STATUS REPORT

AD HOC COMMITTEE ON REORGANIZATION



September 2022

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BY THE *AD HOC* REORGANIZATION COMMITTEE
SEPTEMBER 2022

KEY *AD HOC* REORGANIZATION COMMITTEE RECOMMENDATIONS

- Simplify Clubs as described in proposed bylaw changes.
- Allow Clubs to decide the value, and future, of their District including potentials for continuing as is, merging, or dissolution.
- Implement electronic voting for all National meetings to allow for the direct participation in decision-making by Clubs (see Section 2.5)
- Focus National Departments and Committees on direct support of Clubs & Members. Initial focus should be to enhance Education, Boating & Social events, Marketing & Membership, and overall Communication.
- Ensure that each National Department and Committee conducts the formal self-evaluation process recommended in this report (Section 3.2) to improve services to Clubs.
- Develop a formal and comprehensive communications strategy and plan between National and Clubs.
- Implement a formal program to improve services, operational effectiveness, and efficient use of scarce resources for all National Departments and Committees based on the recommendations in this report.
- Ensure that all National Departments and Committees develop a succession plan.
- Enable online Member access to Club events across our organization including organization, registration, and participation ("***SEAS*** **The Day**" – **S**quadron **E**ducation & **A**ctivity **S**cheduler).

Detailed recommendations and status are contained in this report

1. SUMMARY

Over the last 30 years, USPS/ABC leadership has been presented with compelling data and reports that demonstrate the decline of the organization. Membership, retention, educational activity, external recognition, and other factors clearly exhibited negative trends.

The *ad hoc* Reorganization Committee was formed in early 2021 and explored a number of potential changes to the organization. Our intent was, and still is, to better support Clubs[1]. From the Member Satisfaction Survey as well as common sense, the local Club is the center of USPS life for most members.

[1] The term *Clubs* is used to reference the use of both Squadrons and Clubs.

We have conducted a detailed member survey, gathered and analyzed reams of membership data, and explored a wide range of issues affecting the organization. Significant input was solicited from Clubs and Districts through Town Halls, Focus Groups, current and past surveys, and discussions. Consequently, we determined that the best chances of increasing Club support and service would be to improve operations at the National level, which does not depend on Districts to be the conduit, and leaves the fate of each District in the hands of its constituent Clubs. The proposal was accepted by the Board of Directors, in principle subject to modification.

It is difficult to alter organizations like ours. After all, change is hard and sometimes painful, especially when looking in the mirror. The ad hoc Committee has stirred the pot and turned up the heat. We have shown that the organization needs to adapt to ongoing changes in society, the boating community, how people prefer to interact with membership organizations, how they prefer to learn, and so on. We have helped "unfreeze" our organization, and with the Board's backing, we can move forward. In fact, much progress has been made: people have come forward with ideas, creativity is bubbling to the surface, and we are breaking down the silos that we made over the years. One tangible outcome is that the Board of Directors has pursued simplification of By Laws for Districts and Clubs, and tasked the Planning Committee and Rules Committee to do so. Another spin-off is the Educational Department Modernization program initiated by the National Educational Officer. Additionally, the Board is pursuing electronic voting, as recommended by the ad hoc Committee. And more to come.

The ad hoc Committee's focus is on supporting clubs and squadrons. We continue to advocate on Clubs' behalf. Currently, we are working with National departments and committees including the Executive, Educational, Administrative, and Secretary Departments to focus attention on better serving clubs and members.

Detailed status and recommendations follow. The Status section summarizes what the ad hoc committee has accomplished along with actions and initiatives conducted by Departments and Committees that are consistent with the principles we put forth for reorganization. The Recommendations section contains suggestions that cross organizational lines and silos, so we have organized them into categories including Education, Boating & Social Events, Marketing & Membership, and Communications as well as some universal recommendations for the National organization.

2. STATUS

The status of reorganization activities is summarized below for the ad hoc Committee and for each department.

2.1 Ad Hoc Committee Activities

We collected, analyzed, and organized a great deal of hard data and facts and presented it all before the organization at the BOD, District, Club, and member levels. All of the information provided a compelling case that the organization is failing and that we, at all leadership levels, must improve the organization's culture, operations, structure, and procedures.

The ad hoc Committee has:

- Studied and analyzed membership reports containing years of data

- Analyzed reams of data describing educational activity throughout the organization
- Conducted a Member Satisfaction Survey that provided excellent insight into problems perceived at the Club level
- Organized a Club Focus Group that has met three times and provided valuable input and validation of our recommendations
- Conducted two Town Halls and met numerous times with the BOD, at DC/DXO meetings, at DEO meetings, and other venues to present the information and promote a range of ideas
- Been working with each Department, attempting to evaluate current operational effectiveness and develop improvements.

2.2 Executive Department

Marketing has been independently pursuing the notion of sharing boating and social activities among Districts and Clubs across the country. Members of the ad hoc Committee met with Marketing's Chair and shared its idea of developing the online SEAS the Day program that aims at the same goal. Both groups indicated a willingness to work together to achieve some synergy.

Other areas of the Executive Department are being discussed and we look forward to continuing work in that Department.

2.3 Educational Department

Educational Department has undertaken a comprehensive Modernization study of its operations to address potential improvements in order to maximize support to Clubs, create more effective communication & coordination, improve departmental efficiency, and enhance department management capabilities. There are four goals, each with associated intended outcomes:

- Maximized Support to Clubs
- Effective Communication and Coordination
- Efficient Department Operations
- Effective Department Management Capabilities

Modernization focuses on seven operational areas that are evaluated against the above goals using the *Strengths, Weaknesses, Opportunities, and Threats (SWOT)* model:

1. Product Planning
2. Product Development and Delivery
3. Remote Learning
4. Resource Utilization
5. Communications
6. Direct Support to Clubs
7. Departmental Management

The project is well underway and making good progress.

2.4 Administrative Department

Squadron Support Committee has developed a detailed report offering what they can do for the organization and more importantly membership. The report focuses on Improving visibility and communication, improving and updating the committee webpages, defining roles and expectations of committee leadership, refining committee roles and operations, coordinating with other Departments, and other improvements.

Streaming of National Meetings will allow Clubs and members to remotely participate in national meetings. Planning for 2023 Annual Meeting and Fall Governing Board is underway.

Enhancing National Meetings to facilitate more participation and attract more Club leaders and members is being explored by the Board of Directors. They recognize the need for National meetings to be more member-friendly and interesting. The V/C for Administration is leading the initiative.

Improving Email Communications by establishing automatic database updates, improving the capability of parsing emails for targeted communications, and using improved processes is a new collaborative effort between the NAO, ITCom, and HQ staff.

Squadron Support and Development Committee and **Membership Committee** are collaborating on revising the Squadron Guide Book and the *OT in 3* seminar for new Club leaders, to reflect changes in the recently passed bylaws. The anticipated completion date is the 2023 Annual Meeting.

2.5 Secretary's Department

Electronic Voting at national meetings was recommended by the ad hoc Committee to the Board of Directors in order to facilitate direct engagement and representation of Clubs. Local Clubs are the lifeblood of the organization and must be heard. The current proxy-based system is not working on behalf of Clubs, which should have a direct voice in organizational decisions. The BOD agrees and is currently working on a project that will hopefully allow direct participation by all Clubs through electronic voting by the 2023 Annual Meeting. The National Secretary is taking the lead.

Heritage and Documents is positioned to support the reorganization project. The Operations Manual has been simplified greatly by the size reductions that occurred during the past three years and continue to occur as the organization downsizes. Not only have superfluous information and chapters been eliminated, but multiple topics have been and are being consolidated into single chapters. The Bylaws Synchronization Project continues to simplify the manual while further positioning the committee more ably to respond to organizational changes.

Information Technology has revised and updated the Education pages of the public site to make it easier to find information about courses and seminars and to register as appropriate. Content, menus, and navigation are improved. Additionally, the *ad hoc* Committee and ITCom have been in discussions about simplifying and organizing the members' site, as referenced below in Section 3.6 in order to facilitate finding needed information and assistance, and improving communication with Clubs and members. Finally, both committees have begun to explore development of the SEAS the Day information tool as mentioned in Section 3.4.

Communications Committee, HQ staff, and the ad hoc Committee has met to explore issues and constraints in organizational communication, begin discussions about developing a communications

strategy, and is exploring options to build upon operations to include more direct interaction with the Clubs.

3. SPECIFIC RECOMMENDATIONS

3.1 Focus on Clubs

National departments and committees should be more proactively engaged to help and support both active Clubs and those on the decline. The historical approach of just providing information and hoping for the best is no longer sufficient.

We recommend that the BOD as a whole and the VCs as Department Heads lead the evaluation and analysis of their departments and committees, as described below in Section 3.2. We also offer specific ideas and recommendations in four areas of concentration that should be integrated into this evaluation process as specific areas of improvement:

- Section 3.3 – Education
- Section 3.4 – Boating and Social Events
- Section 3.5 – Marketing and Membership
- Section 3.6 – Communication

3.2 Recommended Approach for All Department Heads

Since operations improvement, whether called part of Reorganization or not, is a line management responsibility that falls under each VC/Department Head, we recommend that the Vice Commanders work with their committees as appropriate to analyze their current goals, procedures, and outcomes and plan for improvements in serving Clubs using the following approach and steps:

1. Establish appropriate goals for each Committee, such as:
    - Maximize support to Clubs
    - Improve internal and external communication & coordination
    - Increase operational efficiency
    - Ensure a leadership succession plan
    - And/or others as appropriate
2. Describe current operations, processes, people, and policies. Identify all current functions and responsibilities and their contribution to
    - Directly servicing Clubs and members
    - Member recruitment and retention
    - Other value to the organization
3. Evaluate how well the described procedures currently meet each of the goals developed for the committee. Perform a SWOT[2]-type analysis if applicable and identify potential to eliminate unnecessary tasks and functions.

[2] SWOT: **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats

4. Identify required changes and improvements to the committee's role, responsibilities, and operations in order to better meet the established goals. Also evaluate expected benefits, constraints, risks of each intended improvement.
5. Develop project plans including:
    - Listing the major steps and time frame required to flesh out the details of the areas identified above.
    - Subsequent steps and time frames to the plan for implementation of these changes and improvements.

Sections 3.3 through 3.6, following, offer specific recommendations that should be incorporated into departmental analyses. These suggestions fall into the four functional areas listed above, and not by department, since many of these recommendations cross departmental and committee lines and will require coordination at the BOD level. The exception is Education, which is almost entirely contained within the Educational Department, but which could also participate in the discussion of Communication in Section 3.6.

3.3 Education

As summarized in the Status discussion above, the Educational Department is in the process of a major Modernization project. It may address some or all of the following specific recommendations. The Department should continue with the Modernization initiative, integrating the following suggestions.

Recommendations:

- Develop procedures, processes, and coordination to more quickly develop new courses and seminars, and update existing ones. Update material to reflect continually evolving boating technologies, changes in law and regulations, contemporary equipment, and so on. Continually review boating literature for new boating technologies and rapidly create articles, electronic "pamphlets", YouTube videos, and other means to educate boaters while promoting America's Boating Club throughout the boating community. Subsequently, articles may then be transformed into seminars and course chapters as appropriate. Electronic publication (e.g., eBooks, online learning, etc.) facilitates keeping educational material current.
- Update delivery systems to include more dynamic content including more electronic documentation and presentation, animations and videos, blended learning approaches, and electronic testing. This is currently done in much of the online offerings and should be extended to more classroom presentations as well.
- Continue and accelerate the use of more eBooks and electronic teaching tools
- Complete the development of online testing for Clubs teaching online
- Develop stand-alone presentations to update existing courses and seminars with "what's new" material, aimed at members who have previously taken similar courses and seminars to keep them engaged
- Update instructor training/development to reflect contemporary educational approaches, such as use of teaching technologies, blended learning, etc.

- Develop and deliver additional tools and “How To” guidance to support Clubs to enhance Club teaching capabilities
- Systematize and formalize blended teaching approaches that Clubs may access if desired as part of their curriculum
    - Online courses and seminars
    - Local Club discussion guides
    - Blended learning guidelines and suggestions
- Continually inform local Clubs about online students in the Clubs’ catchment areas so that the Club can establish relationships for recruitment and retention

3.4 Boating and Social Events

Boating and social events are, by definition, local events. However, many local Clubs are not that active. Many can benefit from heightened support and structure from national committees.

Some of this falls under Marketing and much of it under the Administrative Department. But many committees can get involved and help out.

The Member Satisfaction Survey results indicate that a majority of members enjoy social events at the local level, but that there needs to be more of it and the quality and satisfaction levels need improvement. Many Clubs do not boat much anymore, if at all, and survey results reflect a significant dissatisfaction with the lack of on-the-water events, especially among newer members. Clubs need to change their image of only having dinners and sedentary events; more activity is necessary to attract and keep new and existing members.

Additionally, exit survey results indicate that Club culture needs to be more welcoming and inclusive. Both surveys comments indicate new members often feel isolated.

Recommendations:

- Develop a more improved method of organizing, coordinating, and promoting boating and social events across the country. Even though events are local, National can provide support through improved information gathering and publication, online.
    - Develop and implement an automated event scheduling system, calendar, and database for local Clubs to promote and coordinate with members in their areas, such as one promoted by the ad hoc Committee called SEAS the Day, the Squadron Education and Activities Scheduler.

- Be more proactive with frequent communication with Clubs to solicit information and promote regional/area boating events and to help publicize those events more effectively. Both the Marketing Committee and the Squadron Activities Committee could be instrumental here.



- National meetings must involve more Club-based leaders. See Section 2.4 for current status. We agree with and support V/C Michael Wiedel statement: *Our National meetings need to change from just a collection of committee gatherings to a more inclusive event … and have them in a boating friendly venue with relevant seminar opportunities, and with a different timeline that may draw members who may not otherwise attend.*

3.5 Membership Recruitment, Retention, and Marketing

Membership is local. Members' identify with their local Club and that is where recruiting and retention are best accomplished. We have tools, information, and advice to help Clubs with marketing and membership recruitment including Brochures & the App, Marketing presentations, ad copy & design, logos & branding, advice and guidance to help Clubs with their own marketing and recruiting efforts, and other tools. But many Clubs are not aware, so we need to be more proactive and make it easier to access and use this material, and provide more help with problem-solving.

Recommendations

- Improve the process of translating cyber-members into Club-based members. The current communication process does not work. Develop a more overt means of connecting cyber-members and local Clubs by communicating with individual cyber-members while simultaneously providing contact information about local cyber-members to Club officers. The process should include follow-up and monitoring to help ensure that local contact is made.

- Simplify instructions and guidance to make it easier for Clubs to use Marketing, Recruitment, and Retention information and tools easier to apply.
    - Re-vamp the Marketing Guidebook to eliminate extraneous sections on the formation of the America's Boating Club name change, simplify How To do marketing guidance, and simplify branding instructions
    - Consolidate and simplify ProLog
    - Eliminate older and redundant PowerPoint presentations
    - Create a cheat-sheet type guide on how to use marketing materials and include it prominently on the MarCom webpage
- Update and streamline webpages for Marketing, Membership, and other committees' pages related to recruitment and retention in order to make them easier to navigate, and for Clubs to find what they need.
- Fund and conduct larger and more impactful nation-wide advertising campaigns for the organization as a whole, to promote online and classroom education, and to drive boaters to Clubs including digital advertising and promotion, email campaigns, social media advertising, website marketing, special bundles/discounts, and promotions as appropriate. This will require that the BOD designates a specific line item budget annually as an ongoing investment.
- Develop and implement an intensive communications campaign directly to Club officers regarding recruitment and retention tools and guidance
- Develop an enhanced monitoring system to identify Clubs that are at risk, using appropriate evaluation criteria such as rapidly declining membership, difficulty in filling positions, lack of educational activities, and lack of social and boating events. More interaction is needed with Clubs to check on their overall health. Unsurprisingly, many Clubs begin to fail over a long period of time often before it is recognized. Consequently, we should proactively conduct preventive care activities with all Clubs to help them identify negative trends and mitigate the risks.
- Enhance the abilities of the Membership Committee to become retention specialists and consultants. The knowledge exists, but proactively presenting and promoting this capability to Clubs is required. We believe it's a matter of organization and communication, not expertise, which needs to be addressed.

3.6 Communication

Communication is a problem at all levels. The member satisfaction survey indicates the following:

- Satisfaction is high for local Club news and information
- Relatively fewer people read National blasts; there is too much esoterica in them and they are indiscriminately blasted to members
- Member satisfaction is very low for both District and National news and information; members do not feel they are kept informed

- About half of all members read the Ensign
- While many people read *The Ensign*, members still feel out of touch

Communication must be two way, between Clubs and National Committees and Departments. This is critical to represent Clubs' interests, address their needs on a continual basis, and reinforce a cohesive America's Boating Club.

Additionally, we are more dependent upon the use of information technology for communication and interaction with Clubs and members. The importance of the IT Committee cannot be underestimated. Like many other committees, they are challenged with shifting priorities, lack of guidance from the BOD regarding priorities, and limited volunteer resources.

Recommendations:

Develop an overall Communications strategy to improve information transfer bi-laterally, involves Clubs and members, and decreases the perceived isolation of Clubs from National affairs.

- Shorten the communication chain directly from National to Members and Club leadership. We recommend **regularly scheduled meetings** between National officers and Club officers, organized to individually address Club Commanders, XOs, SEOs, AOs, and so on. There should also be occasional National Bridge to Club Bridge meetings to discuss a wide range of topics.

- Modify communications to members in both *The Ensign* and in targeted monthly emails to include more useful information on topics such as:
    - Boat-related items, boating skills and knowledge
    - Info on new courses and seminars
    - Organizational news, resources
    - Events that have and are taking place

- To avoid information overload and reach the right audience, target specific information to different users, such as useful information for each of the various Club officers and separately for regular member news. Also ensure that appropriate communications go to all members, not just the primary member. Spousal participation is key to member involvement. (Currently, the V/C for Administration is working with HQ staff on techniques to stratify and select target audiences based on a variety of criterial according to type of communication needed.)

- Publish a **consolidated contact list and Help Guide** for Club officers, a simple shortcut page to more easily find who to contact for what information and for different kinds of assistance.

- Pre-record Club officer training. The current OT program contains great information and could be organized into chapters and produced online for Club officers to access at their convenience and as an ongoing reference.

- Create a group of volunteers to work with committees and ITCom for appropriately reconfiguring and updating committee web pages to improve user navigation, simplify content,

and enhance the user experience. This group would also create specifications for simplifying the entire member website (usps.org).

  - Promote and facilitate the continual update of each committee's web pages. Many committee pages are out of date, hard to navigate, and overly cluttered.
  - Update and simplify the National member website (usps.org) so that members and Clubs can more easily find what they need. Consolidate and organize the *Site Index* and *How Do I* pages by type of user, such as "For SEOs", "Member Portal", "Committee Information", and so on.

- Update the Standard Squadron Site (SSS) in appearance, ease of use, content, and use for marketing and recruiting at the Club level. Attempt to better match the established organizational branding in the public site at www.americasboatingclub.org. Research and incorporate ideas and functionality found in successful Club and District sites (such as in D10 and D22). Consider establishing a collaborative approach for re-design with knowledgeable Club and District representatives.
- Encourage the adoption of standardized Club website appearance and functionality where possible.
- Develop a formalized and ongoing system to proactively provide ITCom with policy oversight and guidance to help them use volunteers efficiently to focus on activities that meet organizational goals and priorities.
- Work with ITCom to obtain adequate resources and expertise in modern technologies, programming techniques and approaches, and fresh insights to address new problems. This may require funding to hire temporary outside paid coders and application developers to work under ITCom supervision on specific projects as necessary.

Respectfully submitted,

Aide/CC Paul Mermelstein, Co-Chair
D/C Allan Bombard
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