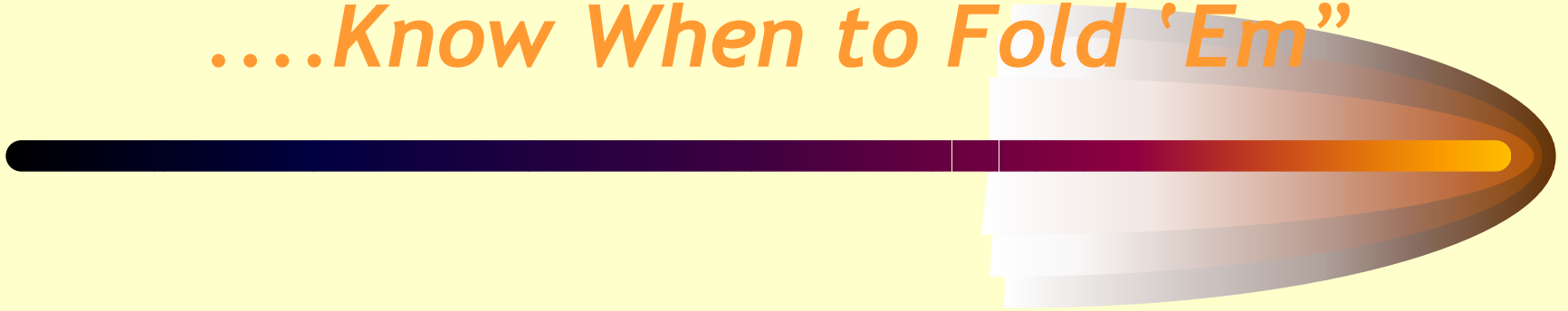


*“You’ve Got to Know When to Hold ‘Em
....Know When to Fold ‘Em”*









**Difficult Choices: A Process to Sort Your
Services...Keep, Change, Discontinue, Give away**

A Special Presentation for NABE

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Focus of this Worksession



-  A strategic approach to decisions about services
-  Involving stakeholders/members in your evaluation of services currently offered
-  How to decide what services to keepvalued by members and potential members
-  How to change services in response to wants and needs of members and potential members
-  How to choose services to discontinue or give away to other organizations
-  Anticipate challenges, opportunities, barriers

Questions to Start the Process of a Strategic Discussion of Services when Financial Resources are Limited



-  What is the organization “called” to do by our stakeholders and clients? What do **those who use our services and our members want and need?**
-  What do we really want to be? **What’s our vision?**
-  What is the **right profile** for us in these times?
-  What does **our bar association need** to operate?

What to Consider in Keep, Change, Discontinue Analysis



Priorities and criteria for future services should include those that address these areas:

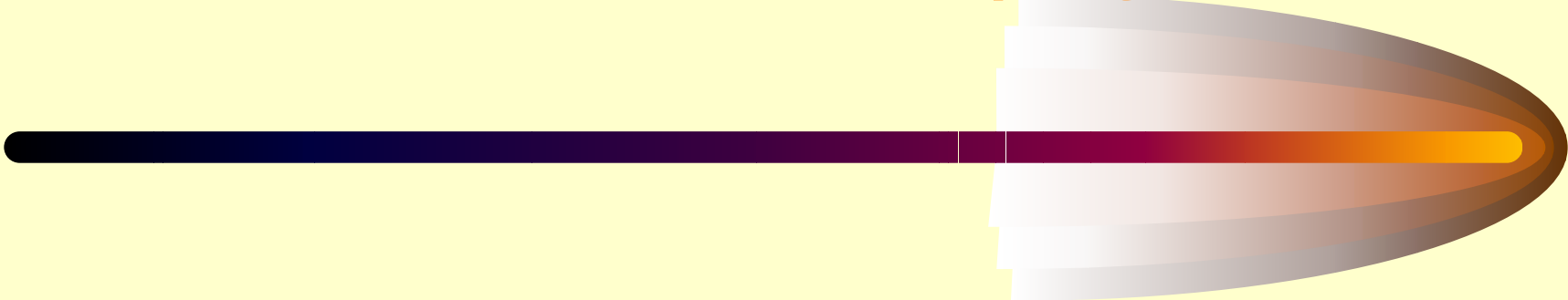
- ☞ Is it **mission related** ?
- ☞ Is it an **expressed need** ?
 - ☞ There is a **demand for it** by our customers.
 - ☞ **No one else** is providing it.
- ☞ Does it fit the organization's major **strategies/goals** or themes ?

Core Competencies/Core Services



- ⊙ What you know and what you are known for....what you do best.
- ⊙ Difficult for others to imitate, due to your unique experiences, track record, or other key opportunities.
- ⊙ May be more obvious and valued by others than by you.
- ⊙ Can be exploited to provide services to new customers/clients or add features to existing services.

Consider...when developing criteria

- 
- ☞ Are our **mission, vision, and values** reflected in this service/program?
 - ☞ Does the **need** really exist?
 - ☞ What are the **“options”** for our members or clients?
 - ☞ Is this the **first or best solution** for them?
 - ☞ What are the **trends** and does this fit?
 - ☞ Does it **help to meet our goals for financial stability and program/service delivery?**
 - ☞ Is the **risk** manageable?

Sample Criteria



- ✓ Does it fit our mission statement; fit within our association's mission and goals?
- ✓ Is it relevant and of value to members in terms of enhancing their practice?
- ✓ What is the demand for it, i.e. number of participants or attendees?
- ✓ How labor intensive is it for staff vs. the payoff...or Resources expended by us are balanced by the benefits to members (cost/benefit)
- ✓ Is it part of the strategic plan?
- ✓ What did members/users say about it on our member survey results? Was it one of their suggestions for services they would like us to provide?

Sample Criteria from a Bar Association



- 1. Is this service really a benefit for our members?**
- 2. Are they using the benefit?**
- 3. Can members get a better deal from other providers?**
- 4. Is the provider willing to support bar association through advertising or a sponsorship arrangement?**

Program Evaluation Criteria: Portland Bar Association

Criteria	Weak or No Impact (0)	Indirect Impact (1)	Direct Impact (2)
1. Linked to overall mission the bar.			
2. Linked to one of four functions of the bar.			
3. Linked to key strategic initiatives/priorities.			
4. Specific measurable outcomes achievable/achieved.			
5. Supported by membership.			
6. No one else can do it.			
7. Cost –effective to do.			
8. Promotes image of legal profession.			
9. Allows for partnerships with others.			
10. Adequate resources available.			
11. Yields a long-term benefit.			
12. Does not duplicate other program of the bar.			

Program Evaluation Criteria:
Alameda County Bar Association
Board Retreat 2003



1. Broad base of support
 - A. Reaches out to various practice groups
 - B. High demand - more than X people desire to see it implemented
2. Self-sustaining (We do not want to lose money)
3. Adheres to mission statement
4. Fits within Strategic Plan
5. Generates refunds and money for the members
6. Accessibility - Encourages people to become active
7. Provides a needed service to the community
8. Brings value (money, visibility, etc.) to the Bar
9. Attracts new members

Worksheet # 1
Program Evaluation Criteria:



1.

2.

3.

4.

5.

Discuss with Staff and Board Members



 **Strengths and weaknesses**

 **Previous goals:**

“Why they were or were not reached?”

“How have we done with our mission?”

 **Changes in customers and their needs:**

“How can we acknowledge these in our services?”

“Do we need to adjust or rethink our direction?”

 **Services:**

“Are they still relevant? needed? What is needed?”

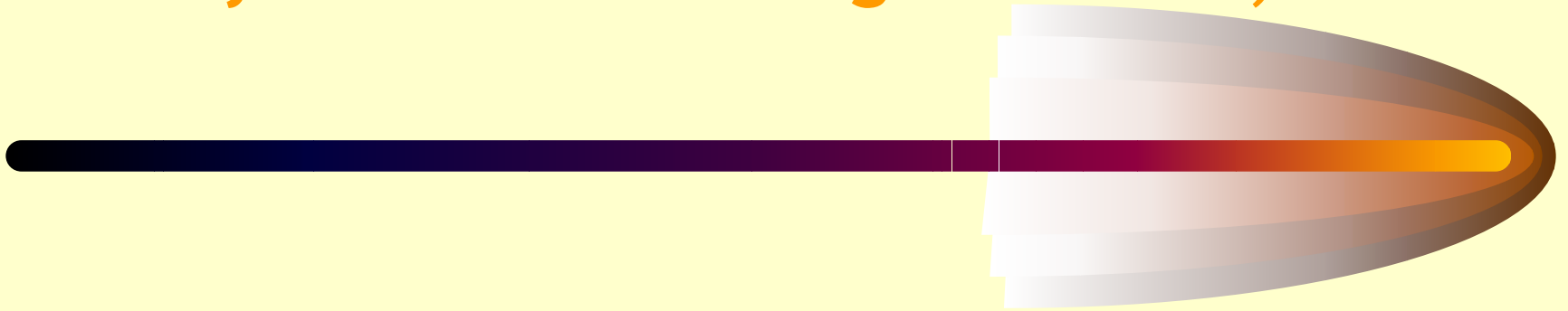
 **Direction:**

“Where should we be heading?”

A Board Retreat Agenda to Rank Programs and Services

9:00	Introductions, review agenda, goals of meeting, expectations of the day, ground rules
9:15	Discussion: Impressions from Phonathon conversations and reports, information packet: <ul style="list-style-type: none">•What “jumped out at you” surprised you, or reinforced what you expected to hear from our members?•What stands out as important? What do others want us to do?
9:45	Draft criteria for: <ul style="list-style-type: none">•Programs and Projects we undertake and continue.•Sections, Committees, and other future services to members.•Discussion, consensus.
10:15	BREAK
10:30	Trying it out... <ul style="list-style-type: none">•Sections and Committees are ranked individually utilizing their criteria (<i>2 groups of Board members</i>)•Programs and Projects are ranked individually utilizing their criteria (<i>Staff group pilots this</i>)
11:00	<ul style="list-style-type: none">•Reports back, discussion...•Suggestions:<ul style="list-style-type: none">•Sections and Committees to discontinue or change...and what changes should we make?•Programs, projects to consider changing after discussion with staff•Changes in criteria...final consensus.

Before discontinuing a service, ask:



- 📄 Who wants it?
- 📄 Who needs it?
- 📄 More people than last year?
- 📄 Can they get it anywhere else?
- 📄 Will/Can those who still want it pay for it?
- 📄 What happens if we don't provide it?

Get feedback on existing services/programs



Elicit **customer input** to decide...

- 👉 Does it still **make sense** to provide this service?
- 👉 **How could we change it** to be less staff intensive and just as effective?
- 👉 Is it **still useful** to our customers?
- 👉 Is it **still wanted** by our customers?
- 👉 Will it still be **needed in 2-4 years**? If not, **what will be needed/wanted**?

Survey Members, Lapsed Members and Never Members....

Ask:

- 🏠 **What's the best service we offer?**
- 🏠 **What do you wish we would do/offer?**
- 🏠 **What do you think we really should offer?**
- 🏠 **What services are not important....what should we discontinue?**
- 🏠 **What are our strengths and weaknesses?**

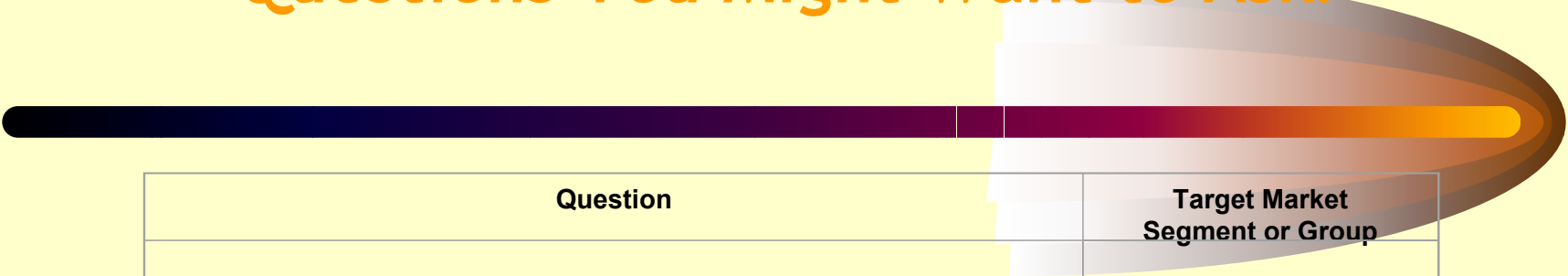
What do we want to know from these people?



1. Who really uses and values the services in the member organization or business?
2. Why do they join and continue membership?
3. What programs or services would this interviewee want from you ...if they could only pick one thing?
4. What would help to make your programs/services better and more useful for them/valuable in the future?
5. If you had to stop, or discontinue, doing a service due to budget or other reasons, what is the 1 thing that really isn't of value to them?
6. Do they use/value your communications, ie listserve, website?
7. What 1-2 specific priority or most important changes should you consider to meet the needs of local attorneys and other potential members as well as existing members?

Worksheet #4

Questions You Might Want to Ask?

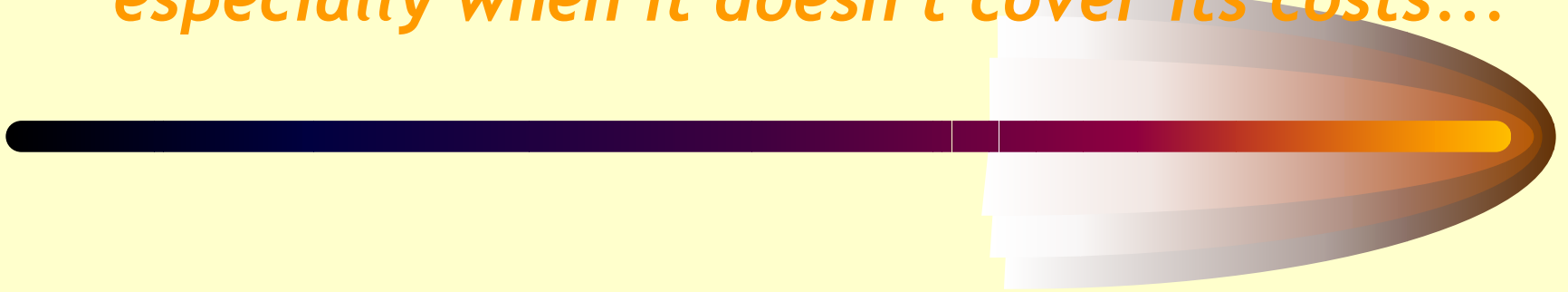
A decorative graphic consisting of a horizontal bar with a color gradient from dark blue on the left to yellow and orange on the right, ending in a large, rounded arrowhead pointing to the right. The bar has a slight 3D effect with a shadow underneath.

Question	Target Market Segment or Group

Information Gathering Plan

Group	Format	Date	Facil/Interviewer	Logistics
• Members (20)	Large Group (invite 40)		Jan, w assistance from BD members	A volunteer will call specifically identified people.
• Lapsed Members	TC		Bd/Jan	Board member will call
Never Members	TC		Bd/Jan	Staff will call
• Nonprofit groups	Focus Group after Training class..		Jan	Volunteer or staff will call or facilitate mini focus group
•				

Before a service or project gets a “Keep” -- especially when it doesn't cover its costs...

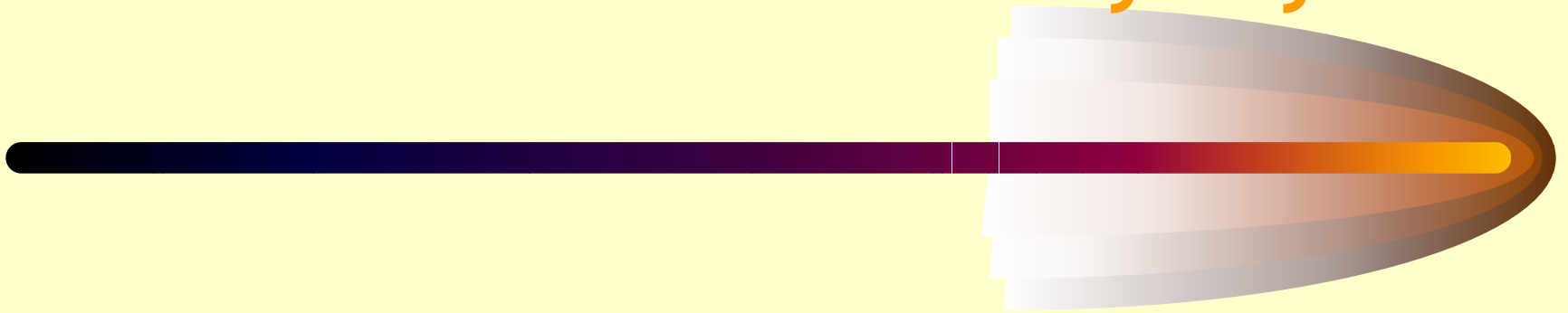


Consider:

- 📄 Does it meet a **critical need** in the market ?
- 📄 Is it **essential to the mission and vision** of the organization ?
- 📄 Does it **meet your criteria...convincingly!!**

AND before you subsidize it

Discuss whether there is any way to...



- 📄 **Generate sufficient revenue to cover the cost of providing the service.**
 - 📄 other potential users who could pay?
 - 📄 other third party funding sources?

Or...

- 📄 **Decrease the number of “person hours” needed to provide the service.**

Worksheet #5

Program Continuity Criteria: Programs to Keep or Change

Programs/Services to <u>Keep</u> or <u>Change</u>	User Group	Target Group	User Group	Customer Group
Prog/Serv #1				
Prog/Serv #2				
Prog/Serv #3				
Prog/Serv #4				
Prog/Serv #5				
Prog/Serv #6				
Prog/Serv #7				
Prog/Serv #8				

Services to Discontinue or Contract Out



Plan...

- ✓ What can you **discontinue or contract out**?
- ✓ How can you **phase it out/stop doing it/give it away** to another group?
- ✓ **Who needs to know and how will you communicate** with the publics, stakeholders, or former users of these services?

Examples of Services Discontinued by Bar Associations



✓ **Services for member attorneys:**

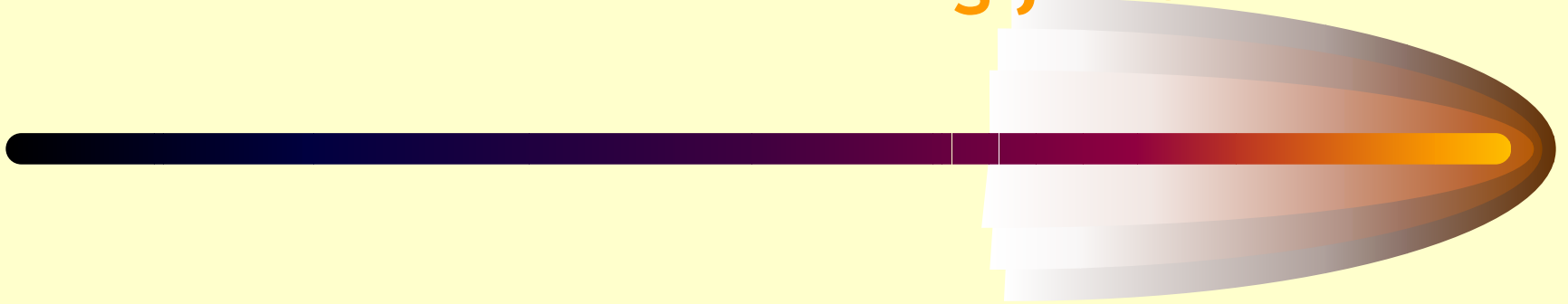
- ✗ **The "Fax Project"**
- ✗ **The solo and small firm resource center**
- ✗ **Logowear with our bar's logo and name on clothing items**
- ✗ **Hard copies of pictorial directories**
- ✗ **Group medical insurance for solo practitioners**

Examples of Services Discontinued by Bar Associations



- ✓ **Services to help the community:**
 - ☒ **Internship with Portland firms for at-risk youth.**
 - ☒ **Our young lawyer mentoring program**
 - ☒ **Oratorical contest**

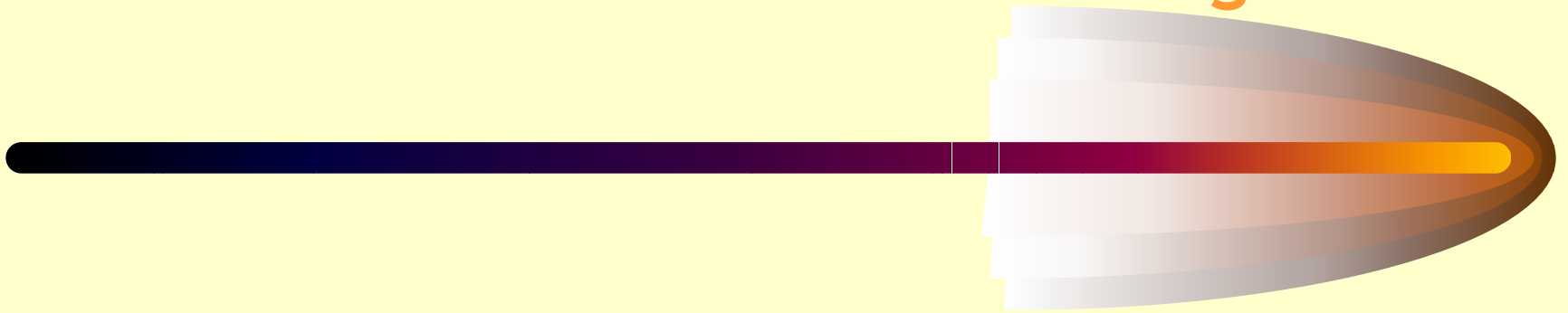
Exit/Phase out Planning for Services



Plan carefully how you will do this:

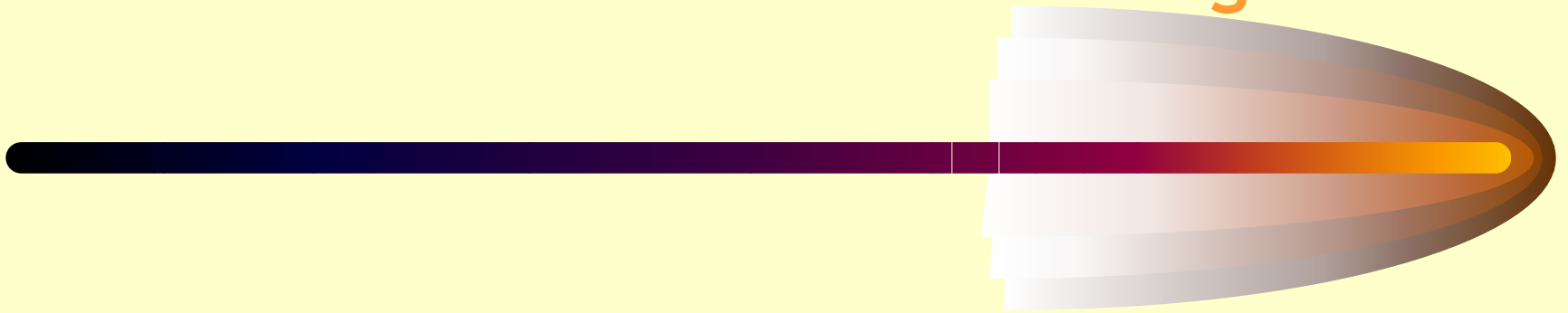
- ✓ **Consider the timing.**
- ✓ **List who you must include in the communication loop.**
- ✓ **Draft and check out what you will say... the message.**

A Focus on Services to Change...




- What did members/users say, or what can we ask them, to find out how to change this service?
- What aspects do we know we want to change and what do we want to be sure to keep?
- Is our mission/vision/core values/future direction reflected in this service? How should we change it to include or feature them?

A Focus on Services to Change...

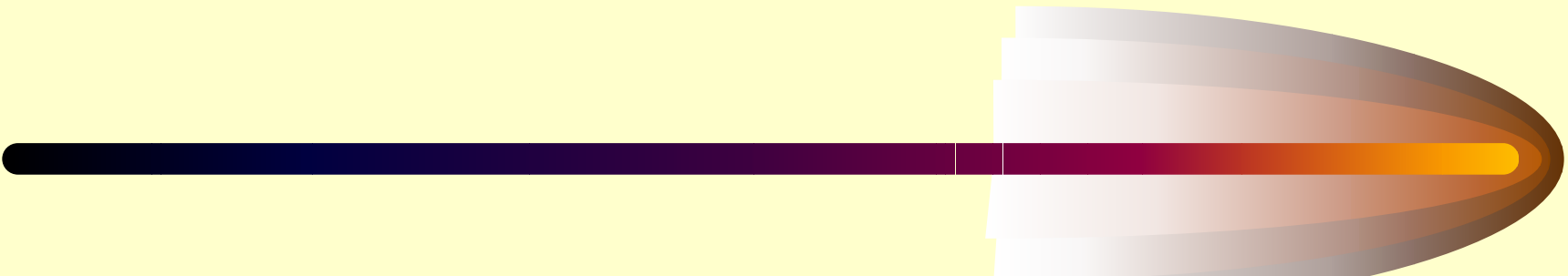


- ☞ If we were creating this service for the first time tomorrow, what would it look like?**
- ☞ What other questions, issues make it hard to us to figure out what to do, how to change these?....in preparation for worksession on strategies with Board members)**

Consider

- 
- 📄 **Can you adapt or substitute for services/programs or create packages?**
 - 📄 **Can you offer current services to other customers?**
 - 📄 **Can you, with partner organizations, create a continuum of services ?**
 - 📄 **Can you be a component of the existing one stop center, enhancing their continuum of services ?**

Partner Strategically

- 
- ❏ Work with those who give **complementary services** (or the same types of services) to the **same customers**.
 - ❏ Plan with those who give **complementary services** (or the same types of services) to **different customers**.
 - ❏ Talk to your competitors. Is **consolidation of services** a way to add needed services?
 - ❏ Meet with the "players"--the power brokers in your community.

What will result from this process?



- 😊 Your services will be streamlined and redesigned
 - 😊 You'll have the capacity to do what you really need to do,
 - 😊 You'll have plans for new partners,
 - 😊 You'll have a plan for redeploying and conserving resources.
-
- 😊 And most importantly you will continue to exist as a community services provider delivering the services the community needs...

Anticipate the Challenges, Opportunities, Barriers



What **challenges/barriers** to success can you anticipate?

- ☹️ **Resources:** Time for staff to commit to this process?
- ☹️ **Resistance:** How do you work with staff to make them a part of the process, so that they understand and accept.
- ☹️ **Financial:** What if all of your grants are restricted and cannot be shifted from the services not needed or wanted to those which are in huge demand? What strategies with funders could be used?
- ☹️ **Other challenges, either external or internal?**

Anticipate the Challenges, Opportunities, Barriers



What **changes will have to occur** to make this process successful?

☺ **Peer led** process?

☺ **Inclusion of program staff** with a role in designing the implementation of recommendations including “sunsetting of programs?”

☺ **Other?**


Anticipate the Challenges, Opportunities, Barriers



What **opportunities can result** from this process?
What good can come from it?

- 😊 **More focus on what you do best?**
- 😊 **Member and community focused services?**
Doing what they want/need?
- 😊 **Better match of human and financial resources to key programs/services** where the need is greatest and no one else is meeting that need?
- 😊 **Other?**

First steps to begin this processes with your organization?



- 📄 **Commit to the process** and to discontinuing/giving away services.
- 📄 Create and **utilize criteria** and a focused system to make decisions on services.
- 📄 Choose a **leader for this process** from the management staff of your agency