacements, which can take up to seven days to complete.

The chart only captures those issues submitted by beta test chapter executives via Cayzu from January through March 2021 and is not exhaustive of all service requests. For comparison purposes, we provide the average elapsed time for service requests through Q1 2021 and how the elapsed time compares to those service requests for all of 2020. This will continue to be tracked quarterly throughout the year. "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 | | MARKETING ISSUES | | MEMBERSHIP ISSUES | | GENERAL/ ADMINISTRATIVE ISSUES | | TOTAL | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | NUMBER ISSUES | AVG. TIME | NUMBER ISSUES | AVG. TIME | NUMBER ISSUES | AVG. TIME | NUMBER ISSUES | AVG. TIME | NUMBER ISSUES | AVG. TIME | NUMBER ISSUES | AVG. TIME | NUMBER ISSUES | AVG. TIME |
| JAN 2021 | 9 | 11.60 | 4 | 5.50 | 0 | 0.00 | 1 | 41.00 | 2 | 5.50 | 2 | 4.00 | 18 | 11.30 |
| FEB 2021 | 9 | 6.20 | 1 | 5.00 | 4 | 6.30 | 3 | 1.70 | 0 | 0.00 | 1 | 3.00 | 18 | 3.70 |
| MAR 2021 | 5 | 4.00 | 6 | 6.70 | 1 | 1.00 | 1 | 13.00 | 6 | 4.50 | 2 | 2.50 | 21 | 5.30 |
| Q1 2021 AVG. | 7.70 | 7.30 | 3.70 | 5.70 | 1.70 | 2.40 | 1.70 | 18.60 | 2.70 | 3.30 | 1.70 | 3.20 | 19.00 | 6.80 |
| 2020 AVG. | 3.70 | 1.96 | 2.50 | 4.17 | 0.60 | 20.00 | 0.90 | 10.05 | N/A | N/A | N/A | N/A | 7.70 | 4.99 |
| DIFF. | 4.00 | 6.34 | 1.20 | 1.53 | 1.10 | -17.60 | 0.80 | 8.55 | 2.70 | 3.30 | 1.70 | 3.20 | 11.30 | 1.81 |

# Extending Collaboration Beyond the Beta Test Chapters

One of the successful initiatives of the beta test over the first year was consistently and regularly bringing together the beta test chapter executives in the spirit of collaboration. The twice-monthly calls have proven effective in creating camaraderie and fostering opportunities for close collaboration. In the fist quarter of 2021, we began to expand this concept to all 80+ chapters nationwide. Seven (7) chapter "Collaboratives" were established to group chapters together into smaller, regional groups. Each Collaborative has a 'Lead' (a volunteer chapter executive) who sets the meetings and agendas. The FPA Chapter Engagement staff is meeting monthly with the Leads to identify any recurring themes among the meetings. The initial feedback on this is very positive, with the chapter executives in attendance finding the collaborations and conversations beneficial. Staff will continue to monitor and modify the process in Q2, with the goal of formalizing the structure by the beginning of Q3.

| PACIFIC SOUTHWEST | NORTHEAST | MIDEASTERN | MIDDLE AMERICA | SOUTH | MIDWEST | PACIFIC NORTHWEST |
|---|---|---|---|---|---|---|
| Sarah Frankenfeld (L) | Elissa Weick (L) | Ann McKenna (L) | Jim Susman (L) | Christine Brown (L) | Jessica Hawthorne (L) | Open |
| Melissa Manchester (S) | Elise Fette (S) | Melissa Manchester (S) | Elise Fette (S) | Elise Fette (S) | Elise Fette (S) | Melissa Manchester (S) |
| Austin | Long Island | Pittsburgh | Greater St. Louis | Tampa/NE FL/Suncoast | Minnesota | Central California |
| Dallas/Fort Worth | Connecticut | Central Pennsylvania | Iowa | Georgia | Wisconsin | Northern California |
| Houston | Northern N.E. | Central Virginia | Eastern Iowa | Greater Memphis | Greater Indiana | San Francisco |
| Tulsa | Rhode Island | Hampton Roads | Nebraska | East Tennessee | Kentuckiana | Silicon Valley |
| Central Oklahoma | New Jersey | Philadelphia/Tri-State | Southern Colorado | Middle Tennessee | Northeast Ohio | San Gabriel Valley |
| Southern Arizona | Metro New York | National Capital Area | Illinois | Miami | Central Ohio | Spokane |
| Greater Phoenix | Massachusetts | Maryland | Greater Kansas City | N. AL/Gulf States/Miss. | Southwestern Ohio | East Bay |
| Los Angeles | Greater Hudson Valley | | Utah | Central Florida | Michigan | Mid Oregon |
| San Diego | Northeastern N.Y. | | Colorado | Southwest Florida | | Puget Sound |
| Orange County | Western New York | | Kansas | South Carolina | | Oregon & SW Wash. |
| San Antonio | Central New York | | Greater New Orleans | Charlotte | | |
| Ventura County | Greater Rochester | | Baton Rouge | South Florida | | |
| Hawaii | Southern Tier of N.Y. | | | Triangle | | |
| West Valleys | | | | | | |

L = Lead    S = Staff Liaison

# Perspectives from the First Quarter of 2021

### FPA of Illinois

The FPA of Illinois Board was excited to begin the OneFPA beta test journey when they hired me, in collaboration with the FPA Central Office, in 2017. The Board viewed this beta test as an opportunity to positively impact the chapter member experience through collaboration with other chapters and bring advanced technology to streamline operations to provide better online member and customer platforms. The test started off on a high note in January 2020, and I was excited to begin. You would think the beta test would come to a halt or slow down because of the pandemic, but the opposite happened. We all came together very quickly, and the collaboration started happening almost immediately.

Now that the first quarter of 2021 has ended, I believe that the 11 beta chapter executives are going strong. We communicate as a group at least once each day—sharing ideas, education, personal growth opportunities, lending a hand, offering advice, moral support, and more. I don't feel as though I am living on an island. I am part of a collaborative, thoughtful group of smart women who have assisted the FPA of Illinois to provide a better member experience and made my job enjoyable. I do not think that my chapter—or me personally and professionally—would be nearly as successful in our virtual environment if not for the beta chapter executives and this beta test.

There have also been some bumps. While the 11 of us work very closely, I feel there is still room for improvement by including the chapters in membership and marketing plans. At times, we are an afterthought and need to raise our voices to remind the FPA Central Office that we are here and on the front lines providing the membership experience to our members. But, things are much better than they were in the past, and it is very noticeable.

I look forward to what the rest of 2021 will bring!

Kristin Prine
Chapter Executive
FPA of Illinois

# Perspectives from the First Quarter of 2021 ——

### FPA of Metro New York

The FPA of Metro New York chapter, newly formed under FPA's corporate status in 2018, was in many ways a pre-beta test chapter. We were glad to be a leader and early adopter of many aspects of the OneFPA Network plan in the interest of helping to fine-tune its vision and implementation. There are aspects of our experience that directly informed the plan's evolution and played a significant role in shaping the final plan approved by the FPA Board of Directors in July 2019. Since January 2020, the 11 beta test chapters have followed a path charted in large part (and in certain key areas, such as staffing, governance, and finance) by the Metro New York experience.

I know I am not the first of my chapter executive colleagues to say the most powerful and successful aspect of the beta test to date, in my view, is the centralized staff. I felt the difference in being a member of the FPA staff immediately upon being hired before the beta test in April 2018. I was given a professional home—the connection and support of colleagues and association tools, the shared purpose of an organizational mission, inclusion in staff meetings—which laid the ground for me to operate more successfully in service to the Metro New York chapter. The beta test took this a step further as I now collaborate daily with a team of chapter executives who challenge and support each other in a way that directly sets me up for success. The collaboration impacts the decisions I make, how I help steer the chapter forward, and how I advise our volunteer leaders. I am far more effective in my job because of this group, and I enjoy that job immeasurably more.

As we close the first quarter of 2021, my sense is there may be a gap, at least in Metro New York, between the way the chapter executives and the volunteer leaders perceive the success of the beta test to date. The success of the staff piece is, in a sense, less visible to the volunteer leaders. The team support impacts my job performance (from member support to programming to governance). Still, my sense is volunteer leaders are looking to the more tangible aspects of the beta test when they measure its success: things like technology and a centralized chart of accounts, which have been slower to develop and materialize. The Metro New York volunteer leaders have voiced impatience with FPA's progress in those areas.

There are areas for improvement. Collaboration between the chapter executive staff team and the Central Office staff has not moved forward as smoothly as I think we'd hoped. My sense is this is due to staff teams traditionally operating in silos that have been hyper-focused on their respective team success.

## Perspectives from the First Quarter of 2021 ————————

### FPA of Metro New York *(continued)*

I think FPA is in the midst of an identity crisis that the shift to virtual during the pandemic has brought into higher focus. I see regional groups of volunteer leaders meeting to make programmatic decisions without their chapter executive staff. Beta test chapter leaders form other groups outside the beta test, and groups like the Alliance Forum seek to fill what they perceive as a leadership void. I am very much in favor of cross-collaboration between chapters, but what I am seeing feels disjointed, disorganized, and like it's rising out of a need to fill a vacuum that it was arguably the beta test's job to fill.

Volunteer leaders are hungry for collaboration and forward momentum, and the fact that they are seeking them outside the framework we've provided tells me we have work to do. We have an opportunity in this virtual moment to build a more effective chapter network, but what I am currently witnessing feels more fragmented.

I look forward to continuing to help lead the Association forward and our progress in the remaining months of the beta test.

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Clary Delano
Chapter Executive
FPA of Metro New York

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FPA