HOW TO CREATE A PROJECT TOOLKIT FOR YOUR LOCAL CHAPTERS

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INTRO

WHY CREATE A PROJECT TOOLKIT?

IN A GIST

Toolkits developed at the national level will provide all chapters with the same information, tools, or resources.

An often overlooked resource at the national level of an association is the value and impact of its chapters. While the relationship between the national and local levels can take many forms, ultimately both share the common goal of serving their members. If we focus on service, we can begin to identify ways to reinforce each other's efforts and increase member value.

One such way to accomplish this is through project toolkits developed at the national level to provide all chapters with the same information, tools or resources. These toolkits can be used to better align chapters with national strategic plans or agenda items while providing common local threads. For example, if a national strategic priority is to raise awareness of the association among members' clients, you could create a media toolkit with template press releases, talking points, and a step-by-step guide on how to secure press coverage.

Let's take a look at the steps involved in putting together your project toolkit.

STEP 1:

IDENTIFY

WHAT ARE THE COMMON CHALLENGES AND INTERESTS?

IN A GIST

The task starts by determining what the national organization and local chapters need to align on.

The first step in developing a toolkit is to determine what national could provide that would be mutually beneficial. If you approach this as just a way to get the chapters to support something that is important to national—but perhaps is not a priority for the chapters—the project will most likely fail. When I create a toolkit, **I start by talking with members and staff at both the national and chapter levels to identify common challenges and interests.** In doing this, not only am I able to determine what kind of kit would deliver the most value, I also find member and staff champions to support the toolkit's development. Some example toolkit ideas include:

- **How to recruit and retain a target member audience** (e.g. early career members);
- **Increase knowledge of new national standards or guidelines** (e.g. worker safety or patient care quality improvement);
- **Create community around common sub-specialties** (e.g. if you have non-geographic components—sometimes called membership sections—at the national level, providing resources to foster these at the local level).

To elaborate on the first bullet, staff and members generally agree on the value of recruiting and retaining younger members, but since national has more resources to dedicate to this initiative, it has developed a strategy, while only a handful of chapters have. In this situation, a toolkit can pull from the national strategy and the chapter examples to provide a relevant resource that supports a common goal.

STEP 2:

MANAGE

WHO ARE YOUR STAKEHOLDERS AND HOW DO YOU MOBILIZE THEM?

IN A GIST

Some project management tips to get you going.

Once you have determined the subject of the toolkit, you need to gather your stakeholders. In my experience, toolkits are most successful when they are developed by a representative group. So for the media toolkit example, I would include someone from the association's public relations team, a few members with expertise in securing positive press coverage, plus chapter member leaders and staff that will be using the kit. Also keep in mind that if your chapters vary greatly in size you need to recruit volunteers from various budget bands to ensure their perspective is included.

With your development team in place, you should then agree on a regular meeting schedule. The goals of the first few meetings should include:

- **Identifying each person's areas of expertise and passion;**
- **Brainstorming the mission and vision for the toolkit;**
- **Agreeing on a timeline for the toolkit's creation.**

I generally find that as the group discusses the ideal components of the toolkit, individuals begin to raise their hands to volunteer. As a result, the creation plan is built through these initial discussions. Additionally, if the group identifies something that they want in the toolkit but none of them are able to provide it, you find out early enough in the process to recruit the necessary expert and include them in such a way that they do not feel like an afterthought.

MANAGE

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Now equipped with a plan, a timeline, and the right people, they can begin creating the toolkit. I strongly recommend that your group meet at least once a month—or more often—depending upon your development timeline. This keeps everyone engaged and provides deadlines.

Likewise, at the end of each meeting, summarize the next steps verbally, then send an email to the group with those next steps and who has claimed responsibility for each. The latter is key because people are busy and will appreciate having a document to refer to. Depending on the members, I may even send calendar appointments for project milestones to the responsible person, e.g. an appointment to John Smith reminding him he promised to send the group template press releases by Oct. 10. Go the extra step and include all the members' email addresses in the appointment.

Remember that as the project manager you are asking people for their time and expertise, so do everything you can to make the process as easy for them as possible. While such measures might seem trivial, they are appreciated and increase the likelihood that this experience is a pleasant one for all involved.

STEP 3

PARTNER

WHAT LOCAL INITIATIVES ARE WORKING AND CAN BE DUPLICATED?

IN A GIST

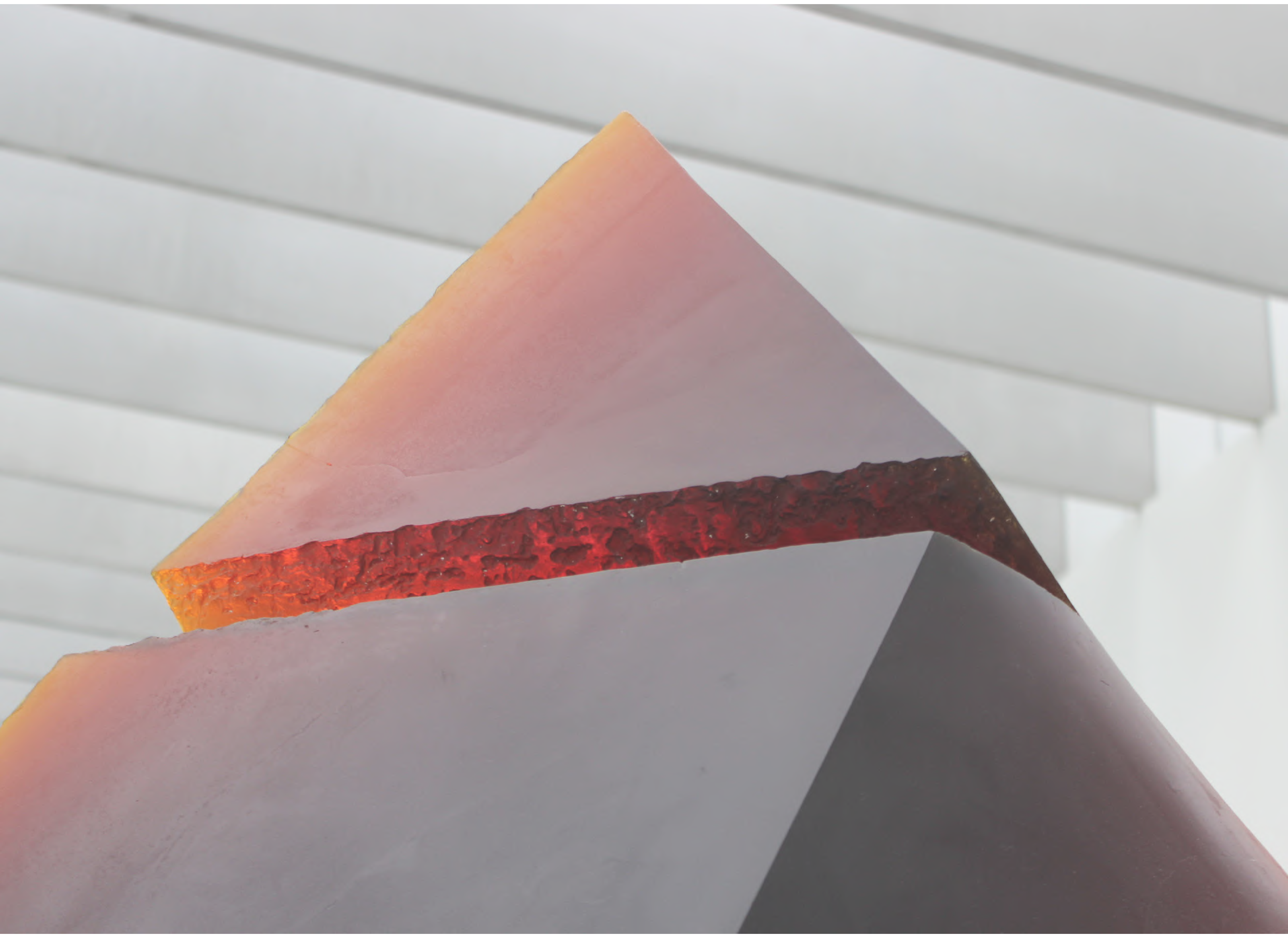
Collaborate with your local chapters to identify examples to include in your toolkit.

While you have some representatives on your development team, your outreach to the chapters is not done. **Someone in the group should contact them asking about their experiences, if any, on the topic of the toolkit.** As the project manager, I usually take on this task at the very beginning when I am contacting chapters to identify common challenges and interests. However, if you are not a national chapters staff person and your association has such a team, you may find that they would rather take on this role, so make sure you discuss this with them first.

Let us return to the example of recruiting and retaining early career members. From my discussions with staff at the national and local levels, as well as with early career members and chapter member leaders, I knew this was something most chapters were struggling with but some were not. After the discussions, we decided to survey the local chapter executives about their current initiatives. While not every chapter responded, many did. The data we collected allowed us to:

- **Determine the most common current activities to ensure we included those in the toolkit;**
- **Provide peer examples, which has the added benefit of making the activities more approachable;**
- **Identify new ideas for future editions of the toolkit;**
- **Parse activities by chapter size.**

The latter is especially important because it helps you take what I call a "no excuses"



PARTNER

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approach to toolkit development. By this I mean that I can provide templates in the toolkit for chapters at every size and budget band.

I think of this as a pyramid. **At the base are the most common initiatives that have little to no financial investment**—although they likely have some sweat equity! For early career members, an example could be that with the toolkit the national office provides a list of all current and potential early career members from its database. Along with this information, the toolkit will include template emails, letters and phone conversations to guide the chapter staff and member leaders towards the goal of engaging these members. This is something every chapter should be able to do. Depending on the project, national may even want to send the chapter flyers or brochures to distribute (which could have prepaid postage), thus further reducing the cost to the chapter.

Continuing with this example, **in the middle of the pyramid is an educational program targeting early career members.** The toolkit will include a sample meeting agenda and PowerPoint presentation from a chapter that has successfully held such an event. Ideally, you will also be able to suggest local speakers, but if not, see if someone from the model chapter is willing to discuss how they found speakers or write a tips sheet to include in the toolkit. **At the pyramid's pinnacle will be the most expensive activities that will not be within the reach of every chapter.** For example, offering travel awards for early career members to attend a chapter or national meeting. If your association offers a chapters recognition program, I recommend tying toolkit implementation to the criteria, but scaling the implementation level to the budget of each chapter.

STEP 4

DISTRIBUTE

HOW DO YOU FINALIZE YOUR TOOLKIT AND MAKE SURE IT IS EFFECTIVE?

IN A GIST

Once the toolkit is complete, the work isn't finished yet.

At this point, between your group members' work plus the templates and examples from the chapters, the toolkit should be coming together quite nicely. Once you have a completed a draft, dedicate at least two group meetings to reviewing it and providing feedback. Often, group members will have valuable suggestions for parts of the toolkit they did not write. Also, by having the group review the draft, you will get reactions from all of your stakeholders. After these discussions you will have a final draft. Now I recommend you send that draft to at least the chapters whose examples you are using in the toolkit. **Ask them to review the entire kit—not just the part they contributed to—as this is a great opportunity to not only ensure you properly represented their work, but to get user feedback.**

After this step, you have a final toolkit that is ready to send out.

How your association distributes the toolkit will depend upon national's relationship with the chapters and any existing processes. Regardless though, make sure your distribution plan includes getting the toolkit into the hands of both the member leaders and the chapter staff, assuming those are not one and the same. Ideas for marketing the toolkit include:

- **Emailing the toolkit** to the elected member leaders and chapter staff;
- **Mailing hard copies and/or a thumb drive** with the toolkit preloaded to elected member leaders and chapter staff;
- **Uploading the toolkit to an online portal of chapter resources or a similar location** (e.g. Google Drive or Dropbox).

DISTRIBUTE

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- **Writing articles and/or blog posts in publications** for chapter leaders and staff explaining the toolkit;
- **Using member testimonials**—in print or video—of the effect the toolkit had on their chapter (tap into those chapters who provided templates for this);
- **Identifying a member champion in each chapter** (or a few to start) to lead implementation of the toolkit.

Consider having some or all of these communications come from the members who developed the toolkit, rather than staff. This makes the ask peer-to-peer and is often more effective.

Now that the toolkit is with the chapters you could decide your work is done, but I encourage you to do two things. First, set up a way to gauge the effectiveness of the toolkit.

This could be done in many ways and will depend upon the culture at your association. Examples include:

- **The percentage of chapters that use X number of initiatives from the toolkit** (where X varies so you can capture those who are smaller and only implement some of the most common activities as well as those that are larger and can work through the entire pyramid—include a question about this in your annual chapter recognition program and you do not create extra work for anyone!);
- **Survey the chapters after a set amount of time about the toolkit**, asking questions that help you determine if the initial mission and vision are being realized and requesting

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ideas for improvement and/or challenges the chapters faced while trying to implement the toolkit (note, this does not have to be a formal survey. It could be an email);

- **Calling chapter staff and/or member leaders to inquire about the toolkit** (often people will tell you things via phone that they are not willing to put in an email or will not think of while answering a survey—this is another time when you can ask your members from the work group to pitch in).

Any of these will give you some insights into the value of what the work group created.

The final step is to take the feedback you receive and update the toolkit on a regular basis that makes sense for your association and the toolkit. It could be every other year or, for something more time-sensitive, once a quarter.

Be sure to solicit feedback on how frequently to revise the toolkit and—perhaps even more importantly—recognize that despite your best efforts to identify and build a useful resource, it is unlikely that every chapter will implement even one activity from the toolkit. And that is all right because now you know who to start with when you need ideas for the next toolkit!

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