The Systems Thinking Approach® to Strategic Management
Workshop Case

We are a new non-profit North American association created for IT trainers. We have our name "Association for IT Trainers" registered and have incorporated our association legal both the USA and Canada. Therefore, we have tax-exempt status.

This association promotes development of skills associated with developing, delivering and evaluating IT training. We believe that through membership in our association the status of IT trainers in the eyes of their employers is enhanced.

The idea for this new association grew out of a need by many businesses to have quality IT training for their employees. IT training is not a regulated field, so the quality of training varies greatly. We hope to raise the quality of training delivered by our members. There are no other associations in North America that do what we hope to achieve, and we have considered allowing other cities and areas to set up chapters under our association. However, there are concerns about growing too fast before we are ready. We have not heard of anyone else attempting to create a similar association.

We have a few dedicated and enthusiastic volunteers who are setting up the association – but never enough volunteers. Our volunteers have some experience creating strategic plans for their departments, but few for an entire organization. Since they come from different organizations there is no one way of planning that our volunteers have used. Volunteers seem to be satisfied with where we are going but many are frustrated that we haven't created a plan yet. We don't want to lose any volunteers at this early stage. We need to think about retaining volunteers, as well as members (when we get some).

We have many volunteers willing to work on the website, but no one who is comfortable with communication, marketing and working with volunteers. We have a website but little content. We have hired, Melissa, a communications contractor to help us create the content for our website and marketing. We have no full-time staff and aren't sure when and if we'll need any. There is confusion over who's in charge since all volunteers are equal. We have no formal ways of reaching out to potential members and their organizations. We've talked about social media, emails and a magazine/newsletter but no decisions have been made.

Presently volunteers are working in their offices or homes to support the association. One volunteer, Sarah, wants us to set up office space, some others don't want to pay for any fixed costs until we prove we can attract paying members and need a physical space.

We want to attract more volunteers as well as paying members. At this time other than training courses we aren't sure what potential members might want from our association. The

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corporate lawyers at two of our funding businesses are willing to help us with legal matters for the first two years.

Eight of the large businesses in our area have kicked in seed funding for a total of $6.5 million to help us start the organization. We are expected to be self-funding in 5 years with no more injections of funds from the eight initial funders. These organizations want to be updated on our progress throughout our first 5 years. The largest funder, by far, is Newton Technologies. We don't want to rely totally upon our funders and want to start bringing in income as soon as possible. Our biggest supporter in our funding companies is the Chief Information Officer of Newton Technologies, Angela Spears. Early in our history Angela reached out to her counterparts in other IT organizations to help raise our original seed funding. Angela remains a mentor and sounding board for our volunteers. We have received $2 million of the promised $6.5 million and are about 75% sure that the rest of the funding will come in over the next two years. If the rest of the funding doesn't come in as planned, we aren't certain we will be able to survive as an association.

We have talked to the eight supporting businesses and they believe that both members and their employers will benefit from being part of the association and therefore, are willing to pay for membership fees for their internal IT trainers. However, we don't know if membership in our association will cause the IT trainers to make more money or be given new opportunities.

We have many ideas on the kind of development that IT trainers need, but it there is a broad range of needs depending upon each individual. Some of the trainers have taken courses on their own, some are naturally gifted and some were put into training for various reasons including their technical knowledge, tenure, desire to teach and didn't know where else to put them.

Our geographic area has a growing economy and we predict the need for more IT training and trainers over the next few years. There are also quite a few universities and colleges in our geographic area that have computer technology. The area is considered an innovation hub.

We want this association to be open and welcoming to IT trainers across North America regardless of how long they have been training or their background. We hope to attract a diverse group of people (geography, education, ethnicity, gender identity, language, seniority, age, etc.) We want to add value for trainers who have been delivering workshops for years, as well as new trainers.

We have heard about a large conference occurring in Las Vegas in the next few months for the IT industry. We would like to participate somehow at the conference so people find out more about our association. We can attend the conference for $500 per person plus travel and accommodations. We are too late to present at any of the concurrent sessions, but there are

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some sponsorship opportunities for $1,000 - $5,500 but we think the possibility of having much to present as part of the sponsorship is low.

One volunteer, Max, has joined an association of associations to get information to help us run our new organization. The cost of belonging is reasonable and we paid for the membership from our seed capital. The association highly recommended we set up a board immediately, start collecting data on volunteers and potential members, and hire at least one person to manage our events and membership.

We have been discussing the idea of putting on training throughout the year as well as an annual conference. We expect corporate donations to help fund part of the conference and we see the conference as an opportunity to gain revenue and also attract new members. We will need more volunteers and perhaps staff or contractors to organize and run these events. One member thinks we should investigate grants for additional income.

We have one volunteer, Ben, with both IT and business background who is willing to stand as our first treasurer. Ben has developed a draft budget for the first year. We have a few volunteers with project management background. We have discovered that IT trainers have more of a need for networking that IT specialists, generally speaking. New IT trainers are usually younger than the average demographic for their organization. We also believe that most IT trainers are younger than the average demographic for our area. We are not sure how much disposable income younger members might have, so we are hoping their employers will cover part or all of their membership.

While there is no other association for IT trainers, many of our volunteers and potential members are busy with their families, other volunteering opportunities, upgrading their skills and hobbies. They often don't see the need for "soft skills" training like facilitation, gaining consensus, managing conflict, understanding adult learning theory, etc.

Technology is always changing and we see the opportunity to leverage our expertise in technology to attract members, gather information and deliver services. The internet is becoming pervasive and technology continues to make connectivity and devices more affordable and easier to use. We are concerned about recent cyber-attacks which seem to defy government and international bodies.

We have no governance to date. Max spoke to the Executive Director of The Canadian Professional Trainers Association. They gave us copies of their policies, organization chart and strategic plan. We appreciate them giving us this information as an excellent starting place for our own policies and procedures. Volunteer Brian wants to copy all of these documents, including their strategic plan and not waste time and effort creating our own policies and strategic plan. If we do planning, he believes the board can write it in two hours (maximum).

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Brian and Sarah do not agree on many issues. Brian doesn't think Sarah has good leadership abilities. Sarah thinks Ben is short-sighted.

Because our association is new we presently have no credibility with IT trainers and their employers. We wonder if we should set low or free memberships to get a few members however are concerned about the unintended consequences. We also discussed if the initial volunteers get free membership for the first year to thank them for their contributions. Someone mentioned connecting with universities and colleges for mentorship or free memberships. Some of our volunteers are recent grads and have connections to their former educational institutes that we could leverage.

We have created a board of directors for the new association made up of some of key volunteers including Sarah (Chair), Ben (Treasurer), Max, Brian and two other volunteers. The volunteers have been connecting about monthly and we believe that for now that's the right schedule for the board to be on for the next year. The board members are willing to attend meetings at least monthly, virtually or in person, to keep the association moving forward. They also meet with some other volunteers around important areas like membership, generating income and governance. So far people have been open to different opinions, but Brian seems to want to do everything on the fast and cheap so often disagrees with other board members about actions they should take. Melissa is handling marketing and communication on her own.

Our costs are reasonable so far, averaging about $3,000 per month. However, if we hire a part-time executive director or event planner that would increase our costs by $2,000-$3,000 per month. Memberships for similar associations vary from $250 to $750 per year. We have set up banking online so that invoices can be easily paid by Ben and we can accept etransfers for memberships.

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