Rationalizing Programs and Services: A Case Study

In order to assess and prioritize its program of work, the National Court Reporters Association (NCRA) undertook a systematic review of all products and services, which it called the ROSE Project: Resources, Opportunities and Services Evaluation.

The initial effort involved a comprehensive evaluation of current programs. Five years of data was collected on every product, service, and activity of the association.

This was followed by an analysis effort, organizing the data in a systematic way that would allow for informed judgments to be made as to: the strengths or weaknesses in each program; whether the current allocation of resources was adequate to meet stated intentions and/or justified by the return on investment delivered; current and prospective competition; where there were partnership opportunities; and/or outsourcing opportunities; how well each program aligned with members' needs and the association's strategic objectives; and where there were gaps in the inventory (i.e.; critical needs not being met).

It is important to stress that the data collection included not only financial performance, but also data on member value and utility. As such, there are two key metrics of program performance: How much they contribute toward achieving strategic plan goals (strategic return on investment), and profitability (financial return on investment, which generates the resources to support less profitable or unprofitable, mission-related programs).

As a result of the effort, a list of macro issues regarding future product and service mix was identified and a large number of changes to the existing inventory were made.

The project also established planning and budgeting principles that have been integrated into the association's governance, budgeting and management efforts on a going forward basis.

The importance of the project should be viewed not only for its direct impact on specific budgeting and planning decisions, but its utility as an educational activity for both staff and volunteer leadership.

This handout includes the following documents:

1. A background fact sheet for staff explaining the project when it was started.
2. The one page process diagram presented to the board to describe the project.
3. An abstract of the final report.
4. A new project vetting process established as a result of the study.

"The Race for Relevance: Change Is the Winning Formula"
Thursday, April 14, 2011
9:00-11:30am
ASAE Building Conference Center, Washington, DC 20004