



Professional Membership Association engages members in prioritizing annual budget

We helped our client to:

- Engage members in evaluating programs
- Prioritize their portfolio against strategic objectives

Client background

Our client is a large professional membership association. Like most membership organizations, they strive to involve and engage their members in steering their future direction to ensure they stay relevant and continue to deliver the services that their members value most.

Client challenge

When the current Chief Financial Officer joined the organization he introduced a program-oriented budgeting process. This brought a lot more clarity to how and why money is spent, and has been welcomed by users of the process as a great success. It raises the question of how best to assess the programs – what criteria to use, and how to involve the right people at the right time in evaluating each of the programs.

A multi-criteria prioritization process was introduced, and on each annual cycle the client has improved the process to better meet the needs of the organization. A key requirement is ease-of-use, as a number of members are involved in the evaluation as volunteers. These volunteers all have full-time professional roles, and are based all around the USA, so it is not practical to bring them together for face-to-face workshops.

It is also vital that the process has the integrity and transparency demanded by the membership and required by the governance rules of the organization.

“Catalyze and Transparent Choice both responded quickly to requests and gave the project top priority. Both firms showed strong commitment to the success of the project.”

Chief Financial Officer

How Catalyze helped

Catalyze has partnered with TransparentChoice to offer web-based collaborative decision-making and portfolio prioritization. The client selected TransparentChoice and Catalyze in a competitive procurement process, replacing the existing supplier.

TransparentChoice operates a ‘Software as a Service’ model focusing on ease-of-use and mobility. Evaluators receive a personalised web link in an email, click to access the tool from their own browser device (laptop, pad or mobile phone), and are then led through a series of questions. They can generally do this in their own time and at their own pace, and can stop at any time and easily pick up again later. This ease of use was vital for our client as it ensured that the volunteers using the tool had a positive experience and could focus on their program assessments without the hassle of technology issues or needing to remember login details.

Catalyze reviewed the process as it had been conceived and planned, and made a number of recommendations based on many years of experience of similar portfolio prioritization situations. Some recommendations were for changes to be made in this years’ cycle, and other were for subsequent budget cycles where there is more scope for process change. The senior management at the client appreciated the feedback and the coaching, as it increased confidence with the volunteer evaluators and other process users. It was vital that the process was seen to have validity and integrity, as the outcomes would provide the basis for investment decisions including the potential to discontinue programs.

Catalyze set up the prioritization models in the TransparentChoice tool, trained the evaluators in brief conference calls, provided hotline support during the evaluation period and presented detailed analysis of the data. In all these activities we worked in close liaison with the client Project Manager, and also with TransparentChoice to give the client a single point of contact.

Enabling Effective Decisions

The process delivered a ranked list of programs, evaluated for their fit to the organisation’s strategic plan objectives. Members were involved in the evaluation, and their input and viewpoints have been brought directly into the budgeting process. The activity provided a focal point for positive and constructive strategic debate.

The opportunity now exists to use the prioritization and budgeting process as a spur to innovation in delivering additional member value and ensuring continued relevance for the association as the membership environment evolves.

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Catalyze is a strategy consultancy, helping clients to prioritise and make robust sustainable decisions. We believe the best results are delivered through effective decision-making that engages people and aligns organisations. We have an established track record of enabling our clients to achieve results, whether it’s improved shareholder value, a better planet or both.

Catalyze was founded in 2001 in conjunction with the London School of Economics and Political Science, applying techniques built on robust and validated decision theory. We support global clients from offices in the UK, USA, Australia and New Zealand.