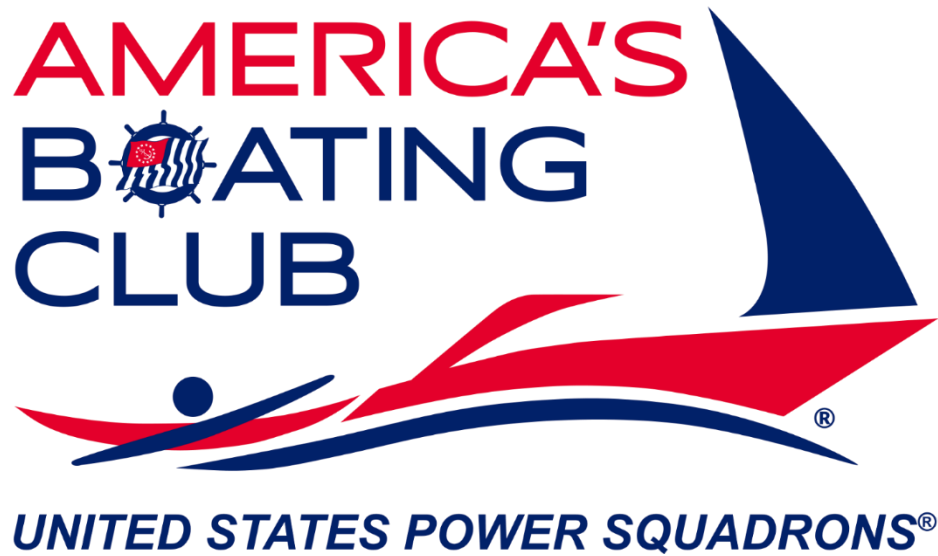


REORGANIZATION PROPOSAL



February 22, 2022

REORGANIZATION PROPOSAL

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REORGANIZATION PROPOSAL

1. WHY WE NEED TO REORGANIZE

- Shrinking membership over several decades
 - Total members now less than 20,000; declined of 50%+ in 10 years
 - Recruiting challenges; Clubs continue to have difficulties
 - Retention – 50%+ of new members don't stay; *we are not meeting their needs*
- Tiny Districts and Clubs
 - All Districts affected; over past 10 years every District has declined in members
 - 3 Districts have less than 200 members
 - Only 5 Districts have over 1000 members.
 - 93% of Clubs show a downward trend over 10 years
 - 88 Clubs (about a quarter of all Clubs) have less than 25 members
- Lack of member volunteers to get the work done
- Leadership and staff positions are hard to fill
- Communication & coordination is poor; members & Clubs feel out of touch
- Lack of engagement
 - Attendance at District and National events declines
 - Non-committal member participation and engagement for events
- Erosion in public perception of who we are and what we do; much of the boating public does not know us by any of our names
- The number of students taking courses and seminars is declining
- Harder to fulfill our mission of educating boaters; we have lost our prominence in boater education

2. GOALS OF REORGANIZATION

- Enhance the attraction of America's Boating Club to increase member recruitment and retention
- Meet the needs of members to keep them satisfied and engaged
- Preserve and strengthen Club capabilities to serve their members
- Reduce burdens on Clubs and allow more freedom to do what they feel necessary
- Bolster the capabilities of local Clubs to market and teach boating education

- Where necessary, directly provide education to individual members such as cyber-members and Club members who do not get adequate education locally
- Increase opportunities for members to participate in boating events and social activities
- Reduce red-tape and bureaucracy to streamline services, administration, and coordination
- Improve communication to Clubs and to all members
- Provide better marketing and management tools to Clubs and undertake more National marketing campaigns

3. PROJECT SCOPE

- Describe improvements to our operations that will meet above goals
- Identify how improved operations should be supported by
 - Volunteers
 - Paid staff
 - Funding
- Identify skills and capabilities of support staff and volunteers
- Specify roles and responsibilities
- Identify HQ support staff required
- Identify process for policies and By-Laws changes
- Identify requirements for automated support for intended functions
- Revise our organizational structure to better support functional changes and operations
- Analyze impact on membership dues and allocation

4. RECOMMENDED OPERATIONS

Many National departments and committees need to be refocused, streamlined, and redesigned to align better with the goals and conclusions above and the Reorganization recommendations that follow. Going beyond simply publishing guidelines and giving out awards, we must be more proactive in communicating with Clubs, informing them of the specific assistance that is available, and if requested become engaged to provide the help Clubs need.

Any functions that do not directly help Clubs and members should be examined for deletion or reassignment; for example, the value of awards, functions that serve only National

operations, and other activities with low intrinsic value. Obviously, a good hard examination of what we do should be associated with why we do it and the value it produces.

Departments and committees should examine their organizational structure, positions, and roles and responsibilities to ensure more efficient and effective outcomes.

4.1 Who Is the “Customer” or Intended Beneficiary?

- It is important to recognize we have multiple constituents with different needs and methods to keep them satisfied
- Reorganization will need to simultaneously address several constituents (which are sometimes perceived as conflicting or competitive)
 - Active Clubs and their members
 - Marginal Clubs that are salvageable
 - Club members whose needs are not being met by their local group
 - Cyber-members
 - Future members
- Both education and social relationships matter; the combination is necessary to attract and keep members satisfied

4.2 Education

- We need to provide options, so that education can be provided both Nationally and by local Clubs (instructor-led, both in-person and online)
- It is up to the member or potential member regarding how they wish to obtain their boating education. We need to provide them with alternatives and ease of access.
- The Educational Department needs to upgrade many of its educational programs
 - Update material to reflect continually evolving boating technologies, changes in law and regulations, contemporary equipment, and so on Much of our material is noticeably out-of-date
 - Update delivery systems to include more dynamic content including more electronic documentation and presentation, animations and videos, blended learning approaches, electronic testing, and so on
 - The Educational Department should develop stand-alone presentations to update existing courses and seminars with “what’s new” material, aimed at members who have taken the course/seminar previously to keep them engaged
 - The Educational Department needs to reconfigure its operations so that development and updates are accomplished much more quickly
 - The Educational Department should consider using paid course/seminar development staff to supplement or replace volunteer resources

- The Educational Department should update instructor training/development to reflect contemporary educational approaches, such as use of teaching technologies, blended learning, etc.
- Clubs – Shall continue to offer courses and seminars, including at least one public course annually to maintain their 501(c)3 designation
- Districts do not typically conduct educational activities, except in rare circumstances. Education that is provided across a District or Districts is conducted by a Club within the District, not the District itself.
- National Educational Department support for Clubs:
 - Seminar pricing – keep current system for seminars conducted by Clubs; there is no charge from National per student except for one time instructor kit and optional registration for credit.
 - Current pricing for courses – no change in approach. Prices may or may not change, but if they do, probably only marginally
 - In support of Clubs, National continues to provide course/seminar content and teaching materials for instructors and students
 - More eBooks and electronic teaching tools, including electronic testing for Clubs teaching online
 - The Educational Department should provide additional tools and “How To” guidance to support Clubs to enhance Club teaching capabilities
 - The Educational Department should create blended teaching approaches that Clubs may access if desired as part of their curriculum
 - Online exams to supplement in-person exams
 - Online courses and seminars
 - Local Club discussion guides
 - Blended learning guidelines and suggestions
- National direct education – May teach individual members and groups of members, that belong to cyber or physical Clubs
 - Via Virtual Classroom/LMS
 - Webinars
 - Synchronous online sessions with qualified instructors
- The Educational Department should inform local Clubs about other students in the Clubs’ catchment area so a Club can establish relationships for recruitment and retention

4.3 Boating and Social Events

- 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
 - Club culture needs to be more welcoming and inclusive. Satisfaction survey comments and exit surveys indicate new members often feel isolated
 - 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
- Participation and quality ratings for District social and boating events is poor to mid-level; District events are mostly attended by current and past officers
- Members are not satisfied with the quantity or quality of boating events
 - 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
 - Dissatisfaction is particularly evident for newer members who joined with boating events in mind, according to the survey
 - The lack of boating events does not reflect our name *America's Boating Club*
- Clubs will continue to arrange and conduct boating and social events. Local Clubs encouraged to:
 - Hold events locally
 - Invite members from other nearby Clubs
 - Form informal consortia of local Clubs to conduct boating and social events
 - Communicate with National by entering all events into National database
- National should provide an automated event scheduling system, calendar, and database for local Clubs/groups to promote and coordinate with members in their areas
- To supplement local Club events, National should utilize these same calendar systems combined with targeted email campaigns to schedule, promote and arrange boating and social events in various locations
 - Audience includes all members and potential members, especially where local Clubs are not active on the water
 - Shall coordinate with local Clubs if available
 - May directly host event but will need to arrange for a local representative for onsite coordination and to sever as a POC
 - The system should include links to local Clubs, if available
- National will provide HQ paid staff with event planning experience. They will coordinate with local Clubs and groups of Clubs (see 4.6)
- Except for a few Districts that have robust and active social and boating activities, the value of continuing Districts has not been demonstrated

4.4 Communication

- Communication is a problem at all levels
- From the survey
 - Satisfaction is high for local Club news and information
 - About half of all members read the Ensign
 - Fewer read District newsletters or National blasts
 - Member satisfaction is very low for both District and National news and information; members do not feel they are kept informed
- Based on the survey and from experience, Clubs and members do not seem to receive information passed from Districts in a timely fashion or at all. Most Districts are challenged to fill positions and do not have volunteer resources to effectively help their Clubs or fulfill their role as communication conduits.
- Observationally, Clubs do not seem to know about news and information from National, including what tools and resources are available from National committees. National committees need to do a better job of communicating with Clubs.
- Members need informative and useful communications 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
- The communication chain needs to be shortened and should be direct from National to Members and Club leadership
 - Information changes too much in process now, and is often delayed
 - Should go to all members, not just "primary" member
 - Need to be careful not to over-communicate or under-communicate
 - National must reconfigure how we communicate with members and Clubs
- The *Ensign* needs a separate analysis of value and cost, and how to improve it. Many people read it, but members still feel out of touch. Also, for printed copies, make Ensign subscription-based.
- The National member website (usps.org) needs to be updated and simplified so that members and Clubs can more easily find what they need
- We should encourage standardized Club websites where possible, but the Standard Squadron Site (SSS) needs updating in appearance, ease of use, content, and marketing

4.5 Membership Recruitment, Retention, and Marketing

- Improve efficacy and efficiency of Marcom, Membership, VSE, and other committees
 - Communication with Clubs regarding what help is available
 - Internal coordination and collaboration between committees and departments
 - Improve simplicity and usability of tools, advice, and methods

- Web pages for all committees must be simplified, easier to navigate, and easier to find relevant tools and materials
- There are two sources of marketing and recruitment that need improvement
 - Local Clubs and members
 - National
- Local Clubs
 - National should provide tools and resources directly to Clubs regarding:
 - Recruiting members
 - How to create goals & timelines (provide template)
 - Techniques, methods
 - How individual members can be more effectively leveraged as a resource to recruit new members and keep them engaged
 - How to be more welcoming and inclusive
 - How to utilize our organizational strengths as a draw, such as:
 - Education
 - Vessel Safety Checks
 - DAN (Divers Alert Network) benefit
 - How to be more active and have more events (see 5.3)
 - National will help Clubs identify and recruit cyber-members
 - Provide the data
 - Provide techniques and suggested approaches
 - Local Clubs can do what they feel necessary, as long as branding standards and guidelines are maintained
- National direct marketing
 - Promote member recruitment and education to the boating public
 - Conduct intensive, well-funded National recruitment and retention campaigns including advertising and promotion, email campaigns, website updates, special bundles/discounts, and promotions as appropriate
 - BOD will designate a specific line item budget annually as an ongoing investment
 - National Marketing will coordinate with local Clubs, inform general membership FYI, etc.

4.6 Support Systems

- Enhanced Club Support & Development committee
 - May be developed from Squadron Support & Development Committee
 - Revised mission, vision, goals, objectives
 - Not just for self-declared struggling Clubs; once Clubs are below membership and activity thresholds, it's too late

- Identify Clubs prior to fail-safe position
 - Need to develop a monitoring system
 - Criteria for Club health (education schedule, events calendar, bridge composition, membership trends, etc.)
- Collaborate with Club leadership
- In-person visits, where necessary, shall be reimbursed
- Led by a Committee Chair
- Reports to NAO
 - Squadron Activities Committee and Squadron Support & Development Committee should be reorganized and refocused
 - Any current functions that do not directly enhance member recruitment and retention should be evaluated for elimination, reconfiguration, or reassignment as appropriate
- Paid staff
 - HQ will need to implement certain changes to procedures, automation, and staffing to support the recommendations in this proposal
 - We WILL need a couple of paid staff to for the revised organization
 - Event planning and coordination
 - Send/receive communication with Clubs and members
 - Serve as customer/member service representative
 - We MAY need paid course development staff for Education (see Education, above)
 - **We do not want to increase staffing costs**
 - **We want to maintain budget neutrality**
 - **We will address additional automation of HQ sufficient reallocate up to two staff members for reallocation to support reorganization ongoing**
 - **We will need to work with ITCOM, HQ leadership, and BOD**
- Information Systems
 - Many of our legacy information systems were created many years ago. Most need updating both functionally and technically; system integration is a challenge.
 - We will need additional information systems and tools to coordinate, schedule, and manage education, boating activities and social events across the organization.
 - We also need to better automate manual functions at HQ and streamline activities associated with creating and disseminating information as well as database management and administration.

5. RECOMMENDED ORGANIZATIONAL STRUCTURE

All organizational changes must benefit members and Clubs. Maintaining the current organizational structure is not the objective. All structural improvements must be designed to enable the operations improvements described above to succeed.

5.1 Options We Evaluated

- Option 1: Do Nothing
 - Pros – Less organizational turmoil
 - Cons – Continues the decline; organization dies

- Option 2: Rely More on Districts
 - Description – Allow Districts to reduce bureaucratic burdens and undertake an active role in Club membership growth, education, social & boating events, and Club stabilization/growth
 - Pros – Less organizational turmoil for a few Districts; consistent with desire for some Districts to continue personal relationships
 - Cons – Only a few Districts have sufficient volunteer and leadership resources; historical data not encouraging; current model is not working for most Districts; no reason to believe this would work nation-wide. The survey data supports this conclusion.

- Option 3: Consolidate Districts Into Regions
 - Description – Replace Districts with regions with strong leadership equivalent in level to National committee chairs and sub-chairs; responsible for collaborating and assisting Clubs with education, social & boating events, membership growth, and Club stabilization/growth; expanded active role in Club support; few bureaucratic requirements; serves as intermediary between National and local Clubs; directly serves unattached and cyber members in their geographical areas.
 - Pros – More resources available due to aggregation from Districts; can focus on Clubs and systems specific to their catchment areas
 - Cons – Would need a leader and support volunteers for each region; can be confused with a super-District; may actually morph into a super-District; paid support staff time must be allocated to each region; some duplication of effort and systems between regions.

- Option 4: National Level Club/Member Services
 - Description – Replace Districts with coordinated, centralized support directly to Clubs and members; specific resources focused on Club issues, member education, boating & social event coordination, customer/member service;

direct communication with Clubs via both paid customer service staff and improved website resources

- Pros – Better meet needs of Clubs and members; direct line to Clubs and members; more accountability; easier to manage paid and volunteer staff time allocation; smaller number of required volunteers; utilizes paid staff for event planning and customer/Club/member service
- Cons – More disruptive; broad scope of responsibilities; requires more changes and reorganization at National as described above; requires paid staff; during the transition there may be some confusion and clear communication will be required.

5.2 Recommended Organizational Structure

National Level Services with Informal Consortia of Area Clubs

- Description
 - National provides coordinated, centralized support directly to Clubs and members
 - Specific resources focused on Club issues, member education, boating & social event coordination, and customer/member service
 - Direct communication with Clubs via both paid customer service staff and improved website resources
 - Paid staff directly in support of reorganization administratively report Executive Director at HQ and functionally to the NAO
 - Clubs are encouraged to form informal consortia to collaborate on social activities, boating events, and education as many do already
 - Individual Districts may discontinue operating or transform into an informal consortium of Clubs; the Clubs make that decision
 - No administrative burden placed upon consortia from National
 - No financial support from National
 - Must be self-supporting with financial and volunteer resources provided by local Clubs within the area
 - Decided by Clubs within each area
- Pros – All the benefits of the National Services model; facilitates local decisions about collaboration with other Clubs via consortia; no requirements or burdens from National; facilitates both local Club and consortia coordination with National services; provides more authority to Clubs via direct interaction with National; provides options for Districts to either transform or discontinue operating as appropriate; as consortia Districts and area Clubs are free to socialize and boat without the red tape and associated workload of operating a formal organizational entity.
- Cons – Same as Option 4 described above

6. IMPLEMENTATION

6.1 Highlights

- Rigorous examination of the By Laws and preparation of proposed changes.
- *Implementation Teams* composed of departments and committees that plan for and implement major changes in this proposal. They can begin some operations improvements almost immediately since many improvements need to be done anyway.
- Series of online Town Halls with Districts, Clubs, and members to explain the proposal, how reorganization will work, and the anticipated benefits.
- Reorganization Steering Committee composed of current and past leaders from Clubs, Districts, and National with experience running organizations, planning major initiatives, and managing large projects.
- Advisory group composed of Club leaders; Clubs and their members are the beneficiaries of reorganization.
- Special GB meeting and approval online so that more GB members can attend and we can have more representation directly from Clubs and Club leaders.
- The work will expand and continue for one year after GB approval. That is our target.

6.2 Summary Task List

No.	SUMMARY TASKS AND MIILESTONES	TIMELINE
1	BOD Approval	2022 Annual Meeting
2	Establish Process for Special GB Meeting and Vote	Mar-22
3	Assess and Prepare Required Changes to By-Laws	March-May 2022
4	Assemble Implementation Teams for Internal Assessment	April-May 2022
5	Implementation Teams Begin Implementation of Operational Improvements	April-June 2022
6	Conduct Online Town Halls	March-May 2022
7	Finalize Detailed Implementation Plan	May-22
8	Conduct Special Electronic Meeting and Vote by the Governing Board	May-June 2022
9	Form Reorganization Steering Committee	Jun-22
10	Form and Conduct Meetings of a Club Advisory Committee	June 2022-June 2023
11	Organizational Restructuring & Continued Operations Improvement	July 2022-June 2023
12	Conduct Bi-Monthly Meetings with Implementation Teams	July 2022-June 2023
13	Provide Monthly Updates to BOD	July 2022-June 2023
14	Full completion target date	Jun-23

6.3 Implementation Plan Description

As Departments and Committees address the tasks in this plan and as described in this proposal, the Implementation Plan will expand and add detail.

1. BOD Approval (2022 Annual Meeting)

- Approval of this proposal

2. Establish Process for Special GB Meeting and Vote (March 2022)

- For anticipated GB vote at special meeting (discussed later)
- Re-confirm NC law regarding rules regarding electronic meeting & voting
- Determine procedures, online software required, any required forms and documentation for online voting

3. Assess and Prepare Required Changes to By-Laws (March-May 2022)

The following should be completed prior to a vote by the GB and implementation

- Review existing National and Squadron By-Laws and identify required modifications related to or referencing Districts **(March 2022)**
- Prepare modifications **(April 2022)**
- Finalize proposed changes to By-Laws **(May 2022)**

4. Assemble Implementation Teams for Internal Assessment (April-May 2022)

- An *Implementation Team* for each affected department and committee will review the intent of this reorganization and the impact on their areas
 - Assess required changes to department and committee operations and internal organizational structure
 - Identify specific tasks, timetables, and resources for their respective areas to implement changes required for reorganization
- At a minimum, teams will include
 - Administration
 - Communications
 - Education
 - Finance
 - HQ leadership
 - Information Technology
 - Law
 - Marketing
 - Operations Manual
 - Planning
 - Public Affairs
 - Rules
 - Other stakeholders as identified

- Many specific recommendations for Education, Communication, and recruitment/retention are listed above. Additionally, *Implementation Teams* will evaluate the following areas and prepare a report on tasks and timelines required to improve operations and follow the intent of reorganization:
 - Internal organizational structure, roles, and responsibilities
 - Functions that do not directly contribute to servicing Clubs and members
 - Functions that do not directly contribute to member recruitment & retention
- Team leadership must be strong, open minded and committed to devote the time necessary to the task
- *Implementation Teams* will report to the *ad hoc Reorganization Committee*
- Teams will coordinate with the *ad hoc committee* with periodic progress reports
- Teams provide report on required changes and timelines by **May 31st**.

5. Implementation Teams Begin Implementation of Operational Improvements (April-June 2022)

- Many of the recommendations in this proposal improve operational efficacy and should be accomplished on their own merit. For many operational changes, it is not necessary to change by-laws or obtain approval from the Governing Board.
- *Implementation Teams* and other departments/committees can start moving forward on improving their internal operations accordingly
- Communication
 - The ad hoc committee will establish a multi-disciplinary *Implementation Team* specifically to address communication issues described in this proposal
 - It will consist of National, Club officers, other leaders and HQ staff
- ITCOM
 - Create a process for all departments to identify what needs to be changed on their website pages to reflect recommendations of the Reorganization plan
 - Develop a plan for modifying the member site to mirror the look and feel of the Public site, improve ease of navigation and finding content, and streamline the entire site
 - Identify anticipated improvements to the Standard Squadron Site so it looks like the public site and meets remaining Club needs
 - Identify and assess database changes and information systems updates required to later implement operational and organizational improvements
- The Educational Department
 - Identify all educational materials older than 5 years and determine its life span
 - Research and come up with a proposal to update materials with either volunteers or to utilize paid specialists (cost/benefit analysis required)
 - Identify and assess additional operational and organizational changes required to later implement Reorganization

- The Administration Department (see Section 4.6)
 - Work with the *ad hoc Reorganization Committee* and ITCOM to identify procedures and associated online applications for calendaring, scheduling, and conducting events by Clubs and consortia
 - Change the references of “squadron” to “Club” on their website and all materials
 - Evaluate this proposal to identify required changes to the department organization and operations to directly support Clubs and to operate the event planning functions described herein
 - Identify and assess additional operational and organizational changes required to later implement Reorganization
- The Secretary’s Department
 - Evaluate the Operations Manual for required changes to reflect a modified organizational structure without Districts and to simplify Club operations and organization consistent with the goals expressed in this reorganization proposal
 - Determine the role and expanded functionality of the Communications Committee
 - Identify and assess additional operational and organizational changes required to later implement Reorganization
- Other stakeholders
 - All other departments and committees shall review this proposal and identify organizational and operational improvements

6. Conduct Online Town Halls (March-May 2022)

- Conduct three (3) Town Halls online
- Participants include Clubs, Districts, National committees, other members of the Governing Board; open to all members
- Explain the benefits of reorganization
- Present recommendations and address questions/concerns about how it will operate and about implementation
 - To-date, leadership in most Districts have received several presentations and held meetings
 - Reorganization has been discussed at many District Fall Conferences both with and without the National representative
 - All members were notified of the article published in the *Ensign*
 - All members were invited to complete the satisfaction survey

7. Finalize Detailed Implementation Plan (May 2022)

- Based on the input from Implementation Teams and feedback from Town Halls, we will expand and finalize the overall implementation plan including timelines, interdependent tasks, deadlines, and resource requirements
- The implementation plan will identify specific tasks and responsibilities for
 - Each department and committee

- Districts, regarding their decisions to discontinue or transform into a consortium
- Interfacing with Clubs including
 - Assistance on creating informal consortia or formal mergers
 - Communication processes
 - Responding to requests for assistance
 - Enhancing scheduling and promotion of boating and social activities
 - Supporting educational programs

8. Conduct Special Electronic Meeting and Vote by the Governing Board (May-June 2022)

- **May:** Send out invitation to GB members at least 30 days in advance
 - Invite all eligible GB members, especially including squadron/Club voting members
 - All members may attend (per the USPS By-Laws only GB members will be able to vote)
 - Ensure individual local Clubs are directly represented
- **June:** Conduct the meeting and vote

9. Form Reorganization Steering Committee (June 2022)

- Many members of the current *ad hoc Committee* continue
- Supplement with others as needed
- Manages implementation, oversees *Implementation Teams*, reports to BOD

10. Form and Conduct Meetings of a Club Advisory Committee (June 2022-June 2023)

- Composed of Club representatives (approx. 8-10)
- Advise the *Steering Committee* on emerging Club issues, reorganization implementation, and needs to be addressed via Reorganization process
- Formed soon after GB approval and participates throughout reorganization

11. Organizational Restructuring & Continued Operations Improvement (July 2022-June 2023)

- The Implementation Teams and other Departments/Committees continue implementing internal operational changes
- Affected Departments/Committees undertake the transformation and reformation of their organizational structure
- Clubs explore and form optional consortia, including deciding whether or not to transform the District or parts of a District into consortia
- Procedures and improved operations to support Clubs will be phased-in
- Begin and continue ongoing communication directly with Clubs

12. Conduct Bi-Monthly Meetings with Implementation Teams (July 2022-June 2023)

- Schedule meetings with all involved teams
- Appropriate Vice Commander should participate
- Conduct meetings to review progress, identify obstacles and issues, and resolve problems
- Unresolved problems will first be referred to appropriate VC and included in periodic BOD updates
- In-person meeting(s) at National meetings

13. Provide Monthly Updates to BOD (July 2022-June 2023)

- Written update with summary and supporting detail
- Track progress and upcoming tasks
- Summarize issues and resolution

14. Full completion target date (June 2023)

- Organizational structure changes will be complete
- Operational changes will be complete
- Continuous process improvement, automation enhancements, and increases in service efficiency should become the norm going forward

Respectfully submitted February 22, 2022

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