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G4G TECHNICAL DELIVERABLE ASSOCIATION MANAGEMENT WORKSHOP

**ASSOCIATION MANAGEMENT WORKSHOP FOR GEORGIAN
BUSINESS ASSOCIATIONS
GOVERNING FOR GROWTH (G4G) IN GEORGIA**

30 April 2015

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G4G TECHNICAL DELIVERABLE ASSOCIATION MANAGEMENT WORKSHOP

ASSOCIATION MANAGEMENT WORKSHOP FOR
GEORGIAN BUSINESS ASSOCIATIONS

GOVERNING FOR GROWTH (G4G) IN GEORGIA
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Author(s):	Camelia Bulat, Senior Consultant, CIPE
Reviewed by:	Maya Eristavi, Advocacy and Capacity Building Component Lead Eka Leonidze, Organizational Development/CYPRESS Advisor Milo Stevanovice, Chief of Party Mike Martley, Communications Team Lead
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ABSTRACT

As part of a multi-step approach in building the capacity of business associations in Georgia to advocate for priority reforms, G4G has organized an association management workshop in Kakheti, on April 22 - 24, 2015. Camelia Bulat, G4G contractor, prepared and conducted the workshop.

Eleven representatives of Georgian business associations and chambers of commerce participated in the workshop in which they discussed membership, programs and services, and advocacy topics.

The workshop will be complimented by individualized capacity building activities.

ACRONYMS

Acronym	Definition/Description
AmCham	American Chamber of Commerce in Georgia
BEC	Business and Economic Center
CCFG	Chambre de Commerce et d'Industrie France-Georgie
GAWB	Georgian Association - Women in Business
GCCI	Georgian Chamber of Commerce and Industry
GFA	Georgian Farmers' Association
GTA	Georgian Tourism Association
GSMEA	Georgian Small and Medium Enterprise Association
GWBA	Georgian Women Business Association
GUBC	Georgian-Ukrainian Business Club
G4G	USAID Governing for Growth in Georgia
NGO	Non-governmental Organization
SWOT	Strengths, Weaknesses, Opportunities and Threats
USAID	United States Agency for International Development
YEA	Young Entrepreneurs Association

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EXECUTIVE SUMMARY

In order to achieve effective policy dialogue, Georgian business associations and chambers of commerce need to be equipped with the proper tools, knowledge, and know-how to support the interests and solutions of their constituencies.

As part of a multi-step approach in building the capacity of business associations in Georgia to advocate for priority reforms, G4G has organized an association management workshop in Kakheti, on April 22- 24, 2015. Camelia Bulat, G4G contractor, prepared and conducted the workshop. Eleven representatives of Georgian business associations and chambers of commerce joined the workshop in which they discussed membership, programs and service, and advocacy topics. The workshop will be complimented by individualized capacity building activities.

This workshop begins the program of developing the capacity of local business associations. G4G will continue this area of work for the duration of the project. This program provides practical tools to support organizations to become effective advocates on the reform issues under the project, such as enabling business environment, land reform, energy reform, water resource management, capital markets reform, etc.

APPENDICES

A. BACKGROUND

Georgia has many accomplishments in improving the business climate and advancing reforms. However, the transition continues, and public policy still requires improvement. It is also important to ensure legislation is realistic, effective, and the private sector is capable and ready to comply with the new policy. At the same time, the representatives of the business community need to participate actively in the policy making process. They must express their perspective in an effective manner and advocate for their solutions to be incorporated in the new legislation.

In order to achieve effective participation in policy dialogue, Georgian business associations and chambers of commerce need to be equipped with the proper tools, knowledge, and know-how to support the interests and solutions of the constituencies.

G4G's mission in this project is to focus on building the capacity of business associations to advocate effectively for policy reforms. It is a general understanding in the developmental organization field that strong associations are strong advocates. Therefore, developing the capacity and leveraging the influence of the local Georgian business associations is not the final end-state desired, but a means to achieve effectiveness as players and stakeholders in public-private dialogue.

To accomplish this goal, the Georgian business associations and chambers of commerce will need to identify and address their weaknesses, build a strong membership base, provide effective programs and services, and become knowledgeable advocates.

This workshop begins the program of developing the capacity of local business associations. G4G will continue this area of work for the duration of the project. This program provides practical tools to support organizations to become effective advocates on the reform issues under the project, such as enabling business environment, land reform, energy reform, water resource management, capital markets reform, etc.

B. METHODOLOGY

G4G and its Senior Consultant, Camelia Bulat, advances a holistic approach focused on creating the premises for development of business associations. Rather than approaching this assignment as a stand-alone activity, G4G developed a program that is dedicated to the specific needs of the attending associations by understanding who the business associations are, their identity, strengths and weaknesses.

Ms. Camelia Bulat, in her capacity as a Senior Consultant has implemented the following steps:

1. Developed a comprehensive application form for the associations and chambers of commerce that were interested in participating in the workshop (Appendix 1)

In consultation with Maya Eristavi, G4G Component 5 Lead, and G4G contractors, Ms. Bulat developed the application form that included many elements of a diagnostic assessment. The application form served the following purposes:

- Provide relevant information on the organization;
- Reveal the perspective of the chief executive or president on the association;
- Provide to the association leadership a list of areas of work concerning association management that they should be aware of. Rather than informing and communicating to the

associations the areas they should develop, G4G developed a diagnostic questionnaire to identify functional shortfalls to further address. G4G considers this approach more suitable than simply telling people what they should focus on.

Prior to the workshop, G4G received completed application forms from the following organizations:

- Business and Economic Centre (BEC)
- Georgian Women Business Association (GWBA)
- Georgian Farmers' Association (GFA)
- American Chamber of Commerce in Georgia (AmCham)
- Georgian Tourism Association (GTA)
- Georgian Chamber of Commerce and Industry (GCCCI)
- Georgian Small and Medium Enterprise Association (GSMEA)
- Chamber de Commerce France Georgia (CCFG)
- Georgian Association – Women in Business (GUBC)
- Young Entrepreneurs Association (YEA)

The analysis of these documents was very helpful for developing the content for the workshop.

2. Analyzed the associations' websites

Once G4G received the list of participants, Ms. Bulat thoroughly analyzed their websites, looking for elements that would help her to understand their level of professionalism and sophistication in advocacy, membership, programs and services.

For each of the above mentioned topics, Ms. Bulat selected elements from their websites that were used during the workshop presentations. This was especially well received by the audience. They understood that the consultant did not only want to share with them the main ideas about membership, advocacy, programs and services, but more importantly to raise awareness about who they are and what they do.

This approach built trust between the consultant and the associations' leadership.

3. Prepared the workshop agenda and the materials for the workshop

In consultation with Maya Eristavi and G4G contractors, Ms. Bulat prepared a three-day agenda for the capacity building workshop (Appendix 2).

The agenda focused on three topics: membership, advocacy, programs and services, for which Ms. Bulat developed the following power point presentations and selected appropriate exercises:

- | | |
|--|------------|
| - Presentation on Membership | Appendix 3 |
| - Presentation on Programs and Services | Appendix 4 |
| - Presentation on Advocacy Process | Appendix 5 |
| - Presentation on Public Policy Analysis | Appendix 6 |
| - Exercise for Programs and Services Session (Eisenhower method) | Appendix 7 |
| - Exercise for Programs and Services Session (Five-Way Test) | Appendix 8 |

In addition, Ms. Bulat developed materials for “take-home assignments” that would help the participants continue their work. During these assignments the participants were in contact Ms. Bulat by Skype or email, at their convenience, to discuss aspects related to their respective organizations. The idea of these assignments was not to test their knowledge, but to use it for the benefit of their organization. This is why the first assignment, which was mandatory for all participants, is to complete a SWOT analysis of their organizations. Based on their interest in membership, programs and services, or advocacy, they could choose one assignment and develop their associations in this regard.

Appendix 9 includes the assignments prepared for this particular workshop.

4. Conducted a three-day workshop with chief executives and senior staff

The workshop has been organized in Kakheti, April 22- 24, 2015, with participation from eleven associations and chambers of commerce in Georgia. The list of participants is presented in Appendix 10.

The workshop was very interactive, with emphasis on the practical application, allowing time for discussions and sharing information between the members of the group. The concept behind the three days of the workshop was that no association can be an effective advocate unless they are representative, credible, and powerful. In this regard, it has been discussed and emphasized during the workshop the collective integration of the mission of the organization, the members’ needs and expectations, as well as programs and services provided by the organization.

During the workshop, the participants explored their own organizations, shared details about their programs, and how they approach members. This exchange of information was very useful, especially for the young associations, who were able to gain insight from more experienced colleagues.

During the advocacy session, it was obvious that most organizations have common interests in influencing public policy, but they lack information on what others are doing. For example, Georgian Small and Medium Enterprise Association (GSMEA) has already started to advocate on changing a specific policy that currently affects small sized restaurants, cafeterias, or family-owned pastry shops. The representative of the Georgian Tourism Association (GTA), whose members also include restaurants and hotels, was very much interested in this initiative, and offered to help and work together address this issue.

At the end of the workshop, the participants received take-away assignments that are due by June 1, 2015. Ms. Bulat encouraged the participants to prepare these assignments because they are designed to help implement appropriate areas of work in their respective organizations. During this upcoming period, based on their requests, Ms. Bulat will advise them on how to grow and become stronger business entities.

5. Meetings with G4G representatives: During the trip Ms. Bulat met with the following people or groups of individuals: Milo Stevanovich, G4G Chief of Party, Nato Beruashvili, G4G Deputy Chief of Party, Nino Chokheli, Capacity Strengthening Component Lead, the Water Component team, as well as the Energy Component team. During the trip, both in Tbilisi and Kakheti, Ms. Bulat worked closely with Maya Eristavi, G4G Component 5 Lead and CIPE representative in the project.

C. FINDINGS

After concluding the workshop and based on the previous research activities, these are the main findings of Ms. Bulat’s current engagement in the G4G project:

- Georgian Business associations and chambers of commerce that Ms. Bulat worked with are among the most prominent and well represented for the local private sector. Some of these entities have a longer history than others, but in general, most of them are young organizations established in the last decade. The exceptions are the Georgian Chamber of Commerce and Industry (GCCCI) established in 1960 and the American Chamber of Commerce in Georgia (AmCham), created in 1998. This reality is a key factor that needs to be taken into consideration while providing technical assistance to these associations.
- In general, the business associations and the chambers of commerce have a small number of members, and do not plan to transform the associations into sizable organizations.
- Many of them provide programs and services that serve the private sector in general, and see themselves as representatives of the business community in general, rather than serving their constituency. In this respect they act more like NGO's, rather than directly representing their members' interests. This is probably happening because there is a need for this general representation, but with time, this strategy may be perceived as a disincentive by their members, who may need or expect more focused programs and services. In regards to effective advocacy with the government, the government has historically not utilized business association dialogue in a consistent and formal manner.
- Most of these organizations need to work more and refine their mission statements, making them shorter and clearer. Long and complicated statements are difficult to be remembered even by the leaders or staff of the organizations, and definitely are not a mental note for an outsider. The first step would be not to simply "clean" the wording of the mission statement, but clarify what they do and why they exist.
- Identity: some organizations need to work more on who they are and who they represent, to get a clearer picture of themselves. This is not an easy task to do, and the leadership will need proper guidance. A series of board meetings or meetings with mixed attendance (board and senior staff) with proper facilitation will assist in this regard.
- Members: it is obvious that all business associations and chambers believe that members are very important for their organizations. But they do not see them necessarily as "owners" of the organizations; they perceive them more as "clients" or "recipients" of their activities and services. In this regard, more work needs to be done, both at the level of the staff and leadership team, as well as among members, to build their association culture. A way to start this process is by working with their board.
- Free membership: while some of the organizations have membership fees, others do not have dues and offer free membership, or do not collect the dues on time. This financial philosophy derives mostly from the fact that they see themselves as representatives of larger sectors/audiences, rather than representing their members. Thus, they do not necessarily see the need to ask for dues and impose members to pay them. In this regard, more work needs to be done to revise this approach. A method is to underline the merits of a fee-based system, and help them develop such a system.
- Competition: most organizations cooperate in various aspects and are willing support each other's activities. They prefer not to see themselves in competition for members and resources. Nevertheless, competition exists. This is true especially for more sophisticated resources, such as access to official makers, members' active participation (engagement), time, and financial resources, such as grants and projects. Even though they do not "feel" this competition right now, in a few years they will get to that point.
- Programs and services: as mentioned above, due to the fact that in many cases associations play the role of general representation, the programs and services are not necessarily aligned with members' needs, but with the general interest of a much larger sector. This is not bad as

a strategy, but at the same time, they need to be aware of what they are doing, and make this an informed decision, rather than a strategy that emerged naturally.

- Focus: many organizations need to be more focused; right now many of them do too many things. As discussed during the workshop, many of them are “keepers”, meaning that they like their programs and services, and would not replace them, even if the demand is getting lower. In this regard, a more advanced marketing discussion with the leadership of the organizations may help them change perspective.
- Advocacy: there is definitely the need for advanced knowledge and know-how in advocacy. The focus should be more on the process, convincing, presenting arguments, solutions and not wish lists, in a professional manner. Developing these capacities internally, within the organizations is very important and needed.
- Financial stability: right now there are organizations that function almost 100% on grants and donor money. The organizations need to make an effort to diminish this percentage and develop alternative sources of revenues, dues included.
- Leadership and staff are committed to their organizations. There is a great potential in this regard, and with a proper approach many things can be accomplished to help them become strong advocates and represent the interest of their constituency.

D. RECOMMENDATIONS

The main recommendations for the future work in this program are the following:

- Continuing work with the business associations and chambers of commerce is recommended;
- Associations need support that is specific and adapted to who they are to help them grow and become influential organizations, successful advocates in supporting their members' interests;
- A series of workshops dedicated to specific topics in which there is more time to discuss in depth their specific situation will help associations in this process. Work in areas such as membership, programs and services, advocacy, even if they were discussed during this workshop, are recommended to continue. They need assistance and on-going support from people who have experience and who can guide them on a regular basis, until they know how to do it themselves; The assistance needs to be constant, so that they feel there is tangible support, and they can get help and advice on how to shape the future of the organizations.

E. ADDITIONAL INFORMATION

List of materials and deliverables produced as part of this assignment:

Appendix 1 – Application Form for Business Associations and Chambers of Commerce

Appendix 2 – Capacity Building Workshop Agenda

Appendix 3 - Presentation on Membership

Appendix 4 - Presentation on Programs and Services

Appendix 5 - Presentation on Advocacy Process

Appendix 6 - Presentation on Public Policy Analysis

Appendix 7 - Exercise for Programs and Services Session (Eisenhower Method)

Appendix 8 - Exercise for Programs and Services Session (Five-Way Test)

Appendix 9 – Take-home Assignments

Appendix 10 – List of Participants in the Workshop

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ASSOCIATION MANAGEMENT WORKSHOP FOR GEORGIAN BUSINESS ASSOCIATIONS
GOVERNING FOR GROWTH (G4G) IN GEORGIA

List of Appendixes

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BUSINESS ASSOCIATION MANAGEMENT TRAINING APPLICATION FORM

Introduction

As part of the USAID-funded **Governing for Growth (G4G)** project in Georgia, the Center for International Private Enterprise (CIPE) (www.cipe.org) is launching in spring 2015 a specialized training program for Georgian business organizations, such as business associations, professional and industry-based associations, and chambers of commerce, etc. This program will focus on strengthening the skills of organizations to better represent interests of business members and become active advocates for reforms that improve the business climate in Georgia.

This training program will consist of a series of training workshops and a mentorship program based on international best practices and the needs of the Georgian business community.

Instructions

To be more effective, CIPE will customize this training programs based on the needs of your organization. Please **fill in all sections in this Application Form with detailed information** about your organization. *Feel free to use as much space as needed to complete the Application.* This form provides CIPE with an overview of your association, its ability to serve members' needs, and its experience with public policy advocacy.

Once we receive your completed Application Form, we will contact you to schedule a short meeting to clarify the information provided in the Application.

Deadline: Please send back the completed Application Form by **17 April, 2015** to eleonidze@g4g.ge

1. BASIC INFORMATION ABOUT THE ORGANIZATION

- 1.1 Full name of the organization.
- 1.2 Status of the organization.
- 1.3 Address.
- 1.4 Phone.
- 1.5 Email.
- 1.6 Web Page.
- 1.7 Facebook Page.
- 1.8 Name and contact information for the President of the Board.
- 1.9 Name and contact information for the Executive Manager / Secretary General.
- 1.10 Year the organization was established.
- 1.11 Please, list the key activities of the organization.
- 1.12 Whose interests does the organization represent?

2. STRATEGY

- 2.1 Please formulate the mission of your organization.
- 2.2 Please formulate the organization's main purpose, goals and objectives.

Appendix 1

3. GOVERNANCE & MANAGEMENT

- 3.1 Please, tell us how your organization is governed.
- 3.2 How many board members does the organization have?
- 3.3 How often does the board meet?
- 3.4 Please describe the roles and responsibilities of the Board members.
- 3.5 How many terms can a board member serve on the board?
- 3.6 Has there been a change in board leadership?
- 3.7 How many staff members are in the organization?
- 3.8 What positions do staff members have?
- 3.9 Who does the majority of the work in the organization: the board or the staff?

4. MEMBERSHIP

- 4.1 How many members does your organization have?
- 4.2 What type of members do you have (please indicate percentage)?
 - Individuals members
 - Corporate members.
- 4.3 What is the profile of your members?
- 4.4 Does your organization have different categories of membership?
- 4.5 If yes on 4.4, indicate the categories, and number of members in each category.
- 4.6 What are annual membership dues in Lari or USD or EUR (by category, if you have categories)?
- 4.7 What percent of members pay dues regularly?
- 4.8 For the last two years, the number of members in your organization:
 - Increased
 - Significantly Increased
 - Reduced
 - Significantly Reduced

5. PROGRAMS AND SERVICES

- 5.1 What are the main services the organization offers to its members?
- 5.2 Do all your programs and services stay within the mission? If not, what is your approach to those services or programs?
- 5.3 Do you offer additional services for fees to members (and non-members)?

6. ADVOCACY

- 6.1 What are the main challenges and problems faced by your members today?

6.2 Does your organization engage in advocacy campaigns or other policy advocacy activities?

6.3 If yes on 6.2, please, provide a short description of the main advocacy activities and/or campaigns that you have conducted over the last three years.

6.4 What tools do you use to communicate advocacy ideas with the *Government*?

6.5 What tools do you use to communicate advocacy ideas with *Media*?

6.6 What tools do you use to communicate advocacy ideas with the *general public*?

6.7 What tools do you use to communicate advocacy ideas with your *Members*?

7. FINANCES

7.1 Does the organization's revenue cover your expenses?

7.2 What percentage of your budget comes from:

- membership dues
- services
- donors grants or projects
- Government grants or projects?

8. PERSON / PERSONS NOMINATED TO PARTICIPATE IN THE TRAINING PROGRAM:

8.1 First Name _____

8.2 Last Name _____

8.3 Position within the Organization _____

8.4 Address _____

8.5 Phone Number (____) _____

8.6 Email _____

8.7 Indicate the education level, such as degrees (diplomas), University, and the Graduation Date.

8.8 Skills and Qualifications: Licenses, Skills, Prior Training programs, and Awards

I certify that information contained in this application is true and complete. I authorize the verification of any or all information listed above.

Signature _____

Title _____

Date _____



BUSINESS ASSOCIATION MANAGEMENT TRAINING

April 22 – 24, 2015

AGENDA

Wednesday, April 22, 2015

- 12.00 **Welcome remarks and participants introduction**
- 12.30 **Governing for Growth Project Presentation**
Maya Eristavi, Advocacy and Capacity Building Component Lead, G4G
- 13.00 Lunch
- 14.00 **Membership: the profile of your member**
Camelia Bulat, CIPE Senior Consultant
- 15.00 Break
- 15.30 **Membership: benefits and value propositions**
Camelia Bulat, CIPE Senior Consultant
- 16.30 **Adjournment**
- 19:00 **Dinner**

Thursday, April 23, 2015

- 9.30 **Membership: attracting and keeping members**
Camelia Bulat, CIPE Senior Consultant
- 10.30 Break
- 11.00 **Programs and services**
Camelia Bulat, CIPE Senior Consultant
- 13.00 Lunch
- 14.00 **Programs and services: tools**
Camelia Bulat, CIPE Senior Consultant
- 15.00 Break
- 15.30 **Advocacy experience in Georgia**
Maya Eristavi, Advocacy and Capacity Building Component Lead, G4G
- 16.30 **Adjournment**
- 19:00 **Dinner**

Friday, April 24, 2015

- 9.30 **Public policy - 10 question analysis**
Camelia Bulat, CIPE Senior Consultant
 - 10.30 Break
 - 11.00 **Public policy - 10 question analysis**
Associations' presentations
 - 11.30 **Steps in organizing a public policy advocacy campaign**
Camelia Bulat, CIPE Senior Consultant
 - 13.00 Lunch
 - 14.00 **Steps in organizing a public policy advocacy campaign**
Associations' presentations
 - 15.00 **Assignments and closing remarks**
- Appendix 2

15.30 **Adjournment** 16:00 Departure from Kvareli





Camelia Bulat, CIPE Senior Consultant
Georgia, April 22 - 24, 2015

MEMBERSHIP

United Entrepreneurs for Better Business Environment

Our Business is Your Success

**Successful Investor
Powerful Country**

We create opportunities

ჩვენ ვქმნით შესაძლებლობებს

MISSION STATEMENTS

“Advocate Common Interests of the Business Community, Aiming to Improve Business Environment and Increase Competitiveness and Productivity of Georgia's Private Sector.”

“XXXXX is the largest and most vocal global Business Association, it includes over 350 corporate and youth members and 27 business associations.

“Our mission is to support, lobby and defend the interests of our members not only in society, but in government authorities, at local and international level”

5

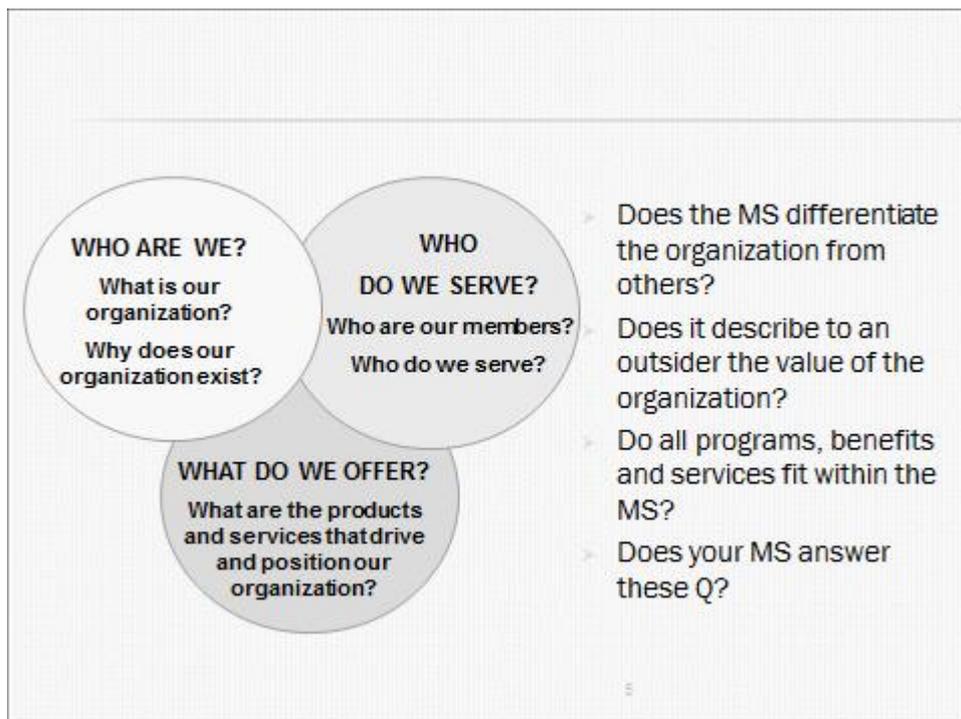
MISSION STATEMENTS

“to support through strengthening of women's entrepreneurship and access to markets, advancing economic empowerment and rights, roles for wider gender mainstreaming in all segments of social life”;

“The XXX in Georgia is an association aiming to promote the development of commercial relations between Georgia, the YYY, and the international community in Georgia”.

“to develop entrepreneurial ecosystem and support startup entrepreneurs in Georgia”

6



MEMBERSHIP:

Who are your members?

Numbers and sector of activity;

Membership dynamic;

Retention rate / new members that joined in 2014;

Please describe your members using three characteristics of your choice;

Are you satisfied with your membership? Why?

GRADING YOUR MEMBERS:

- Type A Member: **INVOLVED**
 - Frequent participant;
 - Actively involved in the organization's activities;
 - Financially support the organization
 - Candidates for leadership
- Type B Member: **PARTICIPANT**
 - Solid average participation
 - Loyal
 - Minimal financial supporter
 - Limited availability to added responsibilities
- Type C Member: *How would you describe this type?*

ASSOCIATION WEBSITE:

+ What information do you have on the website about your members?

Members

- Direct Members are 500
- All the others are the members of our member associations

OUR MEMBERS



MEMBERS BENEFITS QUIZ:

1. X membership benefits are: Advocacy, Effective communication, Better qualifications, Consulting services, Access to information

2. Y

1. Partnerships

Expand your network through our diverse range of business and social events.

2. Exchange

Share your experience and best practices with other.

3. Benefit from exclusive Privileges

Thanks to your membership card, get exclusive advantages and special discounts locally and internationally.

4. Growth

Develop your business using our trade services.

5. Insight

Stay informed via our industry knowledge and online tools.

9

× Z Members' Benefits: "Networking, Staying informed, Investor.ge, Market your business, Inform public policy, Connect with investors"

× T



10

BENEFITS AND VALUE PROPOSITIONS

Features & Benefits: Features are the “what” and benefits are the outcomes or “WIIFM” (What’s in it for Me?)

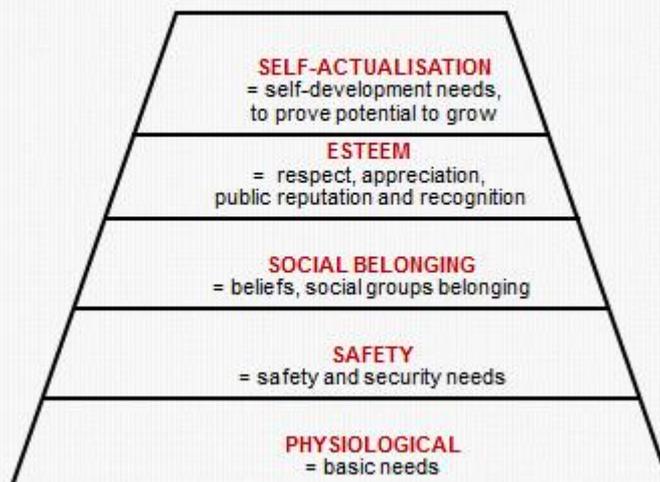
Unique Value Propositions— Promote the values or benefits all members receive from the organization stated in language understood by all constituents.

Leverage effective value-propositions focused on benefits, not features.

11

Needs Pyramid - Our Members

*(Abraham Maslow, *Motivation and Personality*; NY, Harper & Row, 1954)



12

MEMBERSHIP CATEGORIES

About Us	MISSION STATEMENT
Existing Members	View All (A-Z)
Member News	Patron Members
Join Us	Corporate A
Committees	Corporate B
Investor.ge	Non-Profit
Resources	Individual
Contact Details	Visiting



13

JOINING YOUR ORGANIZATION

What is the process?

Where do I find the information?

Testimonials:

“Active, prominent and strong leadership.”

“All members have equal say and equal voting rights.”

What differentiates ICC Georgia from others is that ICC Georgia works closely with the government and brings the issues which are of particular interest of businesses, without being afraid of criticism from the government side.”

14

☐ DONATION

☐ BECOME A MEMBER

☐ DOCUMENTS

☐ PHOTO GALLERY

☐ LINKS

☐ PARTNERS

☐ VIDEO GALLERY

☐ CONTACT

Register as :

[Startup](#)

[Mentor](#)

[Investor](#)

Register as [Member](#)

Why to Join?

How to Join?

Benefits

Members

15

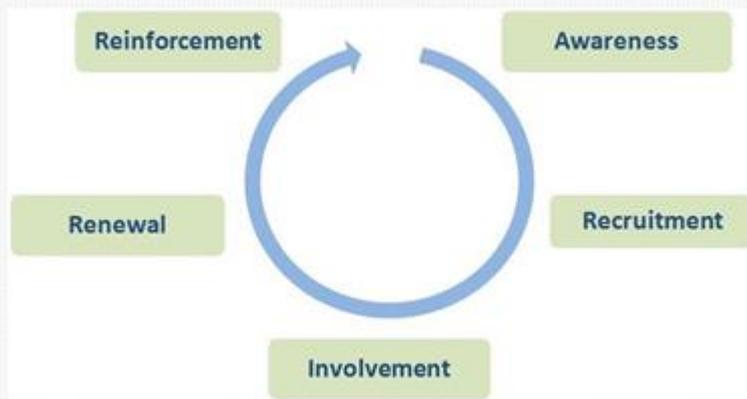
MEMBERSHIP GROWTH

Understanding Members' Expectations + Exhibiting a Willingness to Exceed Them



16

MEMBERSHIP LIFE CYCLE



17

WRAP UP EXERCISE:

Based on the previous discussions, please prepare a 5 minute presentation to:

- Attract a new member;
- Engage an existing member that lost the interest in the organization;
- Regain a lost member.

18

CHALLENGES IN MEMBERSHIP?





PROGRAMS AND SERVICES

CAMELIA BULAT, CIPE SENIOR CONSULTANT

2

- Please make a list with your top 5 programs and services;
- Choose your “Star” and describe it in terms of features, benefits, and value to members.
- Are your programs and services aligned with your mission and membership?



The “Market”

Demand-side Analysis

- > Members, non-members
- > Administration (central or local)
- > Other NGOs, media

Supply-side Analysis

- > Similar organizations already offering similar services (your competitors)
- > Organizations that could offer similar services (potential competitors)

Is association marketing different from corporate?

Competition:



- How much competition is there on the market?
- As an organization you compete for....?
- How do you deal with the competition among your members?
- What is your competitive advantage?
- How do you work together with your competitors?

What Do We “Sell”?

Programs & services:

- Dedicated to members / non-members
- Cash provider?
- Are you competing with your members?

Advocacy

- Not mandatory
- Works better for mature and consolidated organizations
- Doesn't bring “direct cash”

Projects - “There is no such a thing as a free lunch” – *Milton Friedman*

Auditing Programs and Services

- How often do you assess your programs and services and how do you perform the evaluation?
- Based on what criteria do you decide to stop or to continue them?
- If some of the programs/services are not working like you want them to, is it usually a matter of them not being needed or effective anymore, or that they are not marketed the right way?



Auditing tools: Eisenhower Method

- > All programs and services are evaluated using cross cutting criteria:
 - i) **high importance/low importance**; ii) **urgent/not urgent**
- > Q1. programs and services on high importance and urgent are **included in the portfolio and are done by BA staff or strictly under its control**;
- > Q2: programs and services on high importance but less urgent **get a deadline** and are supplied by BAs;
- > Q3: programs and services low importance and not urgent **are dropped** from the portfolio;
- > Q4: programs and services less important, but urgent **are outsourced** to an external provider.

Auditing tools: Five-Way Test

- Is the program, service compatible with the mission?
(Is it appropriate?)
- Is the program, service important to membership?
(Is it relevant?)
- Does the organization have the financial and staff resources to successfully initiate/continue the program, service?
(Is it cost-effective?)
- Is the program, service duplicative with those offered by other organizations within the community?
(Does someone else do it better?)
- Can the program/service be sustained over time?
(Does it have staying power?)

Marketing Challenges

9

- Attracting and retaining members from competing associations
- Limited resources and staff and must compete for members' attention and resources
- Leadership changes can leave gaps in the association
- Keeping up with technology changes
- Staff turnover

Marketing Challenges

10

- Dealing with member dissatisfaction
- Managing member expectations during financial crisis
- Adapting to changing member needs
- Coping during adverse and difficult economic times



Some final thoughts

- Programs & services must be:
 - **appropriate**
 - **relevant**
 - **effective**
 - **sustainable**
- Lack of competition leads to weak services or even weak organizations,
- It's always a matter of perspective: A program is an expense or a source of revenue?
- At the end of the day an organization must fulfill its **mission**.



ADVOCACY Process

Camelia Bulat
CIPE Senior Consultant
Georgia, April 22 – 24, 2015



1

What is Advocacy?

- Changing policies or programs of any institution
- Putting issues on the public agenda
- Providing solutions for issues of public interest
- Building public support for issues and solutions
- Making the case for/against a public position or policy



2

Advocacy versus Lobbying



- The act of **influencing** or **supporting**:
- **Advocacy** focuses on the PUBLIC Interest of an issue that impacts a large group
- Advocates
- Advocacy is not designed to:
 - Obtain special treatment for a business
 - Solve problems concerning members daily activities, unless there is a large obstacle;
 - Settle disputes among members
- **Lobbying** focuses on narrower issues of interest to a specific group
- Lobbyist
- *"Lobbying can improve government decisions by providing valuable insights and data, but it can also lead to unfair advantages for vocal vested interests if the process is opaque and standards are lax" – OECD Report, 2009*



3

The ADVOCACY Process: A Step - By - Step Approach



- Develop the issue (your position, what is that you want)
- Educate & mobilize your network
- Analyze stakeholders
- Build like-minded coalitions
- Target decision makers
- Message development
- Select proper communication tools
- Coordination of grassroots advocacy campaigns (build public support) & Direct advocacy
- Track debate on policy (the issue)
- Follow-up

4

Organizations that engage in ADVOCACY need:



- **CREDIBILITY**
- **REPRESENTATIVITY**
- **INFLUENCE**
- **POWER**



5

Preparatory Activities



- Remember: Advocacy is about public interest!
- Get organized: **create a task-force (Advocacy initiative group)** that will represent the large group of stakeholders who care about the issue.
- Selecting the task-force
 - Representative
 - Credible
 - Dedicated people
 - Knowledgeable with respect to issues
 - Good communication skills
 - Teamwork

6

Advocacy campaign process



The members of the Advocacy Initiative Group need to:

- Be familiar with key issues;
- Have the willingness to devote time and energy;
- Prove teambuilding and leadership skills;
- Prove a good understanding of the policymaking framework;
- Have an “open door” to relevant policymakers;
- Have a budget and staff;
- Meet regularly (conduct the advocacy process - decisions, advocacy strategy, document approvals; contact association members and policy makers; monitor the process)

7

Selecting & Developing the Issue



- **Problem Identification:**
 - How do you identify and select the issue?
 - Based on: members' interest, timing, potential for success, potential allies
- **Issues:**
 - Relevant to a large number of members
 - Concern particular public policies, laws, regulations
 - Clear cut;
 - Are not opposed by powerful group of legislators or the general public
- **Prioritizing:**
 - Have you selected several problems? How do you prioritize them?

8

Developing Solutions



- Developing proposals or solutions (thorough research, use experts, lawyers)
- Selection of optimal solutions
- Remember to look at issues from the other parties' viewpoint, as well
- Policy briefs, Policy papers:
 - Be brief
 - Be factual
 - Be truthful
 - Be documented
 - Don't mention unrelated issues.

9

Educate and Mobilize Your Network (Grassroots Advocacy)



- Educate members regarding:
 - Issues / The context / The solutions / The advocacy process
- Mobilize your network:
 - Use the task-force members
 - Gain broad involvement to build representation and participation



10

Analyze Stakeholders



- The group of people affected positively or negatively by the solution
- Players who have a role in influencing the decisions
- Have a specific interest and a clear position regarding the PP
- Have resources they are willing to share: **Information, Economic strength, Credibility / Status; Authority – legitimacy, Coercion**

11

Stakeholder Matrix



Group	Interest in the issue	Resources	Capacity to mobilize resources	Position towards the issue
Name, contact info	Level of interest (high, low). Identify the interest, if possible.	Summary of resources	Estimate how and how many resources can be mobilized.	Position: ally, neutral, opposed, important or not.

Building Coalitions



- A refined way of dialogue
- A common/united voice
- Larger representation & Greater visibility
- More resources (information, people, finance, etc.)

- Leadership & Commitment
- Mission / Vision / Strategy
 - Why have a coalition?
 - What is our goal? What do we want to accomplish?
 - Open discussions between future coalition members
 - Gain consensus

13

Working as a Coalition



- Two major aspects:
 - Work plan
 - Assign responsibilities
- How do you work? When do you meet? How do you communicate?
- The **work** is done by Coalition members (building the business agenda, advocacy campaigns, etc)
- The most valuable resource: **TIME**
- The most important asset: **COMMITMENT**

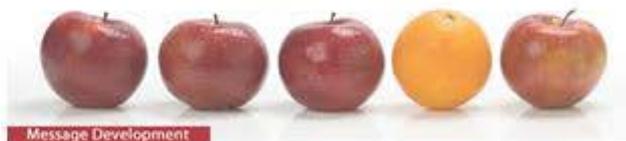
14

Message Development



- Create a set of messages
 - Specific for each target- group: supporters, neutrals, decision makers, mass media, potential reaction to opposition
 - Before making them public, verify the message with your friends to see if they understand it.

Stand Out.



15

Developing an advocacy strategy



- Who do we target? (local, national)
- What do we want from them?
- When do we act? Where?
- How will we present our demands?
- Who will be involved?
- How many leaders? What are their roles?
- What messages do they present? When?
- How do we control the system?
- Resources: Who will support what? Who will pay for what? Do we have enough resources? Do we have sponsors?

16

Developing a detailed action plan



- Activities;
- Responsibilities;
- Deadlines;
- Costs;
- Resources (financial, time, and human resources).



17

Communication in Advocacy



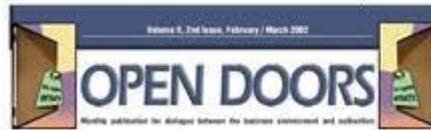
- Includes a wide range of communication means aimed at building public relations
- Internal Communication:
 - Develop efficient relations between various allies and stakeholders
 - Encourage common understanding of the issues, participation, cooperation and teamwork
 - Build one strong voice

18

External Communication



- Develop public relations with various stakeholders, including public officials
- Communicate your message to the media and decision-makers
 - Verbal, Written (issue briefs), Internet Communication
- Be creative and innovative with media relations



Advocacy Days are coming!

"Advocacy Days is the next step in a series of major initiatives of the Open Doors Campaign," according to Mark De Groot, Chief of Staff to the Governor for International Trade Complex (ITC), a 1998 founded program based in Rochester. Interest among these initiatives has been significant. The National Advocacy Day, held the second of the last year, has already generated a multitude of new stories about the sector for business involvement in advocacy and the campaign goals. The hour's publicity identification aimed to introduce the legislative proposals of these business coalitions to members of the media, the Government, and Parliament. Critical issues within the tourism and information technology, and manufacturing sectors were at forefront.



19

Follow-up and Evaluation



At the end of an advocacy campaign, the task-force should:

- Evaluate the number of recommendations implemented, their importance
- Evaluate each issue, and reanalyze its listing on the group agenda
- Discuss lessons learned
- Communicate:
 - Recognition messages (give credit to all allies and stakeholders);
 - Respectful messages to your opponents;
 - Communicate the results of your efforts to your members.

20



CRITICAL ELEMENTS OF PUBLIC POLICY

CAMELIA BULAT, CIPE SENIOR CONSULTANT

1

Public policy

- ✓ **Laws, rules and regulations of local or central institutions, decrees, norms;**
- ✓ **Public policy is elaborated based on a social or economic need.**
- ✓ **Benefits > costs.**
- ✓ **Ex. Romania: any proposal for a new public policy should have 3 solutions and a cost-benefits analysis (or impact analysis, feasibility study, risk analysis).**

▶ 2

Characteristics of the PP: 10 Questions

1. **What will the PP do?**

- ▶ What exactly do we expect to solve with the new PP? Which are the goals of the PP?

2. **What is the impact of the new PP? What do we expect to reach or facilitate?**

- ▶ How will things be changed?
- ▶ Will the new policy produce major or minor changes in the actual situation? Will it have a significant impact?

▶ 3

Characteristics of the PP: 10 Questions

3. **Who generates the change? Why has it been initiated?**

- ▶ The need for change comes from external or internal sources?
- ▶ Is the change mandatory? Why?

4. **Who initiates the PP?**

- ▶ The politicians? The NGO's? Trade unions?

5. **What are the benefits and who is directly impacted?**

- ▶ Narrow or broad impact? Who gets the benefits? Few people / sectors or broad impact?
- ▶ What exactly are the benefits? Are they visible / tangible? Intangible/ less visible?

▶ 4

Characteristics of the PP: 10 Questions

6. What are the costs of the PP and who pays the bill?

- ▶ Who are the winners? Who loses?
- ▶ Are there any tangible costs? What has to change in order to implement the PP?

7. What is the level of complexity of the PP?

- ▶ Who are the stakeholders involved in implementing the PP?
- ▶ Does the PP require overcoming technical / organization difficulties?
- ▶ Will it be an administrative nightmare?



▶ 5

Characteristics of the PP: 10 Questions

8. How long does it take to implement the PP?

- ▶ Short term? Medium or long term?
- ▶ What exactly does it mean? Months? Years?

9. What institutions are involved in implementation?

- ▶ Public, private, NGO's, mixed?
- ▶ What is the implementation capacity of these institutions?

10. What corrections are needed to implement the PP and how complex is the implementation methodology?

- ▶ How many entities are involved in implementing the PP?
- ▶ How difficult will it be to implement the PP?

▶ 6

EXERCISE

Please analyze a Public Policy Proposal using the 10 Questions survey.



▶ 7

1. What will the PP do?
2. What is the impact of the new PP? What do we expect to reach or facilitate?
3. Who generates the change? Why has it been initiated?
4. Who initiates the PP?
5. What are the benefits and who is directly impacted?
6. What are the costs of the PP and who pays for them?
7. What is the level of complexity of the PP?
8. How long does it take to implement the PP?
9. What institutions are involved in implementation?
10. What corrections are needed to implement the PP and how complex is the implementation methodology?



EXERCISE

AUDITING TOOL: EISENHOWER MODEL

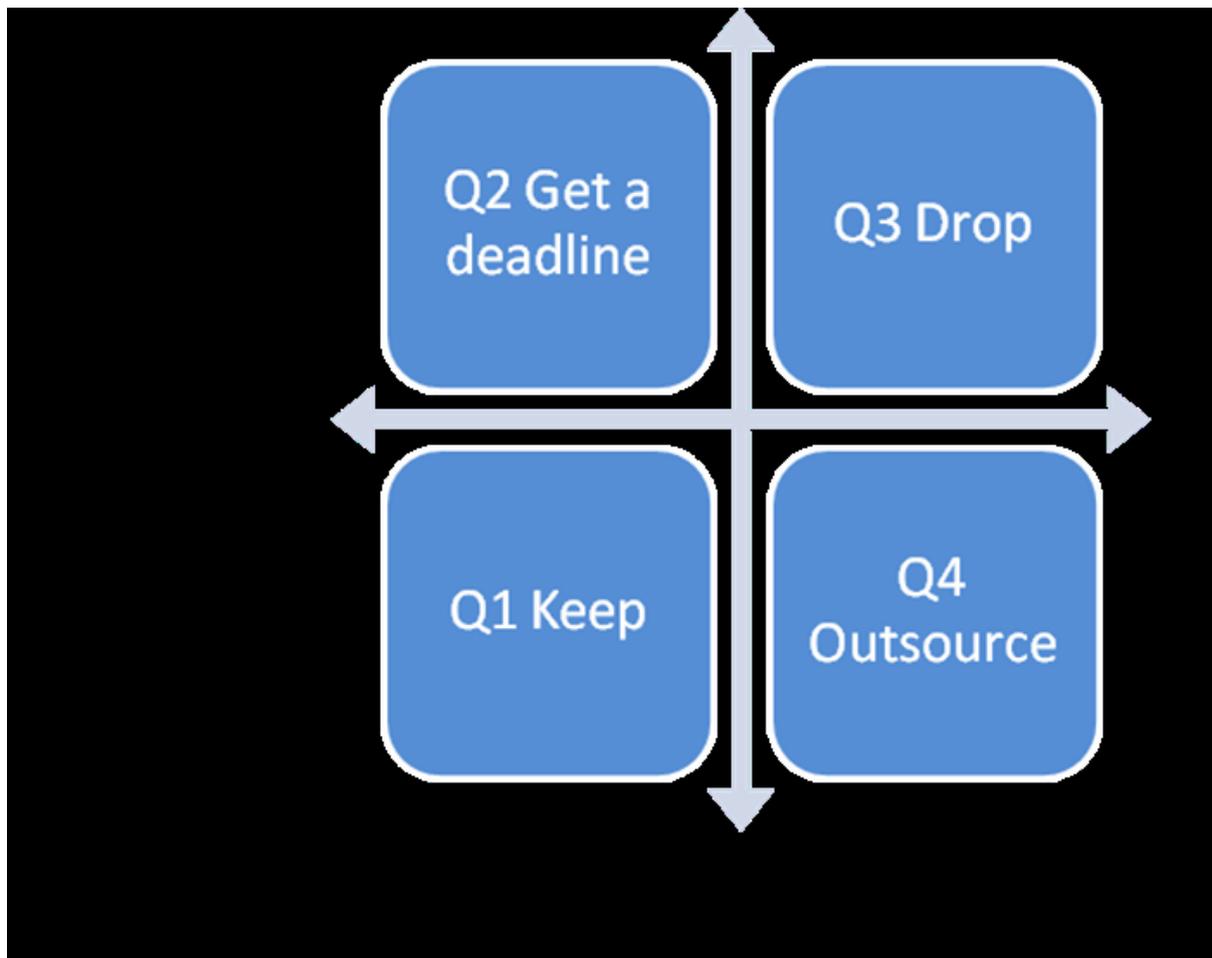
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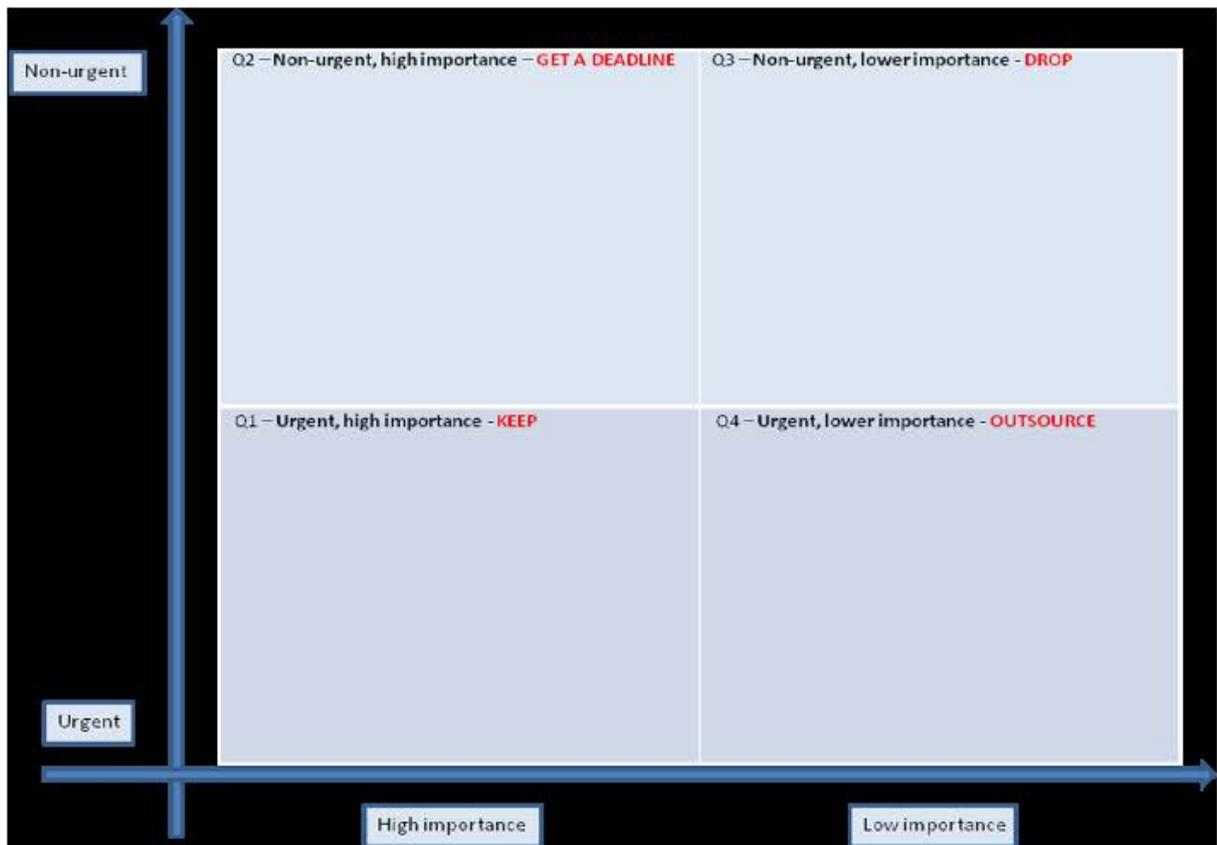
Q1: programs and services on high importance and urgent are **included in the portfolio and are done by BA staff or strictly under its control**;

Q2: programs and services on high importance but less urgent **get a deadline** and are supplied by BAs;

Q3: programs and services low importance and not urgent **are dropped** from the portfolio;

Q4: programs and services less important, but urgent **are outsourced** to an external provider.







EXERCISE

The Five Way Test

This test can be used to audit the suitability, relevance and effectiveness of programs and services.

- 1. Is the program, service, publication or event compatible with the mission of the organization? (Is it appropriate?)**
- 2. Is the program, service, publication or event important to the membership of the organization? (Is it relevant?)**
- 3. Does the organization have the financial and staff resources to successfully initiate/continue the program, service, publication or event? (Is it cost-effective?)**
- 4. Is the program, service, publication or event duplicative with those offered by other organizations within the community? (Does someone else do it better?)**
- 5. Can the program, service, publication or event be sustained over time? (Does it have staying power?)**

When auditing a program or service question 1 should be answered with yes or no.
The rest of the questions should be rated from 0 to 5.

How to interpret the results?

- Question 1: NO - The organization should not consider the service.
- Score of 0 -7: Organization should not move forward with implementation plan or should consider dropping it.
- Score of 8-12: Organization should do further analysis to ensure the success of the venture.
- Score of 13-20: Organization should proceed with implementation.



**BUSINESS ASSOCIATION MANAGEMENT TRAINING
ASSIGNMENTS**

GENERAL INSTRUCTIONS

The Participants in the “Business Association Management Training” are kindly invited to use the knowledge and skills gained during the workshop in order to analyze and improve the functions and capacities of their own organizations.

The scope of this activity is not to test the knowledge and understanding of the topic, but to assist you in analyzing and improving the performance and activities of your own organizations. Rather than focusing on generalities, we strongly encourage you to get into the depth of your organization and come up with analysis, ideas, and plans that will be the basis for further advancement of the organization.

Please submit your assignments no later than June 1, 2015 at e-mail cbulat@regionalcenter.ro and cstanila@regionalcenter.ro. Please copy Maya Eristavi: meristavi@g4g.ge

Each participant will receive feed-back by e-mail. At your convenience, we can also schedule skype conversations.

ASSIGNMENTS

Assignment 1 – SWOT Analysis

Assignment 1 is designed to be completed by **all program participants** and consists of a SWOT analysis of your organization. The analysis will help you look at your organization with a fresh eye, screening the external and internal environment to identify areas in which you excel as well, as areas that need to be strengthened to take advantage of the opportunities and avoid the threats.

Assignment 1: Please prepare a SWOT Analysis of your organization.

.....

Assignment 2 – Membership, Programs and Services, and Advocacy

Assignment 2 focuses on the topics discussed at the workshop: Membership, Programs and Services, and Advocacy. Based on the results of your SWOT analysis, you are kindly invited to choose your preferred topic and **prepare one assignment out of three options (Option I, Option II, or Option III)** that we propose.

Option I:

ASSIGNMENTS ON MEMBERSHIP - M

This assignment is meant for the participants who have indicated **MEMBERSHIP DEVELOPMENT** as one of their preferred topics. **Please choose at your convenience one of the following assignments and prepare a short report within 1,500 – 2,000 words (approx. 3 - 4 pages):**

- **Assignment M1:** Please assess your success in membership recruitment and retention. Which are the main elements you include in the assessment and how do you assess success or failure?
- **Assignment M2:** Please prepare a Membership Plan for your organization, with emphasis on retaining current members and attracting new ones.
- **Assignment M3:** Please provide a comprehensive description of each of the three components of membership (recruitment, retention and non-dues income) and give one example for each of them from your organization. Please explain which one is a priority for your organization at this moment, and why.

Option II:

ASSIGNMENTS ON PROGRAMS AND SERVICES - PS

This assignment is meant for the participants who have indicated **PROGRAMS AND SERVICES** as one of their preferred topics. **Please choose at your convenience one of the following assignments and prepare a short report within 1,500 – 2,000 words (approx. 3 - 4 pages):**

- **Assignment PS1:** Please choose one of your best programs or services and analyze your competition. Please identify in parallel the strengths and weaknesses of your program or service and present your competitive advantage.
- **Assignment PS2:** Using the "Five Way Test" please analyze two programs or services that your organization is offering to members. Explain why you scored in a certain way for each of the five questions of the Test.
- **Assignment PS3:** Please identify a program or service that does not exist in the portfolio of your organization and may be a good fit. Please present it in details, describing the features and benefits, and argument why it would be a good fit for your organization. Don't forget to include in your analysis the resources needed to implement such a program or service.

Option III:

ASSIGNMENTS ON ADVOCACY - A

This assignment is meant for the participants who have indicated **ADVOCACY** as one of their preferred topics. **Please choose at your convenience one of the following assignments and prepare a short report within 1,500 – 2,000 words (approx. 3 - 4 pages).** Please stay within 1,500 – 2,000 words:

- **Assignment A1:** Please explain the steps of the advocacy process. What are the conditions for an organization to be effective in the advocacy process? Provide examples from your organization's own experience.
- **Assignment A2:** Please select a public policy issue of high interest for your members and develop an outline of advocacy campaign to change the current legislation.
- **Assignment A3:** Please select a public policy issue of high interest for your members and analyze it using the ten questions approach.



List of Participants for the Association Management Workshop

- 1. Georgian Small and Medium Enterprise Association (GSMEA)**
Mikheil Chelidzde, Chairman
- 2. Chamber de Commerce France Georgia (CCFG)**
Ketevan Kenkishvili, Deputy of the Executive Manager
- 3. Georgian Women Business Association (GWBA)**
Nina Kochiashvili, President
- 4. Georgian Chamber of Commerce and Industry (GCCCI)**
Natia Meparishvili, Head of PR and Marketing Department
- 5. American Chamber of Commerce in Georgia (AmCham)**
Irakli Gelovani, Legal Analyst and Committee Coordinator
- 6. Georgian Farmers Association (GFA)**
Irusha Sepherteladze, Information Manager
- 7. Georgian Tourism Association (GTA)**
Natalie Kvachantiradze, Chairwoman
- 8. Business and Economic Centre (BEC)**
Natia Katsiashvili, Special Advisor
- 9. Georgian Association- Women in Business (GAWB)**
Nino Elizbarashvili, President
- 10. Georgian-Ukrainian Business Club (GUBC)**
Olga Verkhola, Executive Director
- 11. Young Entrepreneurs Association (YEA)**
Khatia Papuashvili, Community Engagement Manager

USAID Governing for Growth (G4G) in Georgia

Deloitte Consulting Overseas Projects LLP

Address: 85 Z.Paliashvili Street, Tbilisi

Phone: +995 322 240115 / 16

E-mail: info@g4g.ge