

**Achievement of Market-Friendly Initiatives and Results Program
(AMIR 2.0 Program)**

Funded By U.S. Agency for International Development

Business Association Diagnostic Assessment

Final Report

**Deliverable for Business Management Initiative (BMI) Component, Task No. 231.3
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This report was prepared by Larry Milner, CAE, under contract with the Center for International Private Enterprise, in collaboration with Chemonics International Inc., prime contractor to the U.S. Agency for International Development for the AMIR Program in Jordan.

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EXECUTIVE SUMMARY

Background

The objective of the Business Association Diagnostic Assessment was to develop comprehensive qualitative and quantitative reports on the effectiveness and efficiency of ten Jordanian business associations, to which AMIR II will choose to provide financial and technical support during the next three years.

Diagnostic Tool

To accomplish the objective, a refined assessment tool, in the form of an in-depth survey questionnaire expanded and improved from an original diagnostic survey created under the auspices of AMIR I in 1998 and other resources provided by AMIR 2.0, was applied to the philosophy and the operation of ten Jordanian business groups. The diagnostic survey compares these associations to an international model that was based on management principles developed by the U.S. Chamber of Commerce and the American Society of Association Executives.

Ten Jordanian Associations

Upon the completion of the updating and the refinement of the tool, ten association diagnostics were completed including:

1. Amman Business & Professional Women's Association
2. Amman World Trade Center
3. Int@j, The Information Technology Association of Jordan
4. JABA, The American Chamber of Commerce in Jordan
5. Jordan Association of Mfg. of Pharmaceuticals and Medical Appliances
6. Jordan Export Association
7. Jordan Hotel Association
8. Jordan Intellectual Property Association
9. Jordan Tourists and Travel Agents
10. Young Entrepreneurs Association

Diagnostic Scoring

Using the revised diagnostic tool, the assessments show that USAID/AMIR has helped the associations that participated in the AMIR Business Association Initiative Component programs. The understanding of and the climate for associations has improved greatly since 1998 when AMIR staff and consultants began working with selected groups under the BAI Component, headed by Dr. Zaki Ayoubi.

A comparison of the 1998, the 2000, and the 2002 diagnostic survey scores indicate progress has been made by three out of the four business associations in the original group helped by AMIR.

The Jordan Trade Association (now named the Jordan Export Association) showed marked improvement by scoring 47% in 1998, 79% in 2000, and 80% in 2002. The Young Entrepreneurs Association scored 78% in 2000 and 82% in 2002. The Amman World Trade Center scored 65%, 74% and 73% respectively. The only group scoring less and showing somewhat a decline in effectiveness is the Amman Business and

Professional Women's Association. This organization scored 72% in 1998, 80% in 2000, and 65% in 2002.

On the 2002 survey, the association with the highest score was Int@j. It scored 97% and has, in two short years, become the model for other Jordanian and Middle Eastern associations. The reason for this outstanding score is because AMIR consultant Bob Ash, along with the former executive of the Amman World Trade Center, Mr. Ra'ed Bilbessi, established this new association using the experience from and recommendations of the AMIR program.

Jordan Tourists and Travel Agents (44%) scored the lowest and is a mandatory membership association. In addition to educating its members' employees, this association needs to be redirected towards promoting tourism for Jordan.

The Amman World Trade Center (73%), the Jordan Intellectual Property Association (83%), The Jordan Export Association (80%), the Young Entrepreneurs Association (82%), The Jordan Association of Pharmaceutical Manufacturers and Medical Appliances (74%), and JABA, the American Chamber of Commerce in Jordan (79%) are very good organizations with high-quality boards and able staffs with clear missions and objectives. The diagnostics of these associations show that the differences between these six groups are statistically insignificant. All, however, need to improve their communications and membership recruitment efforts and their public policy advocacy sophistication.

The Jordan Hotel Association (64%) is a good organization, however, similar to the Jordan Tourists and Travel Agents, it is a mandatory association, which limits its potential as it carries out certain governmental functions and mandates. This organization has not had the advantage of having an association professional to guide its structural development. The fact that several internationally trained hotel managers serve on the board of the association is one of the major reasons that JHA has become an effective organization.

The Amman Business and Professional Women's Association (BPWA) (65%) is a problem group because of the board of directors' philosophy of the organization's purpose and operation. After four years of AMIR support, this organization is attempting to reshape its philosophy and start over with more salient programs and services that are business-oriented instead of charitable in nature. This should be its last chance to be considered for AMIR funding.

It is important to note that this particular assessment methodology does not provide a complete assessment of the effectiveness of associations. It also does provide sufficient indication of the quality of an associations infrastructure and operations. Scoring is largely the result of assessment presence of documents or practices as opposed the quality thereof. For example, while the presence of association bylaws is scored, the quality of such bylaws may not be reflected in the scoring. This may be reflected in a separate intervention with the respondent associations.

General Recommendations

Specific recommendations are made in the summary section of each diagnostic; however, there are a few general recommendations that are apparent.

First and foremost, there is a strong need for a new association law to be passed in Jordan in order to clear up many of the problems uncovered by the diagnostics. The

present law contains a set of required elements in each association's so-called constitution. These elements were written by someone with no experience in association management and bare little or no resemblance to the various organizations' bylaws with which the boards are governing themselves. For example, the JABA constitution and bylaw wording conflicts over the methodology for electing its chief volunteer officer. The law sets out dues structures for associations that are totally impractical in light of today's need for financial stability. Many other examples cause one to suggest that the entire concept of an association law should be reconsidered. Associations in the United States are simply incorporated under the various state governments and there is no national association law governing such groups. This gives complete flexibility for them to be governed by the groups' members, who provide the finances, the philosophical underpinning, and the voluntary personnel to operate private associations. Privatizing associations would increase effectiveness dramatically in Jordan.

Secondly, it is recommended that an in-depth study needs to be conducted to determine the reality of the political and bureaucratic structure in Jordan. Until this type of study and its resultant information is completed, the effectiveness of the public policy advocacy efforts of most business associations will be limited. Association boards and staffs are encouraged by AMIR to become active in attempting to change government policies and laws that tend to discourage economic development; however, very few truly understand the complexity of the operation of the Jordanian government. Most advocacy efforts are directed toward "petitioning the King" through the ministerial posts at the head of various divisions of government. This has not proven to be a very effect method of fostering improvements in public policy. Common advocacy techniques directed at the legislative and the executive branches that are used in most constitutional governments have not developed in Jordan.

Thirdly, the Amman Business and Professional Women's Association should be carefully monitored to insure that promised philosophical changes actually occur. At the present time, it appears from the completion of the diagnostic assessment that the organization's major thrusts have been and continue to be social in nature as opposed to economic or business-oriented programs and services. While it is very important that such social activities continue to be performed through other organizations, it is questionable that the BPWA is the most effective group to carry out such charitable endeavors and that this organization would better serve its members by directing its efforts to the development and improvement of skills of the business and professional women in Amman.

Fourthly, additional professional public relations assistance is needed by nearly all of the associations involved in the assessment. While using some of the normal communication techniques used by business associations in other nations, the Jordanian groups have failed to grasp the need for sophisticated identification of vital target audiences, refinement of association messages, and development of appropriate media in order to tell the associations' stories to influential audiences. A professional communication expert should be brought to Jordan to help each business association design an appropriate public relations program.

Finally, a very high level of physiological and physical stress is apparent in the personnel of all of the associations that were diagnosed. Stress management training should be encouraged and funded. If not, there will be a large amount of personnel

burnout experienced by staffs causing a major amount of institutional turnover to take place. This will limit the effectiveness of the training and organizational efforts that AMIR has fostered over the past four years when experienced personnel leave because of stress-related reasons.

BUSINESS ASSOCIATION DIAGNOSTIC TOOL BACKGROUND OF DIAGNOSTIC TOOL

At the beginning of the AMIR – Jordan program in 1998, the Business Association Component, through a consultant contract with CIPE and a subcontract with Larry Milner, developed a device to measure the effectiveness of business associations and their programs, services, and activities. The Business Association Diagnostic compares Jordanian associations to an international model that was based on many of the management principles developed over many decades from efforts of the U.S. Chamber of Commerce¹ and the American Society of Association Executives.² The model was then modified to meet international standards and to apply to organizations around the world. Jordanian associations were diagnosed in 1998 and 2000. At the beginning of AMIR 2.0, the Business Management Initiative requested the development of a new and substantially detailed diagnostic tool using the same 10 primary criteria (listed below). The new diagnostic tool is designed to provide an in-depth analysis of the present state of affairs of associations undergoing an assessment, and to provide AMIR with a detailed understanding of strengths and weaknesses of associations. The detailed and expanded nature of the new tool also allows AMIR 2.0 the flexibility to administer it to associations that have received AMIR support in the past (1998 to 2001), and to those that have not.

STRATEGY AND METHODOLOGY

In 2002, the Jordanian business associations were diagnosed based on their primary mission of advocating improvement of public policies and promoting members' economic expansion. The diagnostic tool used ten criteria for organizational success. Each criterion compared an association to an international model to determine if it met standards set by the model. The term "association" in this document includes business associations, chambers of commerce, professional societies, nonprofit and non-governmental organizations.

BUSINESS ASSOCIATION ORGANIZATIONAL CRITERIA

- Criterion One: Mission, objectives, and documentation
- Criterion Two: Governing body, officers, and directors
- Criterion Three: Organizational structures and documents
- Criterion Four: Programs and services
- Criterion Five: Association staff
- Criterion Six: Financial planning and reporting
- Criterion Seven: Membership development and retention
- Criterion Eight: Communications and public relations

¹ The Accreditation Program of the U.S. Chamber of Commerce: A Guide to Organization Analysis and Evaluation, U.S. Chamber of Commerce, 1998.

Criterion Nine: Government affairs

Criterion Ten: Management systems and use of information technology

² Peer Review Program, American Society of Association Executives Association, 1998.

BUSINESS DIAGNOSTIC SCORING CHART

| Name of Association | 2002* | 2000** | 1998*** |
|--|-------|--------|---------|
| 1) Int@j | 97 | ---- | ---- |
| 2) Jordan Intellectual Property Association | 83 | ---- | ---- |
| 3) Young Entrepreneurs Association | 82 | 78 | ---- |
| 4) Jordan Export Association | 80 | 79 | 47 |
| 5) JABA, The American Chamber of Commerce in Jordan | 79 | ---- | ---- |
| 6) Jordan Assoc. of Mfg. Of Pharmaceuticals/MedApp | 74 | ---- | ---- |
| 7) Amman World Trade Center | 73 | 74 | 65 |
| 8) Amman Business & Professional Women's Association | 65 | 80 | 72 |
| 9) Jordan Hotel Association | 64 | ---- | ---- |
| 10) Jordan Tourists and Travel Agents | 44 | ---- | ---- |

* Business association diagnosed in 2002 by Larry Milner

** Business associations diagnosed in 2000 by Fred Whitting and Bob Ash

*** Business associations diagnosed in 1998 by Larry Milner

**DIAGNOSTIC ASSESSMENT
OF
AMMAN
WORLD TRADE CENTER**

BASIC FACTS ABOUT THE AMMAN WORLD TRADE CENTER

Business Association name: Amman World Trade Center

Address: P.O. Box 962140

Telephone: 962 6 5605791

Fax: 962 6 5685793

Email: info@awtc.com

Web Site: www.wtca.org

Name of Chief Volunteer: Mohammad Asfour

Title: Chairman/President

Name of Chief Paid Executive: Yassar Toukan

Title: Executive Director

Number of Members: 1,122

Date of Organization's Founding: 1991

Budget Size: 160,000 JD

In USD: \$225,600

SUMMARY OF KEY POINTS

Diagnostic Score: 73% as of 3/6/2002

The Amman World Trade Center, a for-profit business company, is a member of the International World Trade Center based in the USA. It is one of over 300 such groups in 100 nations that represent 500,000 affiliated members. The AWTC's mission is "to become a substantial growth engine in the Jordanian economy, providing its member-companies and the business community at large with valuable business tools, networking forums, and access to foreign markets through the effective use of their unique international network."

The stockholders are private companies involved in international trade. The Center has been actively involved in the adoption and implementation of the new USA/Jordan Free Trade Agreement. AWTC has and continues to play a leadership role in forming a coalition of business associations to promote the acceptance and implementation of this new Free Trade Agreement.

AWTC offers to its members the following services:

- 1) Networking on the local and international level
- 2) Providers of trade related information
- 3) International business exposure
- 4) Access to foreign markets
- 5) International conventions and trade shows
- 6) Training programs
- 7) Real estate management

According to the organization's chairman and executive director, AWTC is financially strong with a good cash position and robust balance sheet. It has an international brand name and a network of world trade centers in 100 nations. Training has been one of AWTC's strengths as well as good working relationships with the Jordanian government, foreign donors, and other non-governmental organizations. This Jordanian organization is striving to have a membership base of between 250 and 350 companies. It seeks to have high quality membership services and training components that are demand driven and financially profitable. AWTC is trying to cater to the needs of its members and the business community.

The management believes that a lack of a real estate facility is causing a lost opportunity for additional income. Housed presently in the Radisson SAS Hotel, the AWTC's suite of offices appears to be adequate for the association's current operations; however, the facility does not serve as the usual World Trade Center type of resource as in many other nations.

In addition, the need for qualified staff is a high priority of the executive director. He cites the need for a more sophisticated public relations program as justification for additional professional personnel. He also thinks the association's outdated database is

causing unnecessary problems and that there is an under utilization of the World Trade Center's international network by many of the Amman member companies.

The management is well aware of the four areas of activities that need to be improved: (1) more detailed operational and contingency planning; (2) a crisis management plan; (3) improved communication and public relations programs; and (4) a rethinking of AWTC's governmental affairs strategy. The organizational fundamentals are in place in each of these areas needing improvement; however, additional sophistication or expansion are indicated. A detailed discussion appears in the Findings under each Criterion.

Importantly, there has been very little or no forethought given to crisis management. In today's volatile world, it can be very hazardous for an organization not to be prepared to handle the impact of sudden events that can effect the image and the programs of the association in the future. Several worst-case scenarios should be considered with reaction plans developed to ameliorate negative impacts. With the recent history of the facilities with the name World Trade Center in New York, the Amman World Trade Center should at least go through a process of thinking through possible adverse scenarios.

Overall, AWTC is a very effective association with well-qualified leadership that will continue to add value to the Jordanian national economy over the coming years.

SPECIFIC RECOMMENDATIONS FOR AMMAN WORLD TRADE CENTER

Organizational Leadership and Planning

1. The AWTC board and staff should establish a crisis management plan to handle probable world events that will effect the World Trade Centers.
2. A formal vision statement would prove useful for AWTC.
3. Some term limitation for directors should be considered in order to infuse new thinking into the governing process from time to time.
4. A detailed operational plan should be completed and utilized by AWTC.

Communications

5. Staff needs to move to the next level of communication sophistication by developing further a plan to carefully identify AWTC's target audiences and to select the appropriate media to "speak to" those audiences.
6. A public relations professional needs to be hired by the executive director.
7. A core message needs to be developed and continually used in all publications and communications.

Government Affairs

8. At some point in the future, AWTC needs to increase its intensity in attempting to change public policy on behalf of its members by increasing its research capabilities and by adding more professionals to its staff.

Membership

9. A formalized needs assessment should be developed and utilized on a regular basis.
10. A cost of service calculation should be made to determine what each additional member costs AWTC. This calculation should be used to make certain that the dues are covering the costs of the membership.
11. The board and staff need to strengthen membership recruitment and retention plans and activities.
12. In addition to the electronic version, AWTC should consider publishing an annual membership directory that will be a revenue-producing document of great value to its members.
13. A written statement answering the question "What does the AWTC do for me today?" should be crafted and utilized to sell memberships.
14. An orientation plan for new members should be developed and executed to improve AWTC's retention rate.

Personnel

15. The executive director needs to work toward establishment of a Jordanian association executives group to establish a higher level of professional availability for personnel.
16. Time sheets for employees allocating personnel costs to various projects would give a more accurate picture of programming costs.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Vision Statement 0
- Mission statement 10
- Bylaws and charter 10
- Membership needs assessment 5
- Strategic plan 10

Findings

AWTC's mission statement and objectives are properly conceived. The organization's bylaws are current; however, with no term limits for directors, a mechanism does not exist to infuse new viewpoints into the leadership over time. Even though aware of members' desires, no formal needs-assessment is in place to track member input. The strategic plan is a good document, but needs a detailed annual operational plan.

Section Two

- Objectives 5
- Operational Plan 0
- Performance Audit 5
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members on Results of Action Plans 5

Findings

AWTC's comprehensive strategic plan is not as comprehensive as it needs to be, lacking a detailed annual operating plan that has assigned responsibilities, deadlines, and resources for its specific tasks.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 0
- Documentation of implementation of action plans 2.5

Findings

The leadership of AWTC has a strong grasp of their overall environment and their relative place in the new global economy. While the leadership has verbalized a few organizational scenarios, there is no formal contingency plan in place to cover unexpected operational events.

Total Possible Points = 100

Total Points for Criterion

77.5

CRITERION MAJOR FINDING

With the exceptions noted above in Findings, AWTC have developed the fundamental philosophy and organizational foundation that allows the board and the staff to focus on accomplishing its mission.

CRITERION TWO: GOVERNING BODY, OFFICERS, & DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)
 Total possible score for this Criterion is 100 points.

Section One

- Effective bylaws/constitution 10
- Commitment of officers to association (time & resources) 10
- Decision making capabilities and willingness of board 10
- Avoidance of micro-management by the board 10
- Volunteer officers' background / industry positions held by officers 10

Findings

AWTC has developed the normal corporate governance structure and procedures and conducts its business in a very effective and efficient manner.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant educational background 5
- Officer-orientation plan, training and association material 5
- Job descriptions for officers and directors 5
- Term limits of officers 0

Findings

As mentioned above, the term limits of directors, in AWTC case, may prove useful in the long run for the organization.

Section Three

- Staggered terms for officers 0
- Board culture 2.5
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for planning, brainstorming, administrative, and project planning meetings 2.5
- Attendance at board meetings 1.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 1

Findings

Attendance at board meetings could be better with all directors carrying their fair share of the decision making load.

Total Possible Points = 100 **Total Points for Criterion 90**

CRITERION MAJOR FINDING

With the exceptions noted above in Findings, AWTC's governing body is fundamentally sound based on the generally accepted corporate model.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)
 Total possible score for this Criterion is 100 points.

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 10
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 10

Findings

As a profit-making corporation, AWTC's organizational structure is fundamentally sound.

Section Two

- Published organizational chart 5
- Regular committee meetings 0
- Minutes of committee meetings 0
- Relationships between board and members 5
- Relationships between board and staff 5

Findings

Because AWTC is a private company that has adopted the international model of the WTC, association-type committee structure has been deemed inappropriate.

Section Three

- Number of standing committees 0
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 0
- Staff exposure to the board 0
- Documentation of committee structure 0
- Staff assignments to manage board functions & committees 0
- Committee orientation plan and materials 0
- Documentation of committee reports 0
- Analysis of committee chairs 0
- Lists of board and committee members 0
- Committee chair and member orientation materials 0

Findings

With a small board and a competent staff and with stockholders rather than members, AWTC is able to carryout the day-to-day operations with a minimum of input from its paying members. The association committee structure is designed to disperse power through several groups, but that control mechanism is unnecessary in a profit making organization like AWTC.

Total Possible Points = 100 **Total Points For Criterion 65**

CRITERION MAJOR FINDING

On the whole, AWTC is adhering to the generally accepted management principles for similar business corporations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's super-ordinate goal 5
- Analysis of specific goals of Program of Work 10
- Identification of measurements of success 10
- Analysis of results of previous time period 10

Findings

While AWTC has a very focused program, has adopted specific goals in its program of work, judges its success by the amount of profit it makes, and is a results-oriented organization, the staff in particular needs to decide on exact wording for the organization's super-ordinate goal. Then such a statement should be used in various messages at every opportunity. The present super-ordinate goal is somewhat fuzzy and needs to be sharpened.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 5

Findings

AWTC has been approaching its activities over the past four years by employing realistic goal-setting procedures.

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 0
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

AWTC is carrying out fundamentally sound administrative strategies that are appropriate for explaining the organization's programs and activities to its stockholders. Additional communications strategies will be discussed under Criterion Eight

Total Possible Points = 100

Total Points for Criterion

92.5

CRITERION MAJOR FINDING

AWTC's approach to programming is fundamentally sound. While there is always room for improvement, the current activities and programs fit well within the parameters established by the mission of the

organization. All activities and programs seem to be directed at promoting the basic organizational philosophy and goals.

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints:*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of professional staff 10
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 10
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 10
- Job description of executive staff 10

Findings

With a competent professional staff, AWTC has the experienced personnel who apparently are working on the same "wave length" and have documented extremely well the policies and procedures of the company.

Section Two

- Relevant experience of program staff 2.5
- Relevant experience of administrative staff 5
- Analysis of performance evaluation form 5
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Findings

Because of a limited pool of experienced and available job seekers, AWTC, like other Jordanian associations, has been hampered by the lack of experience of its personnel in the normal skills needed by an association. On-the-job training has been a necessity for personnel in Jordan. While competent and well-motivated people have been hired, the lack of previous experience in entry-level positions in association operations has caused some delays in achieving.

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 0
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 0
- Performance bonus plan 2.5
- Staff retention rate 1
- Staff awareness of importance of programming and financial success of organization 2.5

Findings

Staff retention rates should improve as the executive director builds his own team and attracts his own personnel choices in key positions. Comparative salary studies need to be made and employee time sheets would be useful in properly allocating personnel costs to specific programming activities.

Total Possible Points = 100

Total Points for Criterion 91

MAJOR CRITERION FINDING

Special Note: After the completion of this diagnostic, the AWTC executive director announced his resignation to accept a job in Saudi Arabia. This will cause a delay in further development of AWTC until

a new executive has been found and has time to develop the necessary orientation for operating the organization.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of the most recent financial reports 10
- Analysis of the current budget and link with strategic plan 10
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 10

Findings

As a profit making company, the financial reporting mechanism has been carefully established and proper procedures are diligently followed.

Section Two

- Stability and diversification of level of funding (including non-dues income) 5
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 5
- Overhead, personnel, and program costs are segregated 5

Findings

AWTC has established an enviable set of financial recording and analysis mechanisms that would serve any business corporation or business association quite well.

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 2.5
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized. 0

Findings

The only suggested improvement for AWTC would be to calculate the cost of servicing a member for one year. That figure could be used to increase required investment in the company or to change programming and staffing costs to fit the reality of a particular situation.

Total Possible Points = 100

Total Points for Criterion

97.5

MAJOR CRITERION FINDING

Proper accounting practices have been institutionalized at AWTC. Reports and financial safeguards seem to be in place and transparency of financial transactions is apparent in the various reports. Regular external audits are conducted. AWTC appears to be on a sound financial footing.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Central message answering question "what's in it for me?" 5
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 10
- Membership directory 10

Findings

While AWTC has been able to attract new investors and retain most existing stockholders, a better-organized effort can be undertaken to reach maximum market penetration. A central membership message along with allied membership tools and publications including a membership directory should be developed or improved.

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 0

Findings

A key to building loyalty and interest in any organization is a feeling of belonging and of participating in the important activities. A new member orientation program can contribute the attitude of "customer loyalty."

Section Three

- List the member benefits as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 0
- Committee preference cards sent annually to members 0
- New members immediately invited to serve on a committee 0
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 2.5
- Non-dues income sources & strategy to promote programs, products and services to members for discounts 2.5
- Orientation handout materials 0
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Findings

While some fundamental membership devices are in place, AWTC could improve its recruitment and retention rate by utilizing more professional techniques that have proved to work elsewhere.

Total Possible Points = 100

Total Points for Criterion 80

MAJOR CRITERION FINDING

AWTC has the fundamentals in place to have a very successful membership development program.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of core communication message 10
- Comprehensiveness of the communication plan relative to the strategic plan 10
- Analysis of professional communication staff 0
- Analysis of key target audiences 0
- Analysis of communication feedback mechanisms (assessment & tracking) 0

Findings

This is AWTC's weakest area. The executive director is in the process of hiring a professional public relations person who will hopefully institute the plans and concepts that have been discussed. In addition to finding an experienced professional, orientation and training time will be necessary to bring AWTC up to speed on a comprehensive and sophisticated communication effort.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 0
- Communication research with facts describing problems 5
- Analysis of writing for readership 0
- Correctly selected communication media 2.5
- Frequency of communication campaign 0

Findings

In addition to techniques and skills, sufficient communication research using surveys, focus groups, and feedback mechanisms need to be employed.

Section Three

- Communication plan that covers all parts of strategic plan 0
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 2.5
- Analysis of program brochures 2.5
- Analysis of news releases and media kit 2.5
- Analysis of Web site or Web sites 2.5
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

In today's world, a crisis management plan for unexpected events such as the September 11th attack on the NY World Trade Center should be developed. Several scenarios should be considered with operational plans laid out in case such events come to past.

Total Possible Points = 100

Total Points for Criterion 45

MAJOR CRITERION FINDING

More time, money, manpower, and brainpower should be used in concentrating on how it best to "tell AWTC's story" to potential investors and other important groups including the government, other associations, and opinion makers.

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- | | | |
|--|---|---|
| • Analysis of public policies that prohibit job creation | 5 | |
| • Analysis of obstacles to overcome to achieve economic growth | 5 | |
| • Analysis of business association's adopted government policy positions | | 0 |
| • Professional capabilities of government affairs staff | 0 | |
| • Analysis of issue briefs produced by the business association | 0 | |

Findings

AWTC, because it is a private company, has basically taken a hands-off attitude toward becoming heavily involved in public policy advocacy. The staff and the board have been involved in coalition efforts to promote such public initiatives at the US/Jordan Free Trade Agreement; however, governmental affairs is not seen as a major function of AWTC and its program of work.

Section Two

- | | | |
|--|---|---|
| • Establishment of public policy advocacy committee | 0 | |
| • Availability of staff to research legal and economic issues | | |
| • List of priority issues | 0 | |
| • Analysis of research reports produced or authorized | 0 | |
| • Analysis of reports to the board and the membership on government affairs activities | | 0 |

Findings

AWTC has not put in place the basic organizational fundamentals for success in public policy advocacy.

Section Three

- | | | |
|--|---|---|
| • Analysis of business association's participation in anti-corruption program | 0 | |
| • Analysis of government tax policies effect on business association's members | | 0 |
| • Tracking proposals through the legislative process | 0 | |
| • Testimony before public bodies on key issues | 0 | |
| • Grass roots campaign efforts | 0 | |
| • Coalition building efforts of association | 0 | |
| • Understanding of the political dynamics of the nation | 0 | |
| • Member education program on public policy | 0 | |
| • Ability to build public support for government policy changes | | 0 |
| • Ability to launch a letter writing campaign on key issues | 0 | |

Findings

If AWTC's strategy toward public policy advocacy changes, many advocacy techniques are available to associations and AWTC needs to make certain that it is utilizing the best approaches for its situation.

Total Possible Points = 100

Total Criterion Points 10

MAJOR CRITERION FINDING

A change in basic strategy toward advocacy might be in order for AWTC. Many for profit corporations around the world are deeply involved in attempting to influence public policy that will help economic growth, thereby helping their stockholders.

CRITERION TEN: MANAGEMENT SYSTEMS AND USE OF INFORMATION TECHNOLOGY

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of overall information technology systems to streamline activities (i.e., Microsoft Project for planning , MS Outlook prompts, MS Access for a member database to generate mailing lists, labels, etc) 10
- Executive computer and technology philosophy 10
- Staff computer efficiency and technical capabilities 5
- Operational policies & procedures manuals 10
- Documentation of record-keeping activities 10

Finding

An early participant in information technology of the 90s, AWTC is now ready to move to the next generation of software and hardware. While human capabilities are available, new IT equipment has not been a priority in the budget, therefore, AWTC is falling behind in fully utilizing available technology that would increase efficiency.

Section Two

- Availability and utilization of database software 5
- Analysis of Web site(s) 5
- Analysis of forms used in accordance with Operational Policies & Procedure manual 5
- Analysis of specific system hardware 5
- Utilization of e-business capacity 5

Finding

Using their existing IT system, AWTC has squeezed an amazing production out of their outdated programs.

Section Three

- Study of e-mail utilization 2.5
- Analysis of written communications – business letters, brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 2.5
- Utilization of fax machine networks 2.5
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 2.5
- Assessment of desktop publishing capabilities 0
- Evidence of technology upgrade awareness 2.5
- Evidence of technology upgrade plans 2.5

Findings

AWTC is a technology driven organization. Upgrades are in order and seeking new ways to utilize existing and future technology should always be high on the management's agenda.

Total Possible Points =100

Total Points for Criterion

83

MAJOR CRITERION FINDING

While it needs to upgrade its overall technical capabilities, AWTC has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization. It needs to leverage that available capacity to its fullest extent to meet major objectives.

SUMMARY SHEET FOR POINTS

| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 78 |
| Criterion Two: Governing body, Officers, and Directors | Points 90 |
| Criterion Three: Organizational Structures | Points 65 |
| Criterion Four: Programs, Services, and Activities | Points 93 |
| Criterion Five: Association Staff | Points 91 |
| Criterion Six: Financial Planning and Reporting | Points 98 |
| Criterion Seven: Membership Development and Recruiting | Points 80 |
| Criterion Eight: Communications and Public Relations | Points 45 |
| Criterion Nine: Government Affairs | Points 10 |
| Criterion Ten: Management Systems & Inform. Technology | Points 83 |
| Total Criteria Points | 733 |

FORMULA:
Total Criteria Points divided by 1000 equals
percentage score. $733/1000 = .73/100 = 73\%$

AMMAN WORLD TRADE CENTER

COMPARATIVE RATIO SCORE 73%

Certification Statement

Therefore, the Amman World Trade Center, a business corporation received a 73 percentage score, which illustrates that this private company has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/5/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
JORDAN INTELLECTUAL PROPERTY ASSOCIATION**

BASIC FACTS ABOUT JORDANIAN INTELLECTUAL PROPERTY ASSOCIATION

Business Association name: Jordanian Intellectual Property Association (JIPA)

Address: P.O. Box 926412

Telephone: 962 6 5515007

Fax: 962 6 5514603

Email: jipa@nets.com.jo

Name of Chief Volunteer: Murad Bushnaq

Title: President

Name of Chief Paid Executive: Rana Diab

Title: Executive Director

Date of Organization's Founding: 1998

Budget Size: 7,000 JD

In USD: \$9,870

SUMMARY OF KEY POINTS IN DIAGNOSTIC

Diagnostic Assessment Score: 83% as of 3/21/2002

The Jordanian Intellectual Property Association (JIPA) is a non profit business group set up to advocate changes in public policy to “protect intellectual creativity and enhance its outcome for Jordan to reach the cultural and economic status for which it aspires.” Its mission is to “spread awareness of, and to create a strong infrastructure for IPR and its industries to prosper in Jordan.” A specialized business association, JIPA represents the fastest growing exporting companies in Jordan, including businesses that produce computer hardware and software, audio visual presentations, publishing and pharmaceutical industries, lawyers, trademark registrars, government employees and other associates.

The goals of JIPA are (1) to represent the members’ interest before the Jordanian government to enact or modify laws that protect their creativity, inventions, and innovations; (2) to partner with government to insure that all branches of the public sector effectively implement the existing intellectual property rights (IPR) laws; (3) to build public awareness of the moral, ethical, and economic values of observing the existing IPR laws; (4) to assist members in protecting their products through training and educational programs, research studies and sharing current information; (5) to serve as a credible reference for information regarding IPR issues for the government, the media, and the commercial sectors; and (6) to develop relationships with international organizations with similar missions and goals.

JIPA has intellectual-property-law-training programs for personnel in the judiciary, the customs department, the trademark office, the board of censors, and the lawyers in the intricacies of IPR. It also has established a national library on intellectual property issues.

The association appears to have strong leadership at both the board and staff levels. The association’s strategic plan and the operational plan are currently being revised to fit the planning concepts outlined at the Dead Sea Conference of AMIR’s BMI Component in March of 2002.

Housed in an attractive office facility, the organization’s professional staff consists of five people who appear to be competent in their various fields of activities. Headed by a very capable volunteer president and a professional executive director, the day-to-day operations appear productive and efficient using adequate technology and management procedures. There is adequate support for the association’s activities by the association’s members.

One area of weakness that should be addressed is the lack of a crisis management plan. There has been very little or no forethought given to crisis management. In today’s volatile world, it can be very hazardous for an organization not to be prepared to handle the impact of sudden events that can effect the image and the programs of the association

in the future. Several worst-case scenarios should be considered with reaction plans developed to ameliorate negative impacts.

JIPA's basic philosophy and objectives are properly conceived and overall, this organization appears to be a small but strong, well-managed single-purpose association that provides a valuable service for its members.

SPECIFIC RECOMMENDATIONS FOR JORDAN INTELLECTUAL PROPERTY ASSOCIATION

Organizational Philosophy

1. The JIPA board and staff should establish a crisis management plan.
2. The newly revised strategic plan needs to be completed.
3. A standard format for a program of work needs to be adopted.
4. Contingency plans should be adopted.
5. Micro-management by the volunteer president should be reduced.

Communications

6. Business English instead of conversational English should be adopted as a communication tool.

Finances

7. The board needs to establish an active audit committee at the board level.
8. Financial manager needs to develop a cost-of-service calculation for the amount of money spent each year on servicing members.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Vision Statement 0
- Mission statement 10
- Bylaws and charter 10
- Membership needs assessment 0
- Comprehensive strategic plan 0

Findings

While JIPA's chief volunteer does say the organization has a vision statement, in actuality, the statement is a variation of the association's mission statement instead of a description of where the organization's leadership plans to take the group over the next five to ten years. Its mission statement and objectives are properly conceived, but somewhat nebulous and unclear. The organization's bylaws are current. Even though the staff and directors seem to be aware of their members' desires, there is no formal needs-assessment mechanism in place to regularly and consistently track input on programs and services from members. Also, JIPA's strategic plan is currently being revised.

Section Two

- Objectives 5
- Program of Work 5
- Performance Audit 5
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members on Results of Action Plans 5

Findings

The Program of Work is outlined in an activity planner, a planning matrix and an activity justification device. These computer-based programs are well done, however, a more standard strategic planning methodology might be more effective in explaining the operations of the association.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 0
- Documentation of implementation of action plans 2.5

Findings

While the leadership has verbalized a few organizational scenarios, there is no formal contingency plan in place to cover unexpected events.

Total Possible Points = 100

Total Criterion Points 67.5

CRITERION MAJOR FINDING

It is very obvious that the leadership of the association is committed to carefully thinking through the philosophy of the organization and to meticulously planning the activities to accomplish the group's mission.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Effective bylaws/constitution 10
- Commitment of officers to association (time & resources) 10
- Decision making capabilities and willingness of board 10
- Avoidance of micro-management by the board 5
- Volunteer officers' background / industry positions held by officers 10

Findings

There is a possibility that there is some micromanaging of the staff by the volunteer president of the association.

A very capable and creative leader, Murad Bushnaq seems to be acting more as a chief staff officer rather than a volunteer policy maker. That approach is perhaps necessary and desirable at this stage of the organization's life-cycle, but sooner or later, the chief staff officer, a very capable Rana Diar, needs to be allowed to reach her full potential as the executive of the association. This, of course, should be a judgement call by the board and the president.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant educational background 5
- Officer-orientation plan, training and association material 5
- Job descriptions for officers and directors 5
- Term limits of officers 5

Section Three

- Staggered terms for officers 2.5
- Board culture 2.5
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic planning, brainstorming, administrative, and project planning meetings 2.5
- Attendance at board meetings 0
- Length of board meetings 2.5
- Participation of all directors in board meetings 0

Total Possible Points = 100

Total Points for Criterion 90

CRITERION MAJOR FINDING

JIPA's governing body is fundamentally sound and should serve the membership and the nation very well in the coming years.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 10
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 10

Findings

Without question, JIPA has developed a fundamentally correct organizational structure.

Section Two

- Published organizational chart 5
- Regular committee meetings 5
- Minutes of committee meetings 5
- Relationships between board and members 5
- Relationships between board and staff 5

Section Three

- Number of standing committees 2.5
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 1.5
- Staff exposure to the board 2.5
- Documentation of committee structure 2.5
- Staff assignments to manage board functions & committees 1.5
- Committee orientation plan and materials 0
- Documentation of committee reports 1.5
- Analysis of committee chairs 1
- Lists of board and committee members 1.5
- Committee chair and member orientation materials 0

Total Possible Points = 100

Total Points for Criterion 89.5

CRITERION MAJOR FINDING

On the whole, JIPA is adhering to the generally accepted management principles for similar business associations in other nations. It is managing its committee structure very well.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's super-ordinate goal 10
- Analysis of specific goals of Program of Work 10
- Identification of measurements of success 10
- Analysis of results of previous time period 10

Findings

JIPA has an impressive array of programs and services aimed at accomplishing the association's mission.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 2.5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 2.5
- Commitment to planning process 5

Findings

A more comprehensive annual report could be used as a marketing device for the organization. The present administrative report is good for board analysis, but is not appropriate for external communication purposes. Over reliance on financing by the volunteer president can prove to be a burden in the future.

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 2.5
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

JIPA is carrying out positive administrative strategies.

Total Possible Points = 100 **Total Points for Criterion 95**

CRITERION MAJOR FINDING

JIPA's approach to programming is fundamentally sound. While there is always room for improvement, the current activities and programs fit well within the parameters established by the mission of the organization. All activities and programs seem to be directed at promoting the basic organizational philosophy and goals. A more professional reporting process needs to be put into place with annual and quarterly reports.

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of professional staff 8
- Relevant experience of executive staff 8
- Key staff shares vision and mission of the board of directors 8
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 8
- Job description of executive staff 8

Findings

A very competent staff appears to be in place at JIPA.

Section Two

- Relevant experience of program staff 2.5
- Relevant experience of administrative staff 2.5
- Analysis of performance evaluation form 2.5
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 2.5
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 1.5
- Performance bonus plan 1.5
- Staff retention rate 1.5
- Staff awareness of importance of programming and financial success of organization 1.5

Total Possible Points = 100

Total Points for Criterion 79

MAJOR CRITERION FINDING

With a very good staff at the present time, JIPA should judiciously invest in its people providing training, motivation, and compensation that will encourage long-term employment.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of the most recent financial reports 10
- Analysis of the current budget and link with strategic plan 5
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 5

Findings

The association's strategic planning process is undergoing changes, so the present tie between the budget and the plan, as well as revenue and profit growth trends are irrelevant until the new process is completed.

Section Two

- Stability and diversification of level of funding (including non-dues income) 5
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 0
- Overhead, personnel, and program costs are segregated 5

Findings

A more detailed analysis of overhead costs allocated to specific programming costs might need to be established.

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 2.5
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized 0

Findings

The fundamentals for proper financial management are in place. One additional calculation would be useful to the decision making process: the calculation of the costs of service for members. The costs of mailings, the costs of printing, the costs of staffing, etc, should be part of an overall cost of service figure that will allow the executive director to determine if each new member is making or costing the organization money.

Total Possible Points = 100

Total Points for Criterion 82.5

MAJOR CRITERION FINDING

Proper accounting practices have been institutionalized at JIPA. Reports and financial safeguards seem to be in place. Transparency of financial transactions are common practice. Regular external audits are conducted. JIPA appears to be on moderately sound financial footing; however, cash flow problems need to be watched carefully.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer’s Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Central message answering question “what’s in it for me?” 10
- Documentation of membership list 10
- Analysis of membership brochure 5
- Total number of current members & retention rate 10
- Membership directory 10

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 5

Section Three

- List the benefits of becoming a member of the association as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 2.5
- Committee preference cards sent annually to members 0
- New members immediately invited to serve on a committee 0
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 2.5
- Non-dues income & strategy to promote programs, products and services for members discounts 2.5
- Orientation handout materials 2.5
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Findings

Some additional membership recruitment and retention techniques need to be implemented.

Total Possible Points = 100

Total Points for Criterion 90

MAJOR CRITERION FINDING

JIPA has a fundamentally sound approach to recruiting new members. The future number of members for their association seems to be limited only by the restrictions on membership placed by the board.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of core communication message 10
- Comprehensiveness of the communication plan relative to the strategic plan 5
- Analysis of professional communication staff 5
- Analysis of key target audiences 10
- Analysis of communication feedback mechanisms (assessment & tracking) 5

Findings

JIPA's approach to communicating its message has obviously been effective; however, it could have been much more effective if business English is used instead of the vernacular of conversational English. It will make publications appear much more professional.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 5
- Analysis of writing for readership 0
- Correctly selected communication media 5
- Frequency of communication campaign 5

Findings

In addition to techniques and skills, sufficient communication research using surveys, focus groups, and feedback mechanisms need to be employed.

Section Three

- Communication plan that covers all parts of strategic plan 2.5
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 0
- Analysis of program brochures 2.5
- Analysis of news releases and media kit . 2.5
- Analysis of Web site or Web sites 0
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

A well thought out approach using the proper media for each selected targeted audience needs to be implemented.

Total Possible Points = 100

Total Points for Criterion 70

MAJOR CRITERION FINDING

Communication efforts are very good, but a careful look at the professional approach to writing and graphics would help the efforts to tell JIPA's story.

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of public policies that prohibit job creation 5
- Analysis of obstacles to overcome to achieve economic growth 10
- Analysis of business association's adopted government policy positions 10
- Professional capabilities of government affairs staff 5
- Analysis of issue briefs produced by the business association 0

Findings

JIPA is doing an effective job of advocating changes in public policy, but it is not documenting its approaches or achievements. Without board policy positions and without properly researched issue briefs for business and political decision-makers, JIPA is limiting its successes by what it is not doing rather than by what it is doing.

Section Two

- Establishment of public policy advocacy committee 5
- Availability of staff to research legal and economic issues 5
- List of priority issues 5
- Analysis of research reports produced or authorized 5
- Analysis of reports to the board and the membership on government affairs activities 5

Findings

The fundamentals for success in public policy advocacy are in place at JIPA.

Section Three

- Analysis of business association's participation in anti-corruption program 2.5
- Analysis of government tax policies effect on business association's members 2.5
- Tracking proposals through the legislative process 2.5
- Testimony before public bodies on key issues 2.5
- Grass roots campaign efforts 0
- Coalition building efforts of association 2.5
- Understanding of the political dynamics of the nation 2.5
- Member education program on public policy 2.5
- Ability to build public support for government policy changes 2.5
- Ability to launch a letter writing campaign on key issues 1

Findings

Many advocacy techniques are available to associations and JIPA needs to make certain that it is utilizing the best approaches for its situation.

Total Possible Points = 100

Total Criterion Points

76

MAJOR CRITERION FINDING

JIPA has been successful in public policy advocacy; however, JIPA need to concentrate on making its program more professional and on improving its advocacy methodologies.

CRITERION TEN: MANAGEMENT SYSTEMS AND USE OF INFORMATION TECHNOLOGY

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of overall information technology systems to streamline activities (i.e. using Microsoft Project for the work plan, using MS Outlook prompts, using MS Access for a member database to generate mailing lists, labels, etc) 10
- Executive computer and technology philosophy 10
- Staff computer efficiency and technical capabilities 10
- Operational policies & procedures manuals 0
- Documentation of record-keeping activities 10

Finding

Documentation of operational policies and procedures needs to be developed at JIPA in the area of technology. Standards and procedures for each technology needs to be established and documented in order to institutionalize the organization's use of one of its most expensive investments.

Section Two

- Availability and utilization of database software 5
- Analysis of Web site(s) 0
- Analysis of forms used in accordance with Operational Policies & Procedure manual 0
- Analysis of specific system hardware 5
- Utilization of e-business capacity 5

Section Three

- Study of e-mail utilization 2.5
- Analysis of written communications – business letters, brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 2.5
- Utilization of fax machine networks 2.5
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 2.5
- Assessment of desktop publishing capabilities 2.5
- Evidence of technology upgrade awareness 2.5
- Evidence of technology upgrade plans 2.5

Findings

JIPA has attempted to create a Web site, but the design proved to be too expensive, so the management is beginning a process to bring online a more feasible site.

Total Possible Points = 100

Total Points for Criterion 80

MAJOR CRITERION FINDING

JIPA has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization. It needs to leverage that available capacity to its fullest extent to meet major objectives.

| |
|---------------------------------|
| SUMMARY SHEET FOR POINTS |
|---------------------------------|

| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 68 |
| Criterion Two: Governing Body, Officers, and Directors | Points 90 |
| Criterion Three: Organizational Structures | Points 90 |
| Criterion Four: Programs, Services, and Activities | Points 95 |
| Criterion Five: Association Staff | Points 79 |
| Criterion Six: Financial Planning and Reporting | Points 83 |
| Criterion Seven: Membership Development and Recruiting | Points 90 |
| Criterion Eight: Communications and Public Relations | Points 70 |
| Criterion Nine: Government Affairs | Points 76 |
| Criterion Ten: Management Systems & Information Technology | Points 80 |
| Total Criteria Points | 822 |

| |
|---|
| <p>FORMULA: Total Criteria Points divided by 1000 equals percentage score. $822/1000 = .822/100=82\%$</p> |
|---|

Jordanian Intellectual Properties Association

COMPARATIVE RATIO SCORE **82%**

Certification Statement

Therefore, the Jordanian Intellectual Properties Association, a business association received an 82 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/21/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
JORDAN HOTEL ASSOCIATION**

BASIC FACTS ABOUT THE JORDAN HOTEL ASSOCIATION**Business Association Name:** Jordan Hotel Association**Address:** P.O. Box 9905**Telephone:** 962 6 567 1691**Fax:** 962 6 567 1692**Email** jha@go.com.jo**Web Site:** www.johotels.com**Name of Chief Volunteer:** Michael Nazzal**Title:** Chairman**Name of Chief Paid Executive:** Bassam Kawash**Title:** General Manager/Consultant**Date of Organization's Founding:** 1969**Number of Members:** 385**Budget Size:** 140,000 JD**In USD:** \$197,400

SUMMARY OF KEY POINTS

Diagnostic Score: 64% as of 3/13/2002

The Jordan Hotel Association is a not-for-profit business association that represents 385 member hotels that comprise 17,000 rooms in Amman, Petra, Jerash, Aqaba, Irbid, Madaba, and the Dead Sea. By law, membership in JHA is mandatory for all hotels in the nation, thereby making JHA an arm of the government. This quasi-governmental organization's mission is to preserve the rights and interests of its member hotels through cooperation with the Ministry of Tourism and concerned organizations. JHA collects information and statistics on tourists and circulates the information to its members. The association also prepares draft laws addressing hotel business issues and submits the proposals for ratification by concerned government ministries.

The objectives of JHA are to (1) protect the hotel industry interests and safeguard its members rights; (2) set and monitor the industry standards; (3) enhance and develop the hotel industry in cooperation with relevant governmental or private organizational bodies; (4) gather information, compile statistics, prepare studies and research work related to the hospitality industry; (5) develop legislation and laws for the industry; (6) organize local and international conferences and conventions related to the hotel industry; (7) organize training courses to support the hotel sector; (8) cooperate with similar Arab and international hotel and restaurant associations; (9) collaborate with the public and private sectors for environmental issues; and (10) publish the association's newsletter and hotel directory.

JHA is the major shareholder of Amman College for Hospitality and Tourism Education that provides training and educational materials for the lodging industry.

Headed by Michael Nazzal, the owner-operator of the Radisson SAS Hotel in Amman, the association has been in operation for over 30 years. A new executive, Mr. Bassam Kawash, is managing both the JHA and the Jordan Restaurant Association on a temporary basis. A well-defined committee structure has been established including the following: Planning Committee, Social and Public Relations Committee, Classification and Hotel Standards Committee, and Training and Education Committee.

While the JHA has not adopted the standard terminology and procedures generally accepted in the association management field, the organization has established over time the necessary functions that make the JHA a successful organization. Though the JHA did not score as well as expected when compared to the diagnostic model, the caliber of business people involved in the organization has established the functions and activities that are needed to be successful in helping its members. Housed in a very attractive new facility, the professional staff appears to be very effective in carrying out the day-to-day operations. With an appealing Web site and a professional-looking newsletter, JHA communicates with its members on a regular basis.

Areas that JHA should concentrate on improving should be (1) developing a strategic plan and an annual program of work; (2) developing a stronger communication and membership relations program; (3) reassessing its philosophy on governmental affairs; and (4) upgrading information technology system.

JHA's basic philosophy and objectives are properly conceived and the association appears to be a well-managed, strong business association with a bright future of providing necessary programs and services to Jordan's hotels and the traveling public.

SPECIFIC RECOMMENDATIONS FOR THE JORDAN HOTEL ASSOCIATION

Organizational Philosophy

1. The JHA board and staff should establish a crisis management plan.
2. Board and staff needs to develop a quantitative measurement of success.

Communications

3. Staff with board's input and approval needs to further develop the association's super-ordinate goal along with its core public relations message answering the question for members, "What's in it for me?"

Government Affairs

4. Staff should utilize issue briefs in governmental affairs program.

Finances

5. Board needs to strengthen linkage between program of work and budget.
6. Staff needs to segregate overhead and programming costs with personnel costs allocated to various programs by using employee time sheets.
7. Chairman needs to establish an active audit committee at the board level.
8. Financial manager needs to develop a cost-of-service calculation for the amount of money spent each year on servicing members.

Leadership

9. Chairman along with the executive director needs to develop formal orientation plan and material for board, committee chair, new members, and staff.

Technology

10. Staff with help of a consultant needs to document policies and procedures in manual format for information technology of association.
11. Staff needs to upgrade software.

CRITERION ONE: MISSION, OBJECTIVES, AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Vision Statement 0
- Mission statement 5
- Bylaws and charter 10
- Membership needs assessment 5
- Comprehensive strategic plan 0

Findings

The officers and directors have not had formal training or gone through a strategic planning process normally used to define the philosophy of associations. Over its thirty years of existence, a well-developed philosophy has been created even though it does not fit with in the standard perimeters in the association field. The staff has developed an extensive hotel operations checklist that is used as a needs assessment tool to identify needed training programs and services.

Section Two

- Objectives 5
- Integrated Action Plan 0
- Performance Audit 0
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members on Results of Action Plans 5

Findings

The Integrated Action Plan for the year and formal performance audits should be employed with specific, measurable, and achievable goals that have estimated resource needs and set deadlines. More sophisticated planning methodologies need to be employed in order for JHA to reach its full potential.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 0
- Documentation of implementation of action plans 0

Findings

While the leadership can verbalize the environmental factors that effect their association, there is no formal documentation that actually institutionalizes the organization's efforts.

Total Possible Points = 100 Total Points for the Criterion 55

CRITERION MAJOR FINDING

The JHA needs to have a formal strategic plan and an annual operating plan in addition to a formal vision and mission statement. Without documentation of the fundamentals of association management, the organization has not reached its full potential for providing services and programs for its members.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Effective bylaws/constitution 5
- Commitment of officers to association (time & resources) 5
- Decision making capabilities and willingness of board 10
- Avoidance of micro-management by the board 10
- Volunteer officers' background / industry positions held by officers 10

Findings

The current bylaws and constitution have served JHA well over its thirty years existence. Because of the caliber of people on the board and on the staff, JHA is operating very successfully in spite of the fact that they have developed their own policies and procedures without the knowledge available from the experience of other types of associations.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant educational background 5
- Officer-orientation plan, training and association material 0
- Job descriptions for officers and directors 0
- Term limits of officers 5

Findings

JHA has a complete lapse in proper documentation of normal association functions.

Section Three

- Staggered terms for officers 2.5
- Board culture 2.5
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic, brainstorming, administrative, and project planning meetings 0
- Attendance at board meetings 2.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 2.5

Findings

In addition to the staggered terms dilemma, attendance at board meetings has been less than perfect, thereby limiting the organization's broad-based representation. With an entirely new board to be installed in the next few months, it remains to be seen if this particular problem will be improved with the next group of leaders.

Total Possible Points = 100

Total Points for Criterion

77.5

CRITERION MAJOR FINDING

In association management, there are no right and wrong ways of developing the governance for a particular organization. What works is more important than form. JHA over the years has found what works for the association and its members.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 5
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 5

Findings

Without question, JHA has developed a fundamentally sound organizational structure.

Section Two

- Published organizational chart 5
- Regular committee meetings 2.5
- Minutes of committee meetings 5
- Relationships between board and members 5
- Relationships between board and staff 5

Findings

Not all the committees are as effective as the management would like.

Section Three

- Number of standing committees 2.5
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 0
- Staff exposure to the board 2.5
- Documentation of committee structure 2.5
- Staff assignments to manage board functions & committees 2.5
- Committee orientation plan and materials 0
- Documentation of committee reports 0
- Analysis of committee chairs 2.5
- Lists of board and committee members 2.5
- Committee chair and member formal orientation materials 0

Findings

There apparently is very limited formal orientation for board, staff, committee chairs or members.

Total Possible Points = 100 Total Points for Criterion 77.5

CRITERION MAJOR FINDING

On the whole, JHA is using generally accepted management principles for businesses rather than for non-profit business associations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of major focus of Program of Work 5
- Explanation of the Program of Work's super-ordinate goal 5
- Analysis of specific goals of Program of Work 5
- Identification of measurements of success 0
- Analysis of results of previous time period 0

Findings

JHA has not fully developed the normal association tools for operations such as a standard program of work, a written super-ordinate goal, specific goals, or measurements of success; however, it is providing excellent programs and services for its members.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 0

Findings

This association could benefit greatly by a highly developed and sophisticated strategic planning process.

Section Three

- Measurement of involvement of stakeholders in planning process 0
- Coordination between fiscal planning and program planning 0
- Coordination between programming committees 0
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

JHA is basically doing their own thing without the benefit of tried and true association principles that have been developed by other organizations in countries around the world.

Total Possible Points = 100 Total Points for Criterion 52.5

CRITERION MAJOR FINDING

JHA's approach to programming is fundamentally sound. Through their staff visits to their members, the association finds a need of its members, then fills the need with seminars, programs, and services.

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)
 Total possible score for this Criterion is 100 points.

Section One

- Analysis of professional staff 5
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 10
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 0
- Job description of executive staff 10

Findings

JHA has placed on the “back burner” personnel policies and procedures documentation. The executive director has no formal training in association management, but his on-the-job experience would be enviable in most groups.

Section Two

- Relevant experience of program staff 5
- Relevant experience of administrative staff 5
- Analysis of performance evaluation form 5
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Findings

The professional staff appears to be competent, well trained, and highly motivated with specific assignments.

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 0
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 0
- Performance bonus plan 0
- Staff retention rate 1
- Staff awareness of importance of programming and financial success of organization 2.5

Findings

While many normal personnel activities are conducted on a regular basis, JHA’s productivity could be improved with a few additional personnel techniques. For example, time sheets should be implemented to make certain that staff costs are being charged to appropriate programming budgets.

Total Possible Points = 100 **Total Points for Criterion 76**

MAJOR CRITERION FINDINGS

Because of the changing of the executive director’s position from a part-time consulting position to full-time management employment, the fundamental of good association management might be improved.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of the most recent financial reports 5
- Analysis of the current budget and link with strategic plan 0
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 10

Findings

Over the years, the business-oriented board has demanded a well-established set of financial statements that are transparent and audited carefully. The major flaw in this criterion is that JHA does not utilize to its fullest extent the linkage between the organization's planing process and its budgeting. With no formal program of strategic planning, JHA is limiting the potential of its very carefully constructed financial management data.

Section Two

- Stability and diversification of level of funding (including non-dues income) 5
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 0
- Strategy in place with specific revenue goals 0
- Overhead, personnel, and program costs are segregated 0

Findings

JHA needs to institutionalize its financial data into more useful tools for better management.

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 0
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 0
- Grant writing capability 0
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized. 0

Findings

One additional calculation would be useful. The calculation for the costs of service for members answers the question "What does it cost JHA to have a member on the rolls?" The costs of mailings, printing, staffing, etc will allow the executive director to determine if each new member is making or losing the organization money.

Total Possible Points =100

Total Points for Criterion 60

MAJOR CRITERION FINDING

The fundamentals for proper financial management are in place at JHA. Proper accounting practices apparently are being used at JHA. Reports, financial safeguards, and transparency are common practice.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Central message answering question "what's in it for me?" 5
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 10
- Membership directory 0

Findings

JHA is a mandatory membership association. In order for a hotel to get a license from the Jordanian government, the applicant must be a member of JHA. This gives the association a one hundred percent market penetration for membership and makes it an arm of the government of Jordan.

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 0

Findings

Mandatory membership in JHA makes membership recruitment programs not relevant; however, a strong membership-relations program could conceivably help strengthen the organization by building member loyalty and satisfaction.

Section Three

- List the benefits of becoming a member as opposed to listing only the programs and activities 0
- Formal orientation session for new members 0
- Committee preference cards sent annually to members 0
- New members immediately invited to serve on a committee 0
- Analysis of membership application 0
- Set targets for number of members to be acquired 0
- Non-dues income to promote programs, products and services to members for discounts 2.5
- Orientation handout materials 0
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Findings

Mandatory membership exempts JHA from the normal pressures of selling memberships in order to survive. This causes an obvious lack of emphasis on satisfying their "customers."

Total Possible Points = 100

Total Points for Criterion 62.5

MAJOR CRITERION FINDING

Mandatory membership creates a totally different atmosphere for JHA than is being experienced in other associations in Jordan.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of core communication message 5
- Comprehensiveness of the communication plan relative to the strategic plan 0
- Analysis of professional communication staff 10
- Analysis of key target audiences 10
- Analysis of communication feedback mechanisms (assessment & tracking) 0

Findings

JHA's approach to communicating its message is apparently effective; however, it could have been much more effective by several magnitudes had sophisticated techniques and skills been used. This is the major weakness of the organization and improvements can be easily attained if this function of the association is prioritized and highly regarded by the leadership and if sufficient funds are spent.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 5
- Analysis of writing for readership 5
- Correctly selected communication media 5
- Frequency of communication campaign 5

Findings

In addition to techniques and skills, sufficient communication research using surveys, focus groups, and feedback mechanisms might be employed if JHA decides to broaden its sphere of influence.

Section Three

- Communication plan that covers all parts of strategic plan 0
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 0
- Analysis of program brochures 2.5
- Analysis of news releases and media kit 2.5
- Analysis of Web site or Web sites 2.5
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

As a quasi-governmental body, JHA's leadership does a minimum amount of communication with its membership.

Total Possible Points = 100

Total Points for Criterion 65

MAJOR CRITERION FINDING

Membership development and communications are the weak links in the organizational structure for JHA. More time, money, manpower, and brainpower should be used in concentrating on how best to "tell JHA's story."

CRITERION NINE: GOVERNMENTAL AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- | | | |
|--|----|---|
| • Analysis of public policies that prohibit job creation | 10 | |
| • Analysis of obstacles to overcome to achieve economic growth | 10 | |
| • Analysis of business association's adopted government policy positions | | 0 |
| • Professional capabilities of government affairs staff | 0 | |
| • Analysis of issue briefs produced by the business association | | 0 |

Findings

Because JHA is a combination of a private business association and a quasi-governmental entity, its effectiveness in governmental relations is limited to making suggestions to the government for changes in public policy.

Section Two

- | | | |
|--|---|---|
| • Establishment of public policy advocacy committee | 0 | |
| • Availability of staff to research legal and economic issues | 5 | |
| • List of priority issues | 5 | |
| • Analysis of research reports produced or authorized | 5 | |
| • Analysis of reports to the board and the membership on government affairs activities | | 5 |

Findings

JHA is the organization that the Minister of Tourism looks to for input from the private sector. Because of its quasi-government relationship, its influence is blunted because the government holds the "purse-strings" over the members. Strong public policy advocacy is not in the future of JHA unless its leadership decides to become a private business association funded by members and non-dues income.

Section Three

- | | | |
|--|-----|---|
| • Analysis of business association's participation in anti-corruption program | 0 | |
| • Analysis of government tax policies effect on business association's members | | 0 |
| • Tracking proposals through the legislative process | 0 | |
| • Testimony before public bodies on key issues | 0 | |
| • Grass roots campaign efforts | 0 | |
| • Coalition building efforts of association | 2.5 | |
| • Understanding of the political dynamics of the nation | 2.5 | |
| • Member education program on public policy | 0 | |
| • Ability to build public support for government policy changes | | 0 |
| • Ability to launch a letter writing campaign on key issues | 0 | |

Findings

Advocacy techniques that are available to most Jordanian associations will not be utilized by JHA because of its unique position with the Jordanian government.

Total Possible Points = 100

Total Criterion Points 45

MAJOR CRITERION FINDING

From JHA's point-of-view, the association has been successful in the governmental affairs arena because it has a legal basis for direct input into the government's decision-making process. This relationship also neuters JHA should there be strong disagreement with certain public policies. The trade-off so far has been to JHA's advantage, but there is no guarantee that that will be the case in future scenarios.

**CRITERION TEN: MANAGEMENT SYSTEMS
AND USE OF INFORMATION TECHNOLOGY**

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of overall information technology systems to streamline activities (i.e., Microsoft project for planning, MS Outlook prompts, MS Access for databases to generate mailing lists, labels, etc) 0
- Executive computer and technology philosophy 10
- Staff computer efficiency and technical capabilities 10
- Operational policies & procedures manuals 0
- Documentation of record-keeping activities 10

Finding

Documentation of operational policies and procedures needs to be developed at JHA in the area of technology. Standards and procedures for each technology needs to be established and documented in order to institutionalize the organization's use of one of its most expensive investments.

Section Two

- Availability and utilization of database software 5
- Analysis of Web site(s) 5
- Analysis of forms used in accordance with Operational Policies & Procedure manual 0
- Analysis of specific system hardware 5
- Utilization of e-business capacity 0

Finding

Routine technology management documentation needs to be adopted.

Section Three

- Study of e-mail utilization 2.5
- Analysis of written communications – business letters brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 2.5
- Utilization of fax machine networks 2.5
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 2.5
- Assessment of desktop publishing capabilities 2.5
- Evidence of technology upgrade awareness 2.5
- Evidence of technology upgrade plans 2.5

Findings

JHA is a technology driven organization. Upgrades are always in order and seeking new ways to utilize existing and future technology should always be on the management's agenda.

Total Possible Points = 100

Total Points for Criterion 70

MAJOR CRITERION FINDING

JHA has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization.

| |
|---------------------------------|
| SUMMARY SHEET FOR POINTS |
|---------------------------------|

| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 55 |
| Criterion Two: Governing Body, Officers, and Directors | Points 78 |
| Criterion Three: Organizational Structures | Points 78 |
| Criterion Four: Programs, Services, and Activities | Points 53 |
| Criterion Five: Association Staff | Points 76 |
| Criterion Six: Financial Planning and Reporting | Points 60 |
| Criterion Seven: Membership Development and Recruiting | Points 63 |
| Criterion Eight: Communications and Public Relations | Points 65 |
| Criterion Nine: Government Affairs | Points 45 |
| Criterion Ten: Management Systems & Information Technology | Points 70 |
| Total Criteria Points | 642 |

| |
|---|
| <p>FORMULA: Total Criteria Points divided by 1000 equals percentage score. $642/1000 = .642/100=64\%$</p> |
|---|

Jordan Hotel Association

COMPARATIVE RATIO SCORE 64%

Certification Statement

Therefore, the Jordan Hotel Association, a business association, received a 64 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/13/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
JORDAN EXPORT ASSOCIATION**

BASIC FACTS ABOUT THE JORDAN EXPORT ASSOCIATION

Business Association name: Jordan Export Association, (Jordan Trade Association)

Address: P.O. Box 830432

Telephone: 962 6 585603

Fax: 962 6 5685605

Email: jta@go.com.jo

Web Site: www.jta-jordan.org and www.justrade.jo

Name of Chief Volunteer: H.E. Samih Darwazeh

Title: Chairman/President

Name of Chief Paid Executive: Halim Abu Rahmeh

Title: Managing Director

Date of Organization's Founding: 1989

Number of Members: 172

Budget Size: 160,000 JD

In USD: \$225,600

SUMMARY OF KEY POINTS

Diagnostic Score: 80% as of 3/5/2002

The Jordan Export Association, formerly known as the Jordan Trade Association, is a not-for-profit business association whose mission is to expand; support; and develop for its members, export markets for their quality goods and services. JEA is an effective organization that represents the major exporting business companies in Jordan. During the past year, one of JEA's major activities has been directed at supporting the approval and implementation of the Jordan Free Trade Agreement with the United States. The association has been actively involved in that undertaking as well as other governmental policy changes that encourage the development of the export economy

Private companies involved in exporting products and services are members of JEA. Though it has not been involved in developing industry standards or codes of conduct for its members, it has sponsored trade missions, training programs, human resource development, public policy advocacy, specialized trade studies and many other activities aimed at benefiting the association's members

JEA's objectives have been (1) to develop regional and international export trade opportunities for Jordanian goods and services; (2) promote Jordanian exports worldwide; (3) provide members with access to education and training programs which improve the quality of their goods and services as well as their opportunity for increasing exports; (4) promote dialogue and networking among members; (5) form coalitions and cooperate with other private sector organizations which complement and support the mission, goals and objectives of the JEA; (6) provide a substantive influential voice for effecting positive change on those public policy issues affecting JEA members; (7) establish and professionally deliver essential programs for members that achieve the mission of the organization and meet the needs of the membership; (8) maintain the JEA in a sound financial condition at all times; (9) provide members with on-line access to accurate and up-to-date regional and international market information, statistics and other relevant data, and (10) to establish and maintain an effective communications system.

JEA has strong leadership at both the board and staff levels. The association's strategic plan and the operational plan show that the organization has carefully selected issues of importance to Jordan and to its members. Housed in a modest office building, the organization's staff consists of six people who appear to be very competent in their various fields of activities. Headed by a knowledgeable executive director, the day-to-day operations appear productive and efficient, utilizing adequate technology and management procedures

Four areas of the association's activities can be improved: (1) the JEA governing body; (2) the membership development program; (3) the communications and public relations efforts; and (4) the association's governmental affairs endeavors. The fundamental management principles are in place in each of these areas needing

improvement; however, additional sophistication and expansion are indicated. A detailed discussion appears in the Findings under each Criterion in the following diagnostic study.

One major flaw: there has been very little or no forethought given to crisis management. In today's volatile world, it can be very hazardous for an organization that is dependent upon world developments not to be prepared to handle the impact of sudden negative events that could effect the future image and the programs of the association. Several worst-case scenarios should be considered with reaction plans developed to ameliorate negative impacts.

While JEA has been involved in some public policy advocacy efforts, there is a need to increase the sophistication and intensity of that element of the organization's program. As the US/Jordan Free Trade Agreement is implemented, more and more barriers to trade will become evident. Therefore, JEA needs to continue to be in the forefront of advocating public policy changes to help create more jobs for Jordanians by expanding exports.

Overall, JEA has made impressive progress over the four years that AMIR has been diagnosing the association's program of work. With a positive attitude toward cooperating with other Jordanian associations, JEA can consolidate its position of leadership within the business community. It is a well-managed, strong business association with a bright future of providing necessary programs and services to its members.

SPECIFIC RECOMMENDATIONS FOR THE JORDANIAN EXPORT ASSOCIATION

Organizational Leadership

1. All of the directors should move JEA higher on their priority list to spend the necessary time and energy to properly participate and to carry out the fiduciary and leadership duties of the position of director.
2. The JEA board and staff should establish a crisis management plan.
3. Chairman along with the executive director needs to develop formal orientation plan and material for board, committee chair, new members, and staff.

Financial

4. The board should establish an audit committee at board level.
5. A cost of service calculation should be made to determine the actual cost of servicing a member for one year.

Communications

6. Staff needs to move to the next level of communication sophistication by developing further a plan to carefully identify JEA's target audiences and to select the appropriate media to "speak to" those audiences.
7. Staff needs to develop mechanism to "listen carefully" to its members and the general public.
8. JEA should solicit professional communication assistance and possibly hire a staff expert in public relations.

Government Affairs

9. At some point in the future, JEA needs to increase its intensity in attempting to change public policy on behalf of its members by increasing its research capabilities and by adding more professionals to its staff.

Membership

10. The board and staff need to strengthen membership recruitment and retention plans and activities.
11. Members and staff need to spend more productive time and effort on membership retention.
12. In addition to the electronic version, JEA should consider publishing an annual membership directory that will be a revenue-producing document of great value to its members.

Personnel

13. The executive director, in concert with other association executives, needs to work toward establishment of a Jordanian association executives society to establish a higher level of professional availability of employees.

Technology

14. JEA should finish upgrading its Web site as soon as possible.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Vision Statement 10
- Mission statement 10
- Bylaws and charter 10
- Membership needs assessment 10
- Comprehensive strategic plan 10

Findings

JEA's vision and mission statement and objectives are properly conceived and well written the organization's bylaws are current. JEA has improved greatly over the past four years on the basic fundamentals of good association management.

Section Two

- Objectives 5
- Integrated Action Plan 5
- Performance Audit 5
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 4
- Annual Report to Members on Results of Action Plans 5

Findings

Minutes of the Executive Committee should be recorded.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 0
- Documentation of implementation of action plans 2.5

Findings

There are no formal or informal contingency plans in place to cover various scenarios. Other important philosophical and environmental elements affecting the association have been considered.

Total Possible Points = 100

Total Points for Criterion

96.5

MAJOR CRITERION FINDING

JEA volunteers and staff have a firm grip on its fundamental philosophy and on the environment in which it operates. The board and the management have been able to keep focused on its mission of expanding export markets for its member companies.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Effective bylaws/constitution 10
- Commitment of officers to association (time & resources) 5
- Decision making capabilities and willingness of board 5
- Avoidance of micro-management by the board 10
- Volunteer officers' background / industry positions held by officers 10

Findings

The officers and directors of the association are very influential and prominent business CEOs with very busy schedules. Consequently, the sometimes-mundane activities of JEA are not at the top of the directors' priority list, thereby causing the board to be less than one-hundred-percent effective. While most of the board members spend the necessary time and resources to serve effectively as directors, a few apparently are not willing or are not able to commit the time necessary to fully meet their obligations of governing the the associations' programs and events.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant education background 5
- Officer-orientation plan, training and association material 0
- Job descriptions for officers and directors 5
- Term limits of officers 5

Section Three

- Staggered terms for officers 2.5
- Board culture 0
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic and project planning, brainstorming, and administrative meetings 2.5
- Attendance at board meetings 1.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 1

Findings

JEA appears to be "doing things right." Time will tell if the association is doing "the right things."

Total Possible Points = 100

Total Points for Criterion 80

MAJOR CRITERION FINDING

Overall, JEA's governing body is fundamentally sound and is positioned to serve its members and the nation very well as the US/Jordan Free Trade Agreement is implemented and as Jordanian exporters expand their markets around the world.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 10
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 10

Findings

Without question, JEA has developed a fundamentally sound organizational structure as recommended by Mr. Bob Ash, business association consultant for AMIR - Jordan.

Section Two

- Published organizational chart 5
- Regular committee meetings 5
- Minutes of committee meetings 5
- Relationships between board and members 5
- Relationships between board and staff 5

Findings

No flaws were found in this area of association activities.

Section Three

- Number of standing committees 2.5
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 2.5
- Staff exposure to the board 1
- Documentation of committee structure 2.5
- Staff assignments to manage board functions & committees 2.5
- Committee orientation plan and materials 0
- Documentation of committee reports 2.5
- Analysis of committee chairs 2.5
- Lists of board and committee members 2.5
- Committee chair and member orientation materials 0

Findings

Orientation material and exposure to the board of other staff members may be appropriate for JEA to consider.

Total Possible Points = 100

Total Points for Criterion

93.5

MAJOR CRITERION FINDING

On the whole, JEA is adhering to the generally accepted management principles for similar business associations in other nations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's super-ordinate goal 10
- Analysis of specific goals of Program of Work 10
- Identification of measurements of success 10
- Analysis of results of previous time period 5

Findings

JEA's programs and services appear to be carrying out the association's mission, that of exporting Jordanian products and services. JEA has identified as its measurement of success the export revenue increases of its members, which is a proper measuring device for such an association.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 2.5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 5

Findings

Strongly committed to the planning process, the executive manager has become an expert in developing solid goals, objectives and strategies for the organization. The only problem is that an inordinate amount (60%) of the budget is spent on personnel. In most associations that figure is in the 40% range.

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 2.5
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

JEA is carrying out fundamentally sound administrative strategies that are appropriate for explaining the organization's programs and activities to its members and to the general public.

Total Possible Points = 100

Total Points for Criterion 92.5

MAJOR CRITERION FINDING

JEA's approach to programming is fundamentally sound. While there is always room for improvement, the current activities and programs fit well within the parameters established by the vision and mission of the organization. All activities and programs seem to be directed at promoting the basic organizational philosophy and goals. JEA is planning to build and strengthen its training programs by creating state-of-

the-art-training facilities that will be used to attract top Jordanian marketing manager, commercial attaches, and new ambassadors.

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of professional staff 10
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 10
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 10
- Job description of executive staff 10

Findings

With an excellent education, JEA's capable executive manager is valuable to Jordan. With additional training in interpersonal relationships, this executive will be a top international leader for many decades.

Section Two

- Relevant experience of program staff 5
- Relevant experience of administrative staff 5
- Analysis of performance evaluation form 5
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Findings

JEA, like other associations, has been hampered by the lack of available personnel with association skills. On-the-job training is a necessity. The lack of prior experience has caused delays in results. Additional fundamental skills training is a continuing challenge.

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 0
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 0
- Performance bonus plan 2.5
- Staff retention rate 2.5
- Staff awareness of importance of programming and financial success of organization 2.5

Findings

While many personnel activities are conducted regularly, JEA's productivity could be improved with a few additional personnel techniques. Every effort should be made to lower the employee turnover rate. Time sheets should be implemented to make certain that staff costs are being charged to appropriate programming budgets.

Total Possible Points = 100

Total Points for Criterion 95

MAJOR CRITERION FINDING

To improve the overall pool of available personnel, a private "organization of association executives" should be established to promote training in the field of association operations. Institutionalization of comparative salary analyses in addition to other cooperative activities such as personnel training and

interchange of best practices would improve the skills of people available to the Jordanian business associations.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of the most recent financial reports 10
- Analysis of the current budget and link with strategic plan 10
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 10

Findings

The fundamentals of financial management have been implemented at JEA along with transparency and efficiency in using the data for organizational planning.

Section Two

- Stability and diversification of level of funding (including non-dues income) 5
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 5
- Overhead, personnel, and program costs are segregated 5

Findings

An AMIR recommendation of lowering the cost of dues has not proven to be beneficial to JEA. The recommendation's purpose was to lower dues to increase new members, thus increasing the overall revenue. This has not proven to be successful. Perhaps better results would have been obtained if a stronger membership recruitment program had been implemented.

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 0
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized. 0

Findings

An audit committee should be established at the board level. Also, an additional calculation would be useful to the decision making process: the calculation the calculation of the cost-of-service for members. The key question is "What does it cost JEA to have a member on the rolls?" The expenses of mailings, printing, staffing, etc, should be part of an overall cost-of-service estimate that will allow the executive manager to determine if each new member is adding profits to the association's revenues.

Total Possible Points = 100

Total Points for Criterion 95

MAJOR CRITERION FINDING

Proper accounting practices have been institutionalized at JEA. Reports and financial safeguards seem to be in place and transparency of financial transactions is common practice. Regular external audits are conducted. JEA appears to be on a sound financial footing.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)
Total possible score for this Criterion is 100 points.

Section One

- Central message answering question "what's in it for me?" 10
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 10
- Membership directory 5

Findings

While JEA has been able to attract some new members and retain existing members, a better-organized effort can be undertaken to reach maximum market penetration. The central membership message, according to the executive manager, is "JEA is the gateway to the international markets." That is a powerful message and is being used in JEA's promotional literature. Unfortunately, JEA is behind in redesigning its Web site and has no printed copy of its membership directory.

Section Two

- Membership recruitment plan & system 2.5
- Total number of new members within the past year 2.5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 2.5
- New member orientation outline and handout material 2.5

Findings

A retention tool used by most associations is a carefully designed new member orientation program to make certain a dues payer is really sold on the value of the organization. Many innovative techniques for orienting new members are being utilized by associations around the world. These techniques should be explored and adopted if appropriate and practical for Jordanian business people. While JEA has a new member kit, additional orientation may prove valuable to retain long-term membership and develop stronger loyalty.

Section Three

- List the benefits of becoming a member of the association as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 2.5
- Committee preference cards sent annually to members 0
- New members immediately invited to serve on a committee 0
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 0
- Non-dues sources of income & strategy to promote discounted programs, products and services to members 2.5
- Orientation handout materials 2.5
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Findings

While some fundamental membership devices are in place, JEA could improve its recruitment and retention rate considerably by utilizing more professional techniques that have proved to work elsewhere.

Total Possible Points = 100 Total Points for Criterion 77.5

MAJOR CRITERION FINDING

JEA needs to become more sophisticated in the membership recruitment and retention arena. The staff should research, plan, adopt, and use the best techniques that have been developed by other associations and organizations.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of core communication message 10
- Comprehensiveness of the communication plan relative to the strategic plan 5
- Analysis of professional communication staff 5
- Analysis of key target audiences 0
- Analysis of communication feedback mechanisms (assessment & tracking) 2.5

Findings

JEA's core message is that the association is "the gateway to international markets." While it has a well-defined message, JEA lacks the specific communication plan to spread the message far and wide. A professional communication staff that identifies key target audiences and has well-developed feedback mechanisms would be extremely valuable to the association.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 5
- Analysis of writing for readership 5
- Correctly selected communication media 5
- Frequency of communication campaign 5

Findings

In addition to techniques and skills, sufficient communication research using surveys, focus groups, and feedback mechanisms need to be employed.

Section Three

- Communication plan that covers all parts of strategic plan 1.5
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 2.5
- Analysis of program brochures 2.5
- Analysis of news releases and media kit .25
- Analysis of Web site or Web sites 2.5
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

Though some communication media are being used, there does not seem to be an underlying logic or approach to selecting target audiences and matching communication channels to reach those audiences. A well thought out approach using the proper media for each selected targeted audience needs to be implemented.

Total Possible Points = 100 Total Points for Criterion 66.5

MAJOR CRITERION FINDING

Along with membership development, JEA's communication effort is one of the weakest links in the organizational activities. More time, money, manpower, and brainpower should be used in concentrating on what is the best way to "tell JEA's story."

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- | | | |
|--|----|---|
| • Analysis of public policies that prohibit job creation | 10 | |
| • Analysis of obstacles to overcome to achieve economic growth | 10 | |
| • Analysis of business association's adopted government policy positions | | 0 |
| • Professional capabilities of government affairs staff | 5 | |
| • Analysis of issue briefs produced by the business association | | 0 |

Findings

JEA has for many years attempted to have an influence on public policy. It has had some degree of success; however, the association needs to institutionalize its governmental affairs program by documenting its board's policies and utilizing issue briefs to educate its members.

Section Two

- | | | |
|--|---|---|
| • Establishment of public policy advocacy committee | 5 | |
| • Availability of staff to research legal and economic issues | | 0 |
| • List of priority issues | | 0 |
| • Analysis of research reports produced or authorized | 5 | |
| • Analysis of reports to the board and the membership on government affairs activities | | 5 |

Findings

The board needs to establish a priority list for public policy issues and additional professional staff in governmental affairs is needed at JEA.

Section Three

- | | | |
|--|-----|-----|
| • Analysis of business association's participation in anti-corruption program | 0 | |
| • Analysis of government tax policies effect on business association's members | | 2.5 |
| • Tracking proposals through the legislative process | | |
| • Testimony before public bodies on key issues | 0 | |
| • Grass roots campaign efforts | 0 | |
| • Coalition building efforts of association | 2.5 | |
| • Understanding of the political dynamics of the nation | 1 | |
| • Member education program on public policy | 0 | |
| • Ability to build public support for government policy changes | 0 | |
| • Ability to launch a letter writing campaign on key issues | | 0 |

Findings

Many advocacy techniques are available to associations. JEA needs to make certain that it is utilizing the best approaches for its national situation. There is little evidence that the wide variety of available techniques has been explored.

Total Possible Points = 100

Total Points 46

MAJOR CRITERION FINDING

JEA has been relatively successful in public policy advocacy because it has selected some key issues and has wisely used the contacts of its politically connected members. That approach can be successful in the short term, but for an association to be successful long-term, it must utilize the best advocacy techniques in addition to politics of personal influence.

CRITERION TEN: MANAGEMENT SYSTEMS/INFORMATION TECHNOLOGY

Purpose of Criterion Ten: *To assess the management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

| | |
|---|----|
| Analysis of overall information technology systems to streamline activities (i.e. Microsoft Project for work plan, MS Outlook prompts, MS Access for database to generate mailing lists, labels, etc) | 10 |
| Executive computer and technology philosophy | 10 |
| Staff computer efficiency and technical capabilities | 10 |
| Operational policies & procedures manuals | 0 |
| Documentation of record-keeping activities | 10 |

Finding

Documentation of operational policies and procedures needs to be developed at JEA in the area of technology. Standards and procedures for each technology needs to be established and documented to institutionalize the organization's use of one of its most extensive investments.

Section Two

| | |
|---|---|
| Availability and utilization of database software | 5 |
| Analysis of Web site(s) | 5 |
| Analysis of forms used in accordance with Operational Policies & Procedure manual | 0 |
| Analysis of specific system hardware | 5 |
| Utilization of e-business capacity | 0 |

Finding

A new Web site is under construction. Other routine technology management approaches including e-business need to be adopted.

Section Three

| | |
|--|-----|
| Study of e-mail utilization | 2.5 |
| Analysis of written communications – business letters, brochures, faxes, e-mails, etc. | 2.5 |
| Analysis of networking capabilities | 2.5 |
| Utilization of fax machine networks | 2.5 |
| Analysis of printing capabilities | 2.5 |
| Analysis of copying capabilities | 2.5 |
| Analysis of scanning capabilities | 2.5 |
| Assessment of desktop publishing capabilities | 2.5 |
| Evidence of technology upgrade awareness | 2.5 |
| Evidence of technology upgrade plans | 2.5 |

Findings

JEA is a technology driven organization. Upgrades are in order and seeking new ways to utilize existing and future technology should always be on the management's agenda.

| | | |
|------------------------------------|-----------------------------------|-----------|
| Total Possible Points = 100 | Total Points for Criterion | 80 |
|------------------------------------|-----------------------------------|-----------|

MAJOR CRITERION FINDING

JEA has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization.

| |
|---------------------------------|
| SUMMARY SHEET FOR POINTS |
|---------------------------------|

| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 97 |
| Criterion Two: Governing Body, Officers, and Directors | Points 80 |
| Criterion Three: Organizational Structures | Points 94 |
| Criterion Four: Programs, Services, and Activities | Points 93 |
| Criterion Five: Association Staff | Points 95 |
| Criterion Six: Financial Planning and Reporting | Points 95 |
| Criterion Seven: Membership Development and Recruiting | Points 67 |
| Criterion Eight: Communications and Public Relations | Points 46 |
| Criterion Nine: Government Affairs | Point 49 |
| Criterion Ten: Management Systems & Information Technology | Points 80 |

Total Criteria Points **796**

| |
|--|
| FORMULA: Total Criteria Points divided by 1000 equals percentage score. $796/1000 = .796/100=80\%$ |
|--|

Jordan Export Association

COMPARATIVE RATIO SCORE **80%**

Certification Statement

Therefore, the Jordanian Export Association, a business association received an 80 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/3/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
JORDAN ASSOCIATION OF MANUFACTURERS OF PHARMACEUTICALS
AND MEDICAL APPLIANCES**

**BASIC FACTS ABOUT THE JORDAN ASSOCIATION
OF MANUFACTURERS OF PHARMACEUTICALS AND
MEDICAL APPLIANCES**

Business Association name: Jordan Association of Manufacturers of Pharmaceuticals and Medical Appliances

Address: P.O. Box 941247

Telephone: 962 6 5605634

Fax: 962 6 569 1116

Email: info@jamp.com

Web Site: www.japm.com

Name of Chief Volunteer: Mazen Darwazeh

Title: Chairman/President

Name of Chief Paid Executive: Maher Matalka

Title: Managing Director

Date of Organization's Founding: 1995

Number of Members: 18 (13 pay dues)

Budget Size: 89,000 JD

In USD: \$125,500

SUMMARY OF KEY POINTS IN DIAGNOSTIC

Diagnostic Score: 74% as of 3/20/2002

Established in 1996, the Jordan Association of Manufacturers of Pharmaceuticals and Medical Appliances (JAPM) is sector specific association that represents one of the key sectors of the Jordanian economy. According to its literature, JAMP has voluntary members of almost all of the pharmaceutical companies in the country. Its members are export driven and are pledged to provide quality, safe and effective pharmaceuticals at affordable prices for Jordan and its export markets.

JAPM is regularly involved in the development of legislation and guidelines for its members and lobbies the Jordanian government on their behalf. It also works with both Jordanian and international associations in representing its members' interest. The association says it plays "an important consultative role in the nation's health-care system, working closely with the ministries of health to develop affordable products for pharmaceutical care and to increase Jordan's role in the global pharmaceutical market.

According to the charter, the association's objectives are to "develop the technical standards of the medicinal industry so as to produce high-quality products; coordinate and cooperate with the authorities to develop and maintain the technical standards of the medicinal industry."

JAPM has a small staff of four people headed by a very capable executive director, Maher Matalka. Since the universe of pharmaceutical manufacturers is small, all members are on the board of directors and participate fully in the association's decision making process. During the past year, one of JAPM's major activities has been directed at supporting the approval and implementation of the Jordan Free Trade Agreement with the United States. The association has been actively involved in that undertaking as well as other governmental policy changes that encourage the development of the export economy.

The association's strategic plan and the operational plan show that the organization has carefully selected issues of importance to Jordan and to its members. Housed in a modern office building, the organization's staff, consisting of four people, appears to be very competent; however, JAPM is understaffed. The day-to-day operations appear productive and efficient, utilizing adequate technology and management procedures, even though at times the workload is overwhelming causing stress.

Four areas of the association's activities can be improved: (1) the JAPM staff is not large enough to handle the workflow; (2) board member attendance can be better; (3) the communications and public relations efforts can be expanded; and (4) the association's membership can be expanded by having associate memberships for related businesses.

One major flaw—there has been very little forethought given to crisis management. In today's volatile world, it can be very hazardous for an organization not to be prepared

to handle the impact of sudden negative events. Several worst-case scenarios should be considered with reaction plans developed to ameliorate negative impacts of world events.

Overall, JAMP is a well-managed, small, but strong, business association with excellent potential for expansion in both membership and strength by providing necessary programs and services to its members and to the people of Jordan.

SPECIFIC RECOMMENDATIONS FOR JORDAN ASSOCIATION OF MANUFACTURERS OF PHARMACEUTICALS AND MEDICAL APPLIANCES

Organizational Leadership

1. The board and staff of JAPM need to draft a formal vision statement to determine where the organization should head in the next five to ten years.
2. All of the directors should move JAPM higher on their priority list to spend the necessary time and energy to properly participate and to carry out the fiduciary and leadership duties of the position of director.
3. The JAPM board and staff should establish a crisis management plan.
4. Chairman along with the executive director needs to develop formal orientation plan and materials for new board, new members, and new staff.
5. Contingency plans and a crisis management plan should be considered and adopted.

Programming

6. A formal written program of work would be useful to the organizational efficiency.

Financial

7. The board should establish an audit committee at board level.
8. A cost of service calculation should be made to determine the actual cost of servicing a member for one year.

Membership

9. A decision needs to be made of the proposal to add a new associate classification of membership.

Government Affairs

10. At some point in the future, JAPM needs to increase its intensity in attempting to change public policy on behalf of its members by increasing its research capabilities and by adding more professionals to its staff.

Technology

11. JAPM should consider upgrading its information technology.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Vision Statement 0
- Mission statement 10
- Bylaws and charter 10
- Membership needs assessment 10
- Comprehensive strategic plan 5

Findings

JAPM's mission statement and objectives are properly conceived, but no formal vision statement has been written. The organization's bylaws are current; however, changes are being proposed by the staff, including expanding the membership to include associate members.

Section Two

- Objectives 5
- Written Program of Work 0
- Performance Audit 0
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members on Results of Action Plans 5

Findings

A written formal Program of Work would be helpful.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 0
- Documentation of implementation of action plans 2.5

Findings

There are no formal or informal contingency plans in place to cover various scenarios.

Total Possible Points = 100

Total Points for Criterion

72.5

MAJOR CRITERION FINDING

JAPM's staff has a firm grip on the association's fundamental philosophy and the environment in which it operates. The board and the management have been able to keep focused on its mission.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Effective bylaws/constitution 10
- Commitment of officers to association (time & resources) 5
- Decision making capabilities and willingness of board 10
- Avoidance of micro-management by the board 10
- Volunteer officers' background / industry positions held by officers 10

Findings

The officers and directors of the association are very influential and prominent business CEOs with very busy schedules. Consequently, the activities of JAPM are not always at the top of the directors' priority list, thereby causing the board to be less than one-hundred-percent effective. While most of the board members spend the necessary time and resources to serve effectively as directors, a few apparently are not willing or are not able to commit the time necessary to fully meet their obligations of governing the associations' programs and events.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant education background 5
- Officer-orientation plan, training and association material 5
- Job descriptions for officers and directors 0
- Term limits of officers 5

Written job descriptions for both the directors and the staff often clarify the roles and responsibilities of the involved individuals; however, the executive director feels uncomfortable writing a job description for the CEO of a major member.

Section Three

- Staggered terms for officers 2.5
- Board culture 2.5
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic & project planning, brainstorming, & administrative meetings 2.5
- Attendance at board meetings 1.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 1

Findings

JAPM has the fundamental building blocks in place for a successful association.

Total Possible Points = 100

Total Points for Criterion 87.5

MAJOR CRITERION FINDING

Overall, JAPM's governing body is fundamentally sound and is positioned to serve its industry and the nation very well as the US/Jordan Free Trade Agreement is implemented and as Jordanian exports of pharmaceutical products expand markets.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)
 Total possible score for this Criterion is 100 points.

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 10
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 10

Findings

Without question, JAPM has developed a fundamentally sound organization. Because it did not have the advantages of the AMIR consulting services over the past four years, it does not necessarily conform to the normal association practices; however, with very little adjustment, JAPM could be brought up to AMIR standards in a very short time.

Section Two

- Published organizational chart 0
- Regular committee meetings 0
- Minutes of committee meetings 0
- Relationships between board and members 5
- Relationships between board and staff 5

Findings

With such a small membership, a committee approach to activities has not been used. The board and the staff have accomplished the association's work.

Section Three

- Number of standing committees 0
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 0
- Staff exposure to the board 2.5
- Documentation of committee structure 0
- Staff assignments to manage board functions & committees 2.5
- Committee orientation plan and materials 0
- Documentation of committee reports 0
- Analysis of committee chairs 0
- Lists of board and committee members 0
- Committee chair and member orientation materials 0

Findings

The unique size and the special purpose of the organization have dictated its structure.

Total Possible Points = 100 Total Points for Criterion 65

MAJOR CRITERION FINDING

On the whole, JAPM is adhering to the generally accepted management principles even though it is not conforming to the normal practices of most associations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of major focus of Program of Work 0
- Explanation of the Program of Work's super-ordinate goal 10
- Analysis of specific goals of Program of Work 0
- Identification of measurements of success 10
- Analysis of results of previous time period 10

Findings

JAPM's programs are designed to help its 18 members weave their way through both local and international rules and regulations governing their particular industry. The association appears to be successful in those efforts. A written program of work would be useful.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 2.5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 2.5

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 0
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 0
- Documentation of programs in bulletins 0
- Documentation of products and services 2.5

Findings

Because of the small number of members, the management has chosen a more personal approach to communications and program activities. That approach seems appropriate to accomplish the organization's goals.

Total Possible Points = 100

Total Points for Criterion

67.5

MAJOR CRITERION FINDING

JAPM's approach to programming is fundamentally sound. While there is always room for improvement, the current activities and programs fit well within the parameters established by the mission of the organization. All activities and programs seem to be directed at promoting the basic organizational philosophy and goals. Documentation of this effort will result in better communication.

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoint.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of professional staff 10
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 0
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 0
- Job description of executive staff 0

Findings

Headed by a very capable executive, the organization's personnel seem to be a very high caliber of people dedicated to carrying out the mission of the association; however, as is true in many small associations, JAPM has not documented its policies and procedures. Without a written vision statement, it is difficult to assess whether the board and the staff have the same or different visions for the organization.

Section Two

- Relevant experience of program staff 5
- Relevant experience of administrative staff 5
- Analysis of performance evaluation form 0
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 0
- Employee time sheet for programming records 0
- Job descriptions of programming staff 0
- Job descriptions of administrative staff 0
- Comparative salary analysis 0
- Performance bonus plan 0
- Staff retention rate 2.5
- Staff awareness of importance of programming and financial success of organization 2.5

Findings

While many normal personnel activities and procedures are conducted on a regular basis, JAPM's productivity could be improved with additional personnel techniques used by most successful associations. Time sheets should be implemented to make certain that staff costs are being charged to appropriate programming budgets.

Total Possible Points = 100

Total Points for Criterion 50

MAJOR CRITERION FINDING

Institutionalizing normal human resource policies and procedures would probably be productive for JAPM. The time and effort to carry out these processes should be carefully weighted against the benefits derived from such activities.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of the most recent financial reports 10
- Analysis of the current budget and link with strategic plan 5
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 10

Findings

The fundamentals of financial management have been implemented at JAPM along with transparency and efficiency in using the data for organizational planning.

Section Two

- Stability and diversification of level of funding (including non-dues income) 5
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 5
- Overhead, personnel, and program costs are segregated 5

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 0
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized. 0

Findings

An audit committee should be established at the board level. Also, an additional calculation would be useful to the decision making process: the calculation of the cost-of-service for members.

Total Possible Points = 100

Total Points for Criterion 90

MAJOR CRITERION FINDING

Proper accounting practices have been institutionalized at JAPM. Reports and financial safeguards seem to be in place and transparency of financial transactions is common practice. Regular external audits are conducted. JAPM appears to be on a sound financial footing.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer’s Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)
 Total possible score for this Criterion is 100 points.

Section One

- A central message answering question “what’s in it for me?” 10
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 10
- Membership directory 10

Findings

With an almost captive small market, JAPM fortunately does not have to spend a lot of association energy and resources looking for new members.

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 0

Findings

A retention tool used by most associations is a carefully designed new member orientation program to make certain a dues payer is really sold on the value of the organization. As the executives change or as new companies are formed and join JAPM, a member-orientation program should be considered.

Section Three

- Benefits of becoming an association member as opposed to listing only programs & activities 0
- Formal orientation session for new members 0
- Committee preference cards sent annually to members 0
- New members immediately invited to serve on a committee 0
- Analysis of membership application 0
- Set targets for number of members to be acquired 0
- Non-dues sources of income & strategy to promote discounted programs and services to members 0
- Orientation handout materials 0
- Certificates and awards 0
- Other volunteer recognition devices 0

Total Possible Points = 100 **Total Points for Criterion 70**

MAJOR CRITERION FINDING

JAPM is considering the possibility of adding associate members to its roles. This could boost the number of members considerably, but the board and management need to keep in mind this action could fundamentally change the nature of the entire organizational approach to association management.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of core communication message 10
- Comprehensiveness of the communication plan relative to the strategic plan 5
- Analysis of professional communication staff 10
- Analysis of key target audiences 0
- Analysis of communication feedback mechanisms (assessment & tracking) 0

Findings

JAPM's approach to communication is based more on direct personal communication with members as opposed to printed and electronic material.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 5
- Analysis of writing for readership 5
- Correctly selected communication media 5
- Frequency of communication campaign 5

Section Three

- Communication plan that covers all parts of strategic plan 0
- Analysis of newsletter 0
- Analysis of magazine 0
- Analysis of action bulletins 0
- Analysis of program brochures 2.5
- Analysis of news releases and media kit .25
- Analysis of Web site or Web sites 2.5
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

Though some communication media are being used, there does not seem to be a need for a broad-based public relations effort for JAPM. The staff is experiencing the normal frustrations with the public media and the lack of professionalism and understanding by the news reporters. Unfortunately this is not unique to Jordan.

Total Possible Points = 100 Total Points for Criterion 62.5

MAJOR CRITERION FINDING

Along with membership development, JAPM's communication effort is unique because of its size and specialization of its membership.

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of public policies that prohibit job creation 10
- Analysis of obstacles to overcome to achieve economic growth 10
- Analysis of business association's adopted government policy positions 10
- Professional capabilities of government affairs staff 10
- Analysis of issue briefs produced by the business association 10

Findings

JAPM has for many years been influencing public policy. It has had considerable success; however, the association needs to institutionalize its governmental affairs program by documenting its board's policies and utilizing issue briefs to educate its members.

Section Two

1. Establishment of public policy advocacy committee 5
2. Availability of staff to research legal and economic research on key issues 5
3. List of priority issues 5
4. Analysis of research reports produced or authorized 5
1. Analysis of reports to the board and the membership on government affairs activities 5

Findings

The board needs to approve and finance additions to the professional staff in governmental affairs or at least add administrative staff to allow the executive director to further develop his skills and contacts in that area of association management.

Section Three

- Analysis of business association's participation in anti-corruption program 0
- Analysis of government tax policies effect on business association's members 2.5
- Tracking proposals through the legislative process 2.5
- Testimony before public bodies on key issues 2.5
- Grass roots campaign efforts 2.5
- Coalition building efforts of association 2.5
- Understanding of the political dynamics of the nation 2.5
- Member education program on public policy 2.5
- Ability to build public support for government policy changes 2.5
- Ability to launch a letter writing campaign on key issues 2.5

Findings

Many advocacy techniques are available to associations, and JAPM needs to make certain that it is utilizing the best approaches for its national and international situation.

Total Possible Points = 100

Total Points 97.5

MAJOR CRITERION FINDING

JAPM has been relatively successful in public policy advocacy because it has selected key issues of interest to its members. Those members are major contributors to the gross national product; therefore, when JAPM speaks, the government listens.

CRITERION TEN: MANAGEMENT SYSTEMS -USE OF INFORMATION TECHNOLOGY

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of overall information technology systems to streamline activities (i.e. Microsoft Project for work plan, MS Outlook prompts, MS Access for database to generate mailing lists, labels, etc) 10
- Executive computer and technology philosophy 10
- Staff computer efficiency and technical capabilities 5
- Operational policies & procedures manuals 0
- Documentation of record-keeping activities 5

Finding

Documentation of operational policies and procedures needs to be developed at JAPM in the area of technology. Standards and procedures for each technology needs to be established and documented to institutionalize the organization's use of one of its most extensive investments.

- Availability and utilization of database software 5
- Analysis of Web site(s) 5
- Analysis of forms used in accordance with Operational Policies & Procedure manual 0
- Analysis of specific system hardware 5
- Utilization of e-business capacity 0

Finding

A new Web site is under construction. Other routine technology management approaches including e-business need to be adopted.

Section Three

- Study of e-mail utilization 2.5
- Analysis of written communications – business letters, brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 2.5
- Utilization of fax machine networks 2.5
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 2.5
- Assessment of desktop publishing capabilities 2.5
- Evidence of technology upgrade awareness 2.5
- Evidence of technology upgrade plans 2.5

Findings

JAPM should become a technology driven organization. Upgrades in software and hardware are in order and seeking new ways to utilize existing and future technology should always be on the management's agenda.

Total Possible Points = 100

Total Points for Criterion

70

MAJOR CRITERION FINDING

JAPM has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization; however, the staff efficiency would be increased

dramatically by upgrading its technology base and by using the latest electronic tools and techniques in communicating with its very high-powered membership.

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| SUMMARY SHEET FOR POINTS |
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| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 73 |
| Criterion Two: Governing Body, Officers, and Directors | Points 88 |
| Criterion Three: Organizational Structures | Points 65 |
| Criterion Four: Programs, Services, and Activities | Points 68 |
| Criterion Five: Association Staff | Points 50 |
| Criterion Six: Financial Planning and Reporting | Points 90 |
| Criterion Seven: Membership Development and Recruiting | Points 70 |
| Criterion Eight: Communications and Public Relations | Points 63 |
| Criterion Nine: Government Affairs | Point 98 |
| Criterion Ten: Management Systems & Information Technology | Points 70 |
| Total Criteria Points | 735 |

| |
|---|
| <p>FORMULA: Total Criteria Points divided by 1000 equals percentage score. $735/1000 = .735/100 = 74\%$</p> |
|---|

Jordan Association of Manufacturers of Pharmaceuticals and Medical Appliances

COMPARATIVE RATIO SCORE 74%

Certification Statement

Therefore, the Jordan Association of Manufacturers of Pharmaceuticals and Medical Appliances, a business association received a 74 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/20/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
JABA, THE AMERICAN CHAMBER OF COMMERCE IN JORDAN**

**BASIC FACTS ABOUT JABA
THE AMERICAN CHAMBER OF COMMERCE
IN JORDAN**

Business Association name: Jordan American Business Association /
Jordan American Chamber of Commerce (JABA)

Address: P.O. Box 840817

Telephone: 962 6 565 1860

Fax: 962 6 565 1862

Email: rbutros@jaba.org.jo

Web Site: www.jaba.org.jo and www.justrade.jo

Name of Chief Volunteer: Fawaz Shalan

Title: Chairman of the Board

Name of Chief Paid Executive: Raghda Butros

Title: Executive Director

Date of Organization's Founding: 1999

Number of Members

Budget Size: 247,032 JD

In USD: \$350,000

SUMMARY OF KEY POINTS

Diagnostic Score: 79% as of 3/4/2002

JABA, the American Chamber of Commerce in Jordan, is a not-for-profit business association whose mission is to be the dynamic force for the development of commerce and promotion of investment between Jordan and the United States of America. During the past year, JABA's major activity has been directed at supporting the approval and implementation of the Jordan Free Trade Agreement with the United States. This business association also has been a leader in providing numerous and varied business training venues for its members. JABA has and continues to play a leadership role in forming a coalition among business associations to promote the acceptance of the US/Jordan Free Trade Agreement.

The association has strong leadership at both the board and staff levels. The staff and the board have apparently been able to remain focused on the association's mission and has avoided the distraction of becoming all things to all people. The strategic plan and the operational plan have narrowed the association's activities to carefully selected issues of importance to Jordan. With the right vision and the right mission, the programming activities seem to be successful, according to the chairman and the executive director.

Housed in an attractive new facility, the organization's professional staff consists of nine people who appear to be very competent in their various fields of activities. Headed by a capable executive director, the day to day operations appear productive and efficient, utilizing adequate technology and management procedures. Indications show that there is adequate support for the association's activities by the member companies with a relatively low turnover rate in membership.

Because of changing circumstances, four areas of the association's activities need to be improved: (1) strategic and operational planning, (2) communication, (3) governmental affairs, and (4) organizational structure.

Though written documents for the strategic and operational plans outline the major activities, both need to be further expanded and improved with more detailed action steps including specific tasks with deadlines, resource allocations, and assigned responsibilities. Several major flaws appear in the communication plan.

There has been very little or no forethought given to crisis management communication when in today's volatile world, it can be very hazardous for an organization not to be prepared to handle the impact of sudden events that can effect the image and the programs of the association in the future. Several worst-case scenarios should be considered with reaction plans developed to ameliorate negative impacts.

While JABA has been involved in several public policy advocacy efforts, there appears to be a need to increase the sophistication and intensity of that element of the organization's efforts. As the US/Jordan Free Trade Agreement is implemented, more barriers to trade will become evident. Therefore, JABA needs to continue to be in the

forefront of advocating public policy changes to help create more jobs for Jordanians by expanding exports.

JABA's basic philosophy and objectives are properly conceived, the organization's current bylaws cause all board members, including the current chairman, to leave office on the same date, which is less than a desirable situation.

Overall, JABA appears to be a well-managed, strong business association with a bright future of providing necessary programs and services to its members.

SPECIFIC RECOMMENDATIONS FOR THE JORDANIAN AMERICAN BUSINESS ASSOCIATION

Organizational Philosophy

1. The JABA board and staff should establish a crisis management plan.
2. Membership needs to correct major and damaging flaw in bylaws and constitution relating to terms of directors.
3. Board and staff needs to develop a quantitative measurement of success.

Communications

4. Staff with board's input and approval needs to further develop the association's super-ordinate goal along with its core public relations message answering the question for members, "What's in it for me?"
5. Staff needs to revamp "media relations" strategy.

Government Affairs

6. Staff needs to utilize action bulletins for governmental affairs.
7. Staff should utilize issue briefs in governmental affairs program.
8. Staff needs to learn real governmental process for public policy advocacy.
9. Staff needs to prepare plan for utilizing grass roots letter writing campaigns.

Membership

10. Board and staff need to strengthen membership recruitment and retention plans and activities.
11. Members and staff need to spend more productive time and effort on membership retention.
12. Staff needs to publish current year membership directory.

Finances

13. Board needs to strengthen linkage between program of work and budget.
14. Staff needs to segregate overhead and programming costs from personnel costs allocated to various programs by using employee time sheets.
15. Chairman needs to establish an active audit committee at the board level.
16. Financial manager needs to develop a cost-of-service calculation for the amount of money spent each year on servicing members.

Leadership

17. Chairman along with the executive director needs to develop formal orientation plan and material for board, committee chair, new members, and staff.

Technology

18. Staff with help of a consultant needs to document policies and procedures in manual format for information technology of association.
19. Staff needs to complete software upgrades.
20. Staff needs to complete Web site upgrades.

Personnel

21. Executive director needs to work toward establishment of a Jordanian association executives association to establish a higher level of professional availability for personnel.
22. Board needs to use annual performance appraisal for executive director.
23. Executive director needs to build appropriate number of trained staff members and then to practice effective delegation techniques.

24. Executive director needs to utilize annual performance appraisals for employees.
25. Executive director needs to develop information technology expertise on staff.
26. Executive director needs to upgrade professional communication staff.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Vision Statement 10
- Mission statement 10
- Bylaws and charter 5
- Membership needs assessment 5
- Comprehensive strategic plan 2

Findings

While JABA's vision and mission statement and objectives are properly conceived and well-written, the organization's current bylaws are presenting a major problem. All board members, including the current chairman, leave office on the same date. There are no staggered terms for directors and the existing bylaws have term limits that will cause 100% turnover. This flaw will cause a loss of institutional memory and an over reliance and dependency on the staff for analysis of past events and activities. This is not an optimal situation. Also, even though the staff and directors seem to be aware of their members' desires, there is no formal needs-assessment mechanism in place to regularly and consistently track input.

Section Two

- Objectives 5
- Program of Work 5
- Performance Audit 5
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members on Results of Action Plans 5

Findings

The Program of Work for the year should be further refined with specific, measurable, and achievable goals that have estimated resource needs and set deadlines. More sophisticated planning methodologies need to be employed.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 1
- Documentation of implementation of action plans 2.5

Findings

While the leadership has verbalized a few organizational scenarios, there is no formal contingency plan in place to cover unexpected events.

Total Possible Points = 100

Total Criterion Points 80.5

CRITERION MAJOR FINDING

With the exceptions noted above in Findings, JABA volunteers and staff have a firm grip on its fundamental philosophy and have been able to keep focused on its primary mission.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Effective bylaws/constitution 5
- Commitment of officers to association (time & resources) 5
- Decision making capabilities and willingness of board 10
- Avoidance of micromanagement by the board 10
- Volunteer officers' background / industry positions held by officers 10

Findings

The current bylaws and constitution have served JABA well with the notable exception of staggered terms for the board leadership which will, in its current version, leave the association with a totally new group of leaders ever four years. As in many organizations, some directors are more committed than others and JABA is no exception. While most of the board members spend the necessary time and resources to serve effectively as directors, a few apparently are not willing or are not able to commit the time to be really effective directors. Also, from time to time, the board has had difficulty in arriving at timely and appropriate decisions on some critical issues

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant educational background 5
- Officer-orientation plan, training and association material 5
- Job descriptions for officers and directors 5
- Term limits of officers 3

Findings

As mentioned above, the term limits of officers, in JABA case, is a hindrance because of the lack of staggered terms. On the whole, there is a strong group of directors who understand their role in the association and have developed the necessary processes to conduct the fundamental business of JABA.

Section Three

- Staggered terms for officers 0
- Board culture 2
- Board procedures 2
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic planning, brainstorming, administrative, and project planning meetings 0
- Attendance at board meetings 2.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 2.5

Findings

In addition to the staggered terms dilemma, attendance at board meetings has been less than perfect, thereby limiting the broad-based representation that the directors are supposed to represent.

Total Possible Points = 100

Total Points for Criterion 82

CRITERION MAJOR FINDING

With the exceptions noted above in Findings, JABA's governing body is fundamentally sound and should serve the membership and the nation very well in the coming years.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 10
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 10

Findings

Without question, JABA has developed a fundamentally correct organizational structure.

Section Two

- Published organizational chart 0
- Regular committee meetings 2.5
- Minutes of committee meetings 5
- Relationships between board and members 5
- Relationships between board and staff 5

Findings

Two exceptions to JABA's excellent conduct of association business affairs: (1) the need to develop and publish an organizational chart that accurately illustrates in visual form the relationship between various elements of the organization; (2) some committees are not effective in carrying out their assigned tasks. To the organization's credit, many different methodologies for committee activation have been attempted, but limited success has been achieved in involving large numbers of members in regular committee activities.

Section Three

- Number of standing committees 2.5
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 2.5
- Staff exposure to the board 1
- Documentation of committee structure 2.5
- Staff assignments to manage board functions & committees 2.5
- Committee orientation plan and materials 2.5
- Documentation of committee reports 2.5
- Analysis of committee chairs 1
- Lists of board and committee members 2.5
- Committee chair and member orientation materials 2.5

Findings

There apparently is very limited staff exposure to the board of directors. The executive director carries on most board activities. Some consideration should be given to allowing other staff members to interact on a routine basis with the board in order to gain additional motivation and mutual respect for the professionalism of the entire staff.

Total Possible Points = 100

Total Points for Criterion 89.5

CRITERION MAJOR FINDING

On the whole, JABA is adhering to the generally accepted management principles for similar business associations in other nations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's superordinate goal 10
- Analysis of specific goals of Program of Work 10
- Identification of measurements of success 10
- Analysis of results of previous time period 5

Findings

JABA has an impressive array of programs and services; however, there is a definite lack of comprehensive analysis of past activities. Both the board and the staff seems to forge on to the next set of challenges without careful analyses of past successes and past failures in programming. A more scientific and comprehensive management approach to analyzing the reasons for past results should be undertaken.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 5

Findings

While additional work on the strategic and operational plans need to be undertaken, JABA has been approaching its activities over the past years by employing realistic goal-setting procedures. Though achieving acceptable results, the percentage of goal achievement can be improved with more sophisticated planning techniques.

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 2.5
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

JABA is carrying out fundamentally sound administrative strategies that are appropriate for explaining the organization's programs and activities to its members and to the general public. Additional communications strategies will be discussed under Criterion Eight

Total Possible Points = 100

Total Points for Criterion 95

CRITERION MAJOR FINDING

JABA's approach to programming is fundamentally sound. While there is always room for improvement, the current activities and programs fit well within the parameters established by the vision and mission of

the organization. All activities and programs seem to be directed at promoting the basic organizational philosophy and goals.

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of professional staff 10
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 10
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 0
- Job description of executive staff 10

Findings

As have many associations, JABA has placed on the “back burner” the documentation of personnel policies and procedures. The executive director has a good grasp of staffing and human resource requirements, however, because of perceived higher priorities, recording of such policies and procedures has been delayed. Now that it has moved from an embryonic stage to a more sophisticated level in its organizational life cycle, JABA needs to formalize, professionalize, and institutionalize its personnel documentation.

Section Two

- Relevant experience of program staff 2
- Relevant experience of administrative staff 3
- Analysis of performance evaluation form 0
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Findings

Because of a limited pool of experienced job seekers, JABA has been hampered by the lack of experience of its personnel in the normal skills needed. On the job training has been a necessity for personnel. While competent and well-motivated people have been hired, the lack of experience in associations has caused some delays in achieving the type of results that could have been achieved had experienced personnel been available. Additional skills training is a continuing challenge that JABA is attempting to meet.

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 0
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 2
- Performance bonus plan 2.5
- Staff retention rate 1.5
- Staff awareness of importance of programming and financial success of organization 2.5

Findings

While many normal personnel activities are conducted on a regular basis, JABA's productivity could be improved with a few additional personnel techniques. Time sheets should be implemented to make certain that staff costs are being charged to appropriate programming budgets.

Total Possible Points = 100 **Total Points for Criterion** **76**

MAJOR CRITERION FINDING

JABA should judiciously invest in its people, providing training, motivation, and compensation that will encourage long-term employment.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of the most recent financial reports 10
- Analysis of the current budget and link with strategic plan 5
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 8

Findings

JABA does not utilize to its fullest extent the linkage between the organization's strategic planning process and the budgeting process. A reordering of the two processes should be considered: the needs of the members assessed; strategies and action plans developed to meet those needs; estimates made on the costs of proposed plans; then revenue attainment plans developed to accomplish the newly created plans.

Section Two

- Stability and diversification of level of funding (including non-dues income) 5
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 5
- Overhead, personnel, and program costs are segregated 3

Findings

A more detailed analysis of overhead costs allocated to specific programming costs should be established. In particular, personnel time spent on various programs should be allocated to specific programs, projects, or services where practical in order to account for the "real" cost of such programs. JABA cannot actually calculate its programming costs at the present time because it does not segregate its various costs. Currently reported profits or losses have little meaning with such allocations of personnel, overhead, and programming costs.

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 2.5
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized. 0

Findings

The fundamentals for proper financial management are in place.

Total Possible Points = 100

Total Points for Criterion

88.5

MAJOR CRITERION FINDING

Proper accounting practices have been institutionalized at JABA. Reports and financial safeguards seem to be in place and transparency of financial transactions are common practice. Regular external audits are conducted. JABA appears to be on a sound financial footing.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Central message answering question "what's in it for me?" 5
- Documentation of membership list 5
- Analysis of membership brochure 8
- Total number of current members & retention rate 10
- Membership directory 0

Findings

While JABA has been able to attract new members and retain existing members, a better-organized effort can be undertaken to reach maximum market penetration. A central membership message along with allied membership tools and publications including a membership directory should be developed.

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 5
- Estimate of the total number of potential members 2.5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 3

Findings

A key to recruitment is establishing a realistic assessment of the potential market. The staff needs to determine what the real potential for membership is before establishing long-term goals. Unrealistic estimates can lead the board to make inappropriate decisions. A good method to retain members is a carefully designed new member orientation program to make certain a dues payer is really sold on value.

Section Three

- List the benefits of becoming a member as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 0
- Committee preference cards sent annually to members 2.5
- New members immediately invited to serve on a committee 2.5
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 2.5
- Non-dues income & strategy to promote members discounts 2.5
- Orientation handout materials 2.5
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Findings

While some fundamental membership devices are in place, JABA could improve its recruitment and retention rate considerably by utilizing more professional techniques that have proved to work elsewhere.

Total Possible Points = 100

Total Points for Criterion 71

MAJOR CRITERION FINDING

It is not the lack of effort that has caused JABA to receive less support from members than it could have. It is the lack of a good marketing approach. The writing of membership recruitment letters has developed into a highly skilled profession. Graphics and text are very important in sparking interest. It is an established fact that a potential member must come to the conclusion that an association offers something of real value before a payment for dues will be made. JABA needs to become more sophisticated in the recruitment and retention arena. The staff should research, plan, adopt, and use the best techniques that have been developed by other associations and organizations.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of core communication message 5
- Comprehensiveness of the communication plan relative to the strategic plan 10
- Analysis of professional communication staff 0
- Analysis of key target audiences 2
- Analysis of communication feedback mechanisms (assessment & tracking) 8

Findings

JABA's approach to communicating its message has obviously been effective; however, it could have been much more effective by several magnitudes had sophisticated techniques and skills been used. This is the major weakness of the organization and improvements can be easily attained if this function of the association is prioritized and highly regarded by the leadership and sufficient funds are spent. Also there must be professional communicators on the staff to have the type of effort that JABA deserves. While past efforts are admirable, the next level of professional communications needs to be achieved

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 2
- Analysis of writing for readership 5
- Correctly selected communication media 5
- Frequency of communication campaign 5

Findings

In addition to techniques and skills, sufficient communication research using surveys, focus groups, and feedback mechanisms need to be employed.

Section Three

- Communication plan that covers all parts of strategic plan 2.5
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 0
- Analysis of program brochures 2.5
- Analysis of news releases and media kit 2.5
- Analysis of Web site or Web sites 1
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

Though some communication media are being used, there does not seem to be an underlying logic or approach to selecting target audiences and matching communication channels to reach those audiences. A well thought out approach using the proper media for each selected targeted audience needs to be implemented.

Total Possible Points = 100

Total Points for Criterion 63

MAJOR CRITERION FINDING

Membership development and communications are the weak links in the organizational structure for JABA. More time, money, manpower, and brainpower should be used in concentrating on how is it best to "tell JABA's story."

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- | | | |
|--|----|---|
| • Analysis of public policies that prohibit job creation | 10 | |
| • Analysis of obstacles to overcome to achieve economic growth | 10 | |
| • Analysis of business association's adopted government policy positions | | 0 |
| • Professional capabilities of government affairs staff | 10 | |
| • Analysis of issue briefs produced by the business association | | 0 |

Findings

JABA is doing an effective job of advocating changes in public policy, but it is not documenting its approaches or achievements. Without board policy positions and without properly researched issue briefs for business and political decision-makers, JABA is limiting its successes by what it is not doing rather than by what it is doing.

Section Two

- | | | |
|--|-----|---|
| • Establishment of public policy advocacy committee | 5 | |
| • Availability of staff to research legal and economic issues. | 2.5 | |
| • List of priority issues | | 5 |
| • Analysis of research reports produced or authorized | 2.5 | |
| • Analysis of reports to the board and the membership on government affairs activities | | 5 |

Findings

The fundamental for success in public policy advocacy are in place at JABA.

Section Three

- | | | |
|--|-----|-----|
| • Analysis of business association's participation in anti-corruption program | 0 | |
| • Analysis of government tax policies effect on business association's members | | 2.5 |
| • Tracking proposals through the legislative process | 0 | |
| • Testimony before public bodies on key issues | 0 | |
| • Grass roots campaign efforts | 0 | |
| • Coalition building efforts of association | 2.5 | |
| • Understanding of the political dynamics of the nation | 2.5 | |
| • Member education program on public policy | 0 | |
| • Ability to build public support for government policy changes | | 2.5 |
| • Ability to launch a letter writing campaign on key issues | 2.5 | |

Findings

Many advocacy techniques are available to associations and JABA needs to make certain that it is utilizing the best approaches for its situation. There is little evidence that the wide variety of available techniques has been explored.

Total Possible Points = 100

Total Criterion Points

62.5

MAJOR CRITERION FINDING

JABA has been successful in the governmental affairs arena because it has selected the right issues and the right positions on those issues. That approach can be successful in the short term, but for an association to be successful long-term, it must utilize the best techniques in addition to its issue selection process. JABA needs to concentrate on improving its advocacy methodologies.

CRITERION TEN: MANAGEMENT SYSTEMS AND USE OF INFORMATION TECHNOLOGY

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of overall information technology systems to streamline activities (i.e. using Microsoft Project for the work plan, using MS Outlook prompts, using MS Access for a member database to generate mailing lists, labels, etc) 10
- Executive computer and technology philosophy 10
- Staff computer efficiency and technical capabilities 10
- Operational policies & procedures manuals 0
- Documentation of record-keeping activities 10

Finding

Documentation of operational policies and procedures needs to be developed at JABA in the area of technology. Standards and procedures for each technology needs to be established and documented in order to institutionalize the organization's use of one of its most expensive investments.

Section Two

- Availability and utilization of database software 2.5
- Analysis of Web site(s) 0
- Analysis of forms used in accordance with Operational Policies & Procedure manual 0
- Analysis of specific system hardware 5
- Utilization of e-business capacity 5

Finding

One Web site has been completed (www.justrade.jo) and another site is under construction. Other routine technology management approaches need to be adopted.

Section Three

- Study of e-mail utilization 2.5
- Analysis of written communications – business letters, brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 2.5
- Utilization of fax machine networks 0
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 2.5
- Assessment of desktop publishing capabilities 2.5
- Evidence of technology upgrade awareness 2.5
- Evidence of technology upgrade plans 2.5

Findings

JABA is a technology driven organization. Upgrades are always in order and seeking new ways to utilize existing and future technology should always be on the management's agenda.

Total Possible Points = 100

Total Points for Criterion 75

MAJOR CRITERION FINDING

JABA has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization. It needs to leverage that available capacity to its fullest extent to meet major objectives.

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|---------------------------------|
| SUMMARY SHEET FOR POINTS |
|---------------------------------|

| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 81 |
| Criterion Two: Governing Body, Officers, and Directors | Points 82 |
| Criterion Three: Organizational Structures | Points 90 |
| Criterion Four: Programs, Services, and Activities | Points 95 |
| Criterion Five: Association Staff | Points 76 |
| Criterion Six: Financial Planning and Reporting | Points 89 |
| Criterion Seven: Membership Development and Recruiting | Points 71 |
| Criterion Eight: Communications and Public Relations | Points 63 |
| Criterion Nine: Government Affairs | Points 63 |
| Criterion Ten: Management Systems & Information Technology | Points 75 |
| Total Criteria Points | 785 |

| |
|--|
| <p>FORMULA: Total Criteria Points divided by 1000 equals percentage score. $78/1000 = .785/100 = 79\%$</p> |
|--|

Jordan American Business Association

COMPARATIVE RATIO SCORE 79%

Certification Statement

Therefore, the Jordanian American Business Association, a business association received a 79 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/1/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
THE INFORMATION TECHNOLOGY ASSOCIATION OF JORDAN
INT@J**

**BASIC FACTS ABOUT
THE INFORMATION TECHNOLOGY ASSOCIATION-JORDAN -
Int@j**

Business Association name: Int@j – Information Technology Association-Jordan

Address: P.O. Box 182756

Telephone: 962 6 593 0123

Fax: 962 6 593 1476

Email: info@intaj.net

Web Site: www.intaj.net

Name of Chief Volunteer: Karim Kawar

Title: Chairman

Name of Chief Paid Executive: Ra'ed Bilbessi

Title: Chief Executive Officer

Date of Organization's Founding: 2000

Number of Members: 242

Budget Size: 55,593 JD

In USD: \$78,000

SUMMARY OF KEY POINTS

Diagnostic Score: 97% as of 3/28/2002

The Information Technology Association of Jordan, known as Int@j, is a voluntary non-profit, private organization whose mission is to represent, promote, and advance the software and information technology services industry in Jordan and in the global market.

Int@j's major aim is to be the information technology association that is the focal point for all Jordanian IT industry-related activities. The organization's literature declares that it is open to all value-added information technology-related, software development and support enterprises.

The association's objectives are: 1) to represent the information technology industry interests and lobby with governmental and international groups by proposing national initiatives and conducting public relations efforts; 2) to promote industry investment opportunities in Jordan by promoting Venture Capital (VC) and Initial Public Offerings (IPOs); forming relationships with local export-oriented groups; representing the industry at conferences and trade shows; setting up databases and publicize membership through Web sites, newsletters, hyperlinks, promotional materials and advertising; and 3) to provide industry research and market information; to effect standardization, certification and quality control; to support human resource development; to advance industry intellectual property rights; to form international IT industry alliances and to manage industry stakeholder relations and resolve industry conflicts.

The association has a wide variety of activities to achieve its objectives including the USAID-funded REACH Initiatives I and II. Housed in a modern office complex that also is the address of many of the major information technology firms in Jordan, Int@j is headed by a very strong board of directors and staff. Karim Kawar is an industry leader as well as the association's chairman. Ra'ed Bilbessi, the Chief Executive Officer, is an outstanding association manager with several years of experience. An enthusiastic "super-salesman" for the IT industry, Mr. Bilbessi is having a major impact on the development of Jordan.

The management of Int@j has taken advantage of the assistance from the business association specialists of AMIR, in particular the help of Mr. Zaki Ayoubi and Mr. Bob Ash. The board and the staff designed this organization using the best-practices approach, rather than the trial and error method most other Jordanian associations have used.

Areas of improvement for Int@j include minor changes in (1) governance and (2) communications with a major flaw in not having a crisis management plan.

With a membership of 110 dues-paying companies, a budget of 375,000 JD, outstanding volunteer leadership, and an excellent staff of seven competent professionals, Int@j has become a model organization for Jordanian associations.

| |
|---|
| SPECIFIC RECOMMENDATIONS FOR Int@j |
|---|

Organizational Leadership

1. A formal agreed-upon vision statement needs to be adopted.
2. Attendance at board meetings should be improved.
3. A crisis management plan should be put into place.

Personnel

4. Stress management programs and changes in the high-pressure culture of the association need to be implemented to avoid staff burnout.

Communication

5. A copy block should be added in all publications giving the organization's name, address, and phone numbers. Also a listing of staff and directors should be in the newsletters and other publications when appropriate.
6. A more moderate approach to communications might be considered and found to be equally effective.

Organizational Structure

7. A new association law is needed for Jordan and Int@j should lead the lobbying effort to affect that change.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Vision Statement 5
- Mission statement 10
- Bylaws and charter 10
- Membership needs assessment 10
- Comprehensive strategic plan 10

Findings

Int@j's leaders and staff are able to eloquently verbalize the vision for their organization's future; however, they do not have an agreed-upon written vision statement.

Section Two

- Objectives 5
- Program of Work/Action Plan/Operating Plan 5
- Performance Audit 5
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members 5

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 2.5
- Documentation of implementation of action plans 2.5

Findings

There are no formal or informal contingency plans in place to cover various scenarios.

Total Possible Points = 100

Total Points for Criterion 95

MAJOR CRITERION FINDING

Int@j volunteers and staff appear to have a well-established philosophy for the association with a clear mission, objectives and operating plans to achieve the maximum effectiveness for its members.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Effective bylaws/constitution 10
- Commitment of officers to association (time & resources) 10
- Decision making capabilities and willingness of board 10
- Avoidance of micro-management by the board 10
- Volunteer officers' background / industry positions held by officers 10

Findings

All the fundamentals for proper governance of an association are in place at Int@j.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant education background 5
- Officer-orientation plan, training and association material 5
- Job descriptions for officers and directors 5
- Term limits of officers 5

Section Three

- Staggered terms for officers 0
- Board culture 2.5
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic and project planning, brainstorming, and administrative meetings 2.5
- Attendance at board meetings 1.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 2.5

Findings

The association does not have staggered terms for its directors and this could cause disruptive turnover in leadership. A very outmoded national association law that needs to be revised causes this problem. Attendance at board meetings could be better.

Total Possible Points = 100

Total Points for Criterion 96.5

MAJOR CRITERION FINDING

With a few minor exceptions, Int@j's governing body is fundamentally sound and is positioned to serve its members and the nation very well.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 10
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 10

Findings

The association's organizational structure is fundamentally sound.

Section Two

- Published organizational chart 5
- Regular committee meetings 5
- Minutes of committee meetings 5
- Relationships between board and members 5
- Relationships between board and staff 5

Section Three

- Number of standing committees 2.5
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 2.5
- Staff exposure to the board 2.5
- Documentation of committee structure 2.5
- Staff assignments to manage board functions & committees 2.5
- Committee orientation plan and materials 2.5
- Documentation of committee reports 2.5
- Analysis of committee chairs 2.5
- Lists of board and committee members 2.5
- Committee chair and member-orientation materials 2.5

Total Possible Points = 100

Total Points for Criterion 100

MAJOR CRITERION FINDING

Int@j is adhering to and exceeding the generally accepted management principles for similar business associations in other nations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's super-ordinate goal 0
- Analysis of specific goals of Program of Work 10
- Identification of measurements of success 10
- Analysis of results of previous time period 10

Findings

Int@j programs and services appear to be carrying out the association's mission.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 5

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 2.5
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

Int@j is carrying out fundamentally sound administrative strategies that are appropriate for producing desirable results for the organization's members and for the general public.

Total Possible Points = 100

Total Points for Criterion 100

MAJOR CRITERION FINDING

Int@j's approach to programming is "according to the book." The current activities and programs fit well within the parameters established by the mission of the organization. This association appears to be "not only doing things right, but also doing the right things."

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of professional staff 10
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 10
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 10
- Job description of executive staff 10

Findings

With an excellent education and background, the Int@j's CEO Ra'ed Bilbessi is a capable manager whose experience, knowledge, and enthusiasm is a very valuable asset for the Kingdom of Jordan. He is a technophile as well as a competent association executive. The only caution is that Mr. Bilbessi, like other Jordanian association managers, are under a great deal of high-level stress and face a possible burnout situation. The board of directors should attempt to create a less stressful culture in this association. Such an atmosphere will cause untimely staff turnover that could damage the long-range effectiveness of the organization.

Section Two

- Relevant experience of program staff 5
- Relevant experience of administrative staff 5
- Analysis of performance evaluation form 5
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 0
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 2.5
- Performance bonus plan 2.5
- Staff retention rate 2.5
- Staff awareness of importance of programming and financial success of organization 2.5

Total Possible Points = 100

Total Points for Criterion 97.5

MAJOR CRITERION FINDING

The competency of the seven staff members at the Int@j is apparent. The day-to-day operations of the association are in good hands. The board of directors should consider ways to reduce the amount of staff stress that is very apparent to a causal observer.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of the most recent financial reports 10
- Analysis of the current budget and link with strategic plan 10
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 10

Findings

The fundamentals of financial management have been implemented at Int@j. The proper use of the financial data for planning purposes is evident.

Section Two

- Stability and diversification of level of funding (including non-dues income) 5
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 5
- Overhead, personnel, and program costs are segregated 5

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 2.5
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized. 0

Findings

An additional calculation would be useful to the decision making process—the calculation of the cost-of-service for members. The key question is “What does it cost Int@j to have a member on the rolls?” The expenses of mailings, printing, staffing, etc, should be part of an overall cost-of-service estimate that will allow the executive manager to determine if each new member is adding profits to the association’s revenues.

Total Possible Points = 100

Total Points for Criterion

97.5

MAJOR CRITERION FINDING

Int@j is a properly financed organization with excellent accounting and operating procedures that will serve its members well in the years to come.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Central message answering question "what's in it for me?" 10
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 10
- Membership directory 10

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 5

Section Three

- List the member benefits as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 2.5
- Committee preference cards sent annually to members 2.5
- New members immediately invited to serve on a committee 2.5
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 2.5
- Non-dues sources of income & strategy to promote discounted programs, products and services to members 2.5
- Orientation handout materials 2.5
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Total Possible Points = 100

Total Points for Criterion 100

MAJOR CRITERION FINDING

Int@j is using the best techniques that have been developed by other associations and organizations for attracting new members. This effort is never-ending.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of core communication message 10
- Comprehensiveness of the communication plan relative to the strategic plan 5
- Analysis of professional communication staff 10
- Analysis of key target audiences 10
- Analysis of communication feedback mechanisms (assessment & tracking) 10

Findings

While Int@j is doing an excellent job in overall communication, there is a believability factor that needs to be considered. When touting the achievements and the effectiveness of an organization, the literature and the verbal presentations seem to be “so good” that a certain amount of skepticism begins to creep into the mind of the audience. Perhaps a more moderate approach to communications might be more effective.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 5
- Analysis of writing for readership 5
- Correctly selected communication media 5
- Frequency of communication campaign 5

Section Three

- Communication plan that covers all parts of strategic plan 2.5
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 2.5
- Analysis of program brochures 1.5
- Analysis of news releases and media kit .25
- Analysis of Web site or Web sites 0
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

Some of Int@j's printed pieces need to have a copy block with the listing of directors, staff, and the organization's addresses including the office telephone number and the Web site URL. A crisis management plan needs to be developed.

Total Possible Points = 100 Total Points for Criterion 86.5

MAJOR CRITERION FINDING

The association has become very professional and effective in its communication efforts to “tell Int@j's story.” The only caution is to guard against over-enthusiasm that can cause skepticism.

| |
|---|
| CRITERION NINE: GOVERNMENT AFFAIRS |
|---|

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- | | | |
|--|----|----|
| • Analysis of public policies that prohibit job creation | 10 | |
| • Analysis of obstacles to overcome to achieve economic growth | 10 | |
| • Analysis of business association's adopted government policy positions | | 10 |
| • Professional capabilities of government affairs staff | 10 | |
| • Analysis of issue briefs produced by the business association | 10 | |

Findings

INT@J's core value is public policy advocacy. It is its reason for existence.

Section Two

- | | | |
|--|---|---|
| • Establishment of public policy advocacy committee | 5 | |
| • Availability of staff to research legal and economic issues. | 5 | |
| • List of priority issues | | 5 |
| • Analysis of research reports produced or authorized | 5 | |
| • Analysis of reports to the board and the membership on government affairs activities | 5 | |

Section Three

- | | | |
|--|-----|-----|
| • Analysis of business association's participation in anti-corruption program | 2.5 | |
| • Analysis of government tax policies effect on business association's members | | 2.5 |
| • Tracking proposals through the legislative process | 2.5 | |
| • Testimony before public bodies on key issues | 2.5 | |
| • Grass roots campaign efforts | 0 | |
| • Coalition building efforts of association | 2.5 | |
| • Understanding of the political dynamics of the nation | 2.5 | |
| • Member education program on public policy | 2.5 | |
| • Ability to build public support for government policy changes | | 2.5 |
| • Ability to launch a letter writing campaign on key issues | 2.5 | |

Findings

Many advocacy techniques are available to associations and Int@j is taking advantage of those appropriate for its given situation.

Total Possible Points = 100 Total Points 97.5

MAJOR CRITERION FINDING

Int@j has been successful in public policy advocacy because it has selected some key issues and has wisely used the contacts of its politically connected members. With its management of the REACH Initiatives I and II, the association has developed an excellent reputation for effectiveness in public policy advocacy.

SUMMARY SHEET FOR POINTS

| | |
|---|-------------------|
| Criterion One: Mission, Objectives, and Documents | Points 95 |
| Criterion Two: Governing Body, Officers, and Directors | Points 97 |
| Criterion Three: Organizational Structures | Points 100 |
| Criterion Four: Programs, Services, and Activities | Points 100 |
| Criterion Five: Association Staff | Points 98 |
| Criterion Six: Financial Planning and Reporting | Points 98 |
| Criterion Seven: Membership Development and Recruiting | Points 100 |
| Criterion Eight: Communications and Public Relations | Points 87 |
| Criterion Nine: Government Affairs | Point 98 |
| Criterion Ten: Management Systems & Information Technology | Points 100 |
| Total Criteria Points | 973 |

FORMULA:
Total Criteria Points divided by 1000 equals
percentage score. $973/1000 = .973/100 = 97\%$

Int@j Information Technology Association

COMPARATIVE RATIO SCORE 97%

Certification Statement

Therefore, Information Technology Association (Int@j), a business association received a 97 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/28/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
AMMAN BUSINESS AND PROFESSIONAL WOMEN'S ASSOCIATION**

**BASIC FACTS ABOUT
AMMAN BUSINESS & PROFESSIONAL
WOMEN'S ASSOCIATION**

Business Association name: Amman Business & Professional Women's Association

Address: 910415

Telephone: 962 6 5511647

Fax: 962 6 5530092

Email: bwpa@nets.com.jo

Web Site: www.bpwa.org.jo

Name of Chief Volunteer: Wijdan Al Saket

Title: President

Name of Chief Paid Executive: Shireen Nasser

Title: Executive Director

Date of Organization's Founding: 1976

Number of Members: 242

Budget Size: 55,593 JD

In USD: \$78,000

SUMMARY OF KEY POINTS

Diagnostic Score: 65% as of 3/5/2002

The Amman Business & Professional Women's Association, formerly known as the Business and Professional Women's Club, is a not-for-profit business association whose mission is "to provide a platform for constructive dialog and action that optimizes every opportunity for women in Jordan to insure empowerment and active participation in the social, business and economic development of the country through education, advocacy, networking, training, and professional support." It is the only Jordanian women's business association.

BPWA's activities include operating the Women Enterprise Center, the Legal Counseling Center, the Information and Documentation Center and the association's Training Unit.

BPWA's objectives are:

- (1) to spread education and legal knowledge among women in order to inform them of the rights and obligations set forth in different rules and regulations and the ways to obtain their rights and perform those obligations;
- (2) to extend individual legal advice to women and to handle each case separately;
- (3) to amend the legal context available to women and their existence as mothers, wives, businesswomen and active members in the society to which they belong;
- (4) to follow and pursue the problems that affect women personally and endeavor to care for these problems; and
- (5) to achieve Gender Equity in institutions and organizations.

The leadership is dedicated to the organization's purpose and is actively attempting to improve the operations of the group. The new executive director, Shireen Nasser, appears to be very competent. She is busy learning the basics of her association, the personalities of her leaders, and the nuances of her new job. The fundamental management principles are in place for the operation of a successful association.

The association claims to have increased its membership from 260 in 1998 to 381 in 2001; however, active membership (those who have paid dues) has decreased from 257 in 1998 to 242 in 2001. The potential membership for women business people in Amman is in the thousands. Obviously, the BPWA's present membership strategies are not working.

The association's strategic plan shows that the organization has selected issues of importance to Jordan and to its members, however, the concentration on under-privileged women is keeping the organization from serving the many of the business needs of its members. While such activities in the nation are extremely important and necessary, the charity aspect of the association's activity should be separated from the business aspects.

Housed in a nice office building, the organization's staff consists of 11 people who appear to be very competent in their various fields of activities.

Four areas of the association's activities can be improved:

- (1) The BPWA governing body needs to avoid micro-managing the staff;
- (2) The membership development program needs to be more aggressive with more services and programs of real value offered;
- (3) The communications and public relations efforts should become more sophisticated in telling the organization's story; and
- (4) The association's legal endeavors should be directed at business activities, not charity.

A major disagreement over the approach to the National Federation of Business and Professional Women should be resolved between President Al Saket and the Federation leaders Hind Al Jabbar and Senator Subhia al Maani. With a positive attitude toward cooperating with the Amman group and the National Federation, as well as other Jordanian associations, BPWA can consolidate its position of leadership within the business community.

If past animosities can be laid aside and if an appropriate strategic plan is developed and implemented, the BPWA can be a major force in the improvement of the Jordanian economy by empowering more women in business.

SPECIFIC RECOMMENDATIONS FOR AMMAN BUSINESS & PROFESSIONAL WOMEN'S ASSOCIATION

Organizational Leadership

- The current mission and vision statements need to be clarified and rewritten.
- The organization needs to settle on an official name. Several variations are presently being used.
- A needs assessment for the Amman association should to be undertaken.
- A revision and clarification of the bylaws should be considered.
- The board should avoid micro-managing the staff.
- The board should restructure the organization clarifying the lines of authority and making the entire staff report to the executive director.

Financial

- The board should establish an audit committee.
- The board should consider redirecting funding and emphasis on charity legal cases to business related legal cases.

Communications

- Staff needs to move to the next level of communication sophistication by developing further a plan to carefully identify BPWA's target audiences and to select the appropriate media to "speak to" those audiences.
- The staff needs to develop mechanisms to "listen carefully" to its members and the general public.
- The staff should solicit professional communication assistance and possibly hire a staff expert in public relations.

Membership

- The board and staff need to strengthen membership recruitment and retention plans and activities.
- Members and staff need to spend more productive time and effort on membership retention.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Vision Statement 0
- Mission statement 5
- Bylaws and charter 5
- Membership needs assessment 5
- Comprehensive strategic plan 5

Findings

BPWA's vision and mission statement and objectives need to be rewritten with clarity, conciseness, and relevance to the organization's present-day operations and mission.

Section Two

- Objectives 5
- Program of Work/Action Plan/Operating Plan 5
- Performance Audit 0
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members 2.5

Findings

A performance audit would be useful to the management of the association.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 0
- Documentation of implementation of action plans 2.5

Findings

There are no formal or informal contingency plans in place to cover various scenarios.

Total Possible Points = 100

Total Points for Criterion 60

MAJOR CRITERION FINDING

BPWA volunteers and staff need to make certain its fundamental philosophy is articulated fully and properly. The board and the management need to keep focused on its mission of helping improve the livelihood of the business and professional women in Jordan.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Effective bylaws/constitution 5
- Commitment of officers to association (time & resources) 10
- Decision making capabilities and willingness of board 5
- Avoidance of micro-management by the board 0
- Volunteer officers' background / industry positions held by officers 10

Findings

According to the executive director, there are some parts of the bylaws that she believes needs to be revised. Past history of the organization indicates that the board has a tendency to micro-manage the staff.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant education background 5
- Officer-orientation plan, training and association material 0
- Job descriptions for officers and directors 5
- Term limits of officers 5

Findings

An extensive orientation program for new association members, new board members, and new staff should be developed and used.

Section Three

- Staggered terms for officers 0
- Board culture 0
- Board procedures 2
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 1.5
- Proper agendas for strategic and project planning, brainstorming, and administrative meetings 2.5
- Attendance at board meetings 1.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 1

Findings

Though a strong element of teamwork is present on the board, a more professional culture of being policy makers as opposed to managers might be beneficial to the association.

Total Possible Points = 100

Total Points for Criterion 66

MAJOR CRITERION FINDING

With a few exceptions, BPWA's governing body is fundamentally sound and is positioned to serve its members and the nation very well.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 5
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 5
- Well-defined decision-making process 5

Findings

A major organizational structure flaw is the method that certain department heads report to a board member or a committee of directors rather than to the executive director. This flaw will cause continued turnover and conflicts at the staff level.

Section Two

- Published organizational chart 2.5
- Regular committee meetings 5
- Minutes of committee meetings 5
- Relationships between board and members 5
- Relationships between board and staff 5

Findings

While the organizational chart is drawn accurately, the structure itself is flawed from a line of authority viewpoint.

Section Three

- Number of standing committees 1
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 1
- Staff exposure to the board 2.5
- Documentation of committee structure 2
- Staff assignments to manage board functions & committees 0
- Committee orientation plan and materials 0
- Documentation of committee reports 1.5
- Analysis of committee chairs 1.5
- Lists of board and committee members 2.5
- Committee chair and member orientation materials 0

Findings

There are too many committees for the size of staff and the board.

Total Possible Points = 100

Total Points for Criterion

69.5

MAJOR CRITERION FINDING

With the noted exceptions, BPWA is adhering to the generally accepted management principles for similar business associations in other nations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's super-ordinate goal 0
- Analysis of specific goals of Program of Work 10
- Identification of measurements of success 5
- Analysis of results of previous time period 5

Findings

Most of the BPWA programs and services appear to be carrying out the association's mission, that of supporting the businesswomen in Amman. Its Business Information Center, its Legal Center, its advocacy programs, its new WEPIA program, and other event activities are of assistance to some women. Unfortunately, BPWA has lost its focus and needs to carefully reconsider the basic programming philosophy of the organization.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 2.5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 2.5

Findings

Somewhat committed to the planning process, the board needs to go through a completely new strategic planning process to set realistic goals and objectives and to develop a program of work that is achievable and results-oriented.

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 2.5
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

BPWA is carrying out fundamentally sound administrative strategies that are appropriate for explaining the organization's programs and activities to its members and to the general public. Some improvements are needed.

Total Possible Points = 100

Total Points for Criterion 75

MAJOR CRITERION FINDING

BPWA's approach to programming needs to be revised. The current activities and programs fit well within the parameters established by the vision and mission of the organization, but instead of "doing things right," the board needs to determine if it is doing "the right things."

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of professional staff 5
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 5
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 10
- Job description of executive staff 10

Findings

With an excellent education and background, the new BPWA's executive director Shireen Nassar is a capable manager whose experience is very valuable to the Kingdom of Jordan. With additional training and experience in specific association management skills, this executive can be a top leader for many years.

Section Two

- Relevant experience of program staff 5
- Relevant experience of administrative staff 5
- Analysis of performance evaluation form 5
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 0
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 0
- Performance bonus plan 2.5
- Staff retention rate 0
- Staff awareness of importance of programming and financial success of organization 0

Findings

While many normal personnel activities are conducted on a regular basis, BPWA's productivity could be improved with a few additional personnel techniques. Every effort should be made to lower the employee turnover rate. Time sheets should be implemented to make certain that staff costs are being charged to appropriate programming budgets.

Total Possible Points = 100

Total Points for Criterion 80

MAJOR CRITERION FINDING

The competency of the personnel at the BPWA is not the problem at this organization. The clear problem is the lack of philosophical clarity at the board level and too much involvement in the day-to-day operations of the association by directors.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of the most recent financial reports 5
- Analysis of the current budget and link with strategic plan 5
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 5

Findings

The fundamentals of financial management have been implemented at BPWA. The proper use of the financial data for planning purposes seems to be lacking.

Section Two

- Stability and diversification of level of funding (including non-dues income) 2.5
- Analysis of dues schedule 2.5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 5
- Overhead, personnel, and program costs are segregated 0

Findings

The entire financial philosophy of the organization needs to be reconsidered. Dues are extremely low and the lack of an aggressive approach to membership has caused under-funding for such an important group.

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 2.5
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 1.5
- Staff compensated sufficiently for revenue generation activities 1.5
- Annual investment campaign conducted and goals met 2
- Cost of service to members calculated and utilized. 0

Findings

An additional calculation would be useful to the decision making process—the calculation of the cost-of-service for members. The key question is “What does it cost BPWA to have a member on the rolls?” The expenses of mailings, printing, staffing, etc, should be part of an overall cost-of-service estimate that will allow the executive manager to determine if each new member is adding profits to the revenues.

Total Possible Points = 100

Total Points for Criterion 60

MAJOR CRITERION FINDING

Its members under fund BPWA. Ninety four percent of the budget comes from donors and events. A more appropriate balance between dues and non-dues income should be achieved. While proper accounting practices have been institutionalized and reports and financial safeguards seem to be in place, these basic accounting tasks have not led to proper financial management. BPWA appears to have a sound accounting

system, however, it is questionable whether the board is properly using that accounting information to analyze the programs and services of the organization.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Central message answering question "what's in it for me?" 0
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 5
- Membership directory 5

Findings

While BPWA has been able to attract some new members and retain some existing members, a better-organized effort along with a change in strategic planning and an updating of the organization's philosophy should be undertaken to reach maximum market penetration.

Section Two

- Membership recruitment plan & system 2.5
- Total number of new members within the past year 2.5
- Estimate of the total number of potential members 0
- Percent of total potential members that are currently actual members 0
- New member orientation outline and handout material 0

Findings

BPWA is not offering its services and programs in an appealing form that the vast majority of Amman businesswomen find valuable. Changes need to be made.

Section Three

- List the member benefits as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 2.5
- Committee preference cards sent annually to members 0
- New members immediately invited to serve on a committee 2.5
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 2.5
- Non-dues sources of income & strategy to promote discounts to members 0
- Orientation handout materials 0
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Findings

While some fundamental membership devices are in place and the organization's underlying philosophy is revised, BPWA could improve its recruitment and retention rate considerably by utilizing more professional techniques that have proven to work elsewhere.

Total Possible Points = 100 Total Points for Criterion 52.5

MAJOR CRITERION FINDING

BPWA needs to become more sophisticated in the membership recruitment and retention arena. The staff should research, plan, adopt, and use the best techniques that have been developed by other associations and organizations.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of core communication message 10
- Comprehensiveness of the communication plan relative to the strategic plan 5
- Analysis of professional communication staff 0
- Analysis of key target audiences 0
- Analysis of communication feedback mechanisms (assessment & tracking) 0

Findings

BPWA's core message needs to be developed and a strong communication program needs to be put into place.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 5
- Analysis of writing for readership 5
- Correctly selected communication media 0
- Frequency of communication campaign 0

Findings

In addition to techniques and skills, sufficient communication research using surveys, focus groups, and feedback mechanisms need to be employed.

Section Three

- Communication plan that covers all parts of strategic plan 0
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 2.5
- Analysis of program brochures 2.5
- Analysis of news releases and media kit .25
- Analysis of Web site or Web sites 2.5
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

Though some communication media are being used, there does not seem to be an underlying logic or approach to selecting target audiences, developing specific messages, and matching communication channels to reach those audiences. A well thought out approach using the proper media for each selected targeted audience needs to be implemented.

Total Possible Points = 100 Total Points for Criterion 47.5

MAJOR CRITERION FINDING

Membership development and communications are the weak links in the organizational activities for BPWA. More time, money, staff time, and brainpower should be used in concentrating on what is the best way to "tell BPWA's story."

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)
 Total possible score for this Criterion is 100 points.

Section One

- Analysis of public policies that prohibit job creation 10
- Analysis of obstacles to overcome to achieve economic growth 10
- Analysis of business association's adopted government policy positions 5
- Professional capabilities of government affairs staff 5
- Analysis of issue briefs produced by the business association 5

Findings

BPWA has for many years attempted to have an influence on public policy. It has had some degree of success; however, the association needs to institutionalize its governmental affairs program by documenting its board's policies and utilizing issue briefs to educate its members.

Section Two

- Establishment of public policy advocacy committee 5
- Availability of staff to research legal and economic issues. 0
- List of priority issues 5
- Analysis of research reports produced or authorized 2.5
- Analysis of reports to the board and the membership on government affairs activities 0

Findings

The board needs to add professional staff in governmental affairs.

Section Three

- Analysis of business association's participation in anti-corruption program 0
- Analysis of government tax policies effect on business association's members 0
- Tracking proposals through the legislative process 0
- Testimony before public bodies on key issues 0
- Grass roots campaign efforts 0
- Coalition building efforts of association 2.5
- Understanding of the political dynamics of the nation 2.5
- Member education program on public policy 2.5
- Ability to build public support for government policy changes 0
- Ability to launch a letter writing campaign on key issues 0

Findings

Many advocacy techniques are available to associations. BPWA needs to make certain that it is utilizing the best approaches for its national situation to advocate its members' needs. There is little evidence that the wide variety of available techniques have been explored.

Total Possible Points = 100 Total Points 55

MAJOR CRITERION FINDING

BPWA has been relatively successful in public policy advocacy because it has selected some key issues and has wisely used the contacts of its politically connected members. That approach can be successful in the short term, but for an association to be successful long-term, it must utilize the best advocacy techniques in addition to politics of personal influence.

CRITERION TEN: MANAGEMENT SYSTEMS/INFORMATION TECHNOLOGY

Purpose of Criterion Ten: *To assess the management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of overall information technology systems to streamline activities (i.e. Microsoft Project for work plan, MS Outlook prompts, MS Access for database to generate mailing lists, labels, etc) 5
- Executive computer and technology philosophy 10
- Staff computer efficiency and technical capabilities 5
- Operational policies & procedures manuals 10
- Documentation of record-keeping activities 10

Finding

Documentation of operational policies and procedures needs to be developed at BPWA in the area of technology. Standards and procedures for each technology needs to be established and documented to institutionalize the organization's use of one of its most extensive investments.

Section Two

- Availability and utilization of database software 5
- Analysis of Web site(s) 10
- Analysis of forms used in accordance with Operational Policies & Procedure manual 0
- Analysis of specific system hardware 0
- Utilization of e-business capacity 0

Finding

The existing Web site is very good; however, a new Web site is under construction. Other routine technology management approaches including e-business need to be adopted.

Section Three

- Study of e-mail utilization 2.5
- Analysis of written communications – business letters, brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 0
- Utilization of fax machine networks 2.5
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 2.5
- Assessment of desktop publishing capabilities 0
- Evidence of technology upgrade awareness 2.5
- Evidence of technology upgrade plans 2.5

Findings

BPWA has the basic information technology, however, upgrades are in order and seeking new ways to utilize existing and future technology should be on the management's agenda.

Total Possible Points = 100

Total Points for Criterion 80

MAJOR CRITERION FINDING

BPWA has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization, but additional technology capacity would be very useful and helpful in making the organization's staff more efficient.

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|---------------------------------|
| SUMMARY SHEET FOR POINTS |
|---------------------------------|

| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 60 |
| Criterion Two: Governing Body, Officers, and Directors | Points 66 |
| Criterion Three: Organizational Structures | Points 70 |
| Criterion Four: Programs, Services, and Activities | Points 75 |
| Criterion Five: Association Staff | Points 80 |
| Criterion Six: Financial Planning and Reporting | Points 60 |
| Criterion Seven: Membership Development and Recruiting | Points 53 |
| Criterion Eight: Communications and Public Relations | Points 48 |
| Criterion Nine: Government Affairs | Point 55 |
| Criterion Ten: Management Systems & Information Technology | Points 80 |
| Total Criteria Points | 647 |

| |
|---|
| <p>FORMULA: Total Criteria Points divided by 1000 equals percentage score. $647/1000 = .647/100 = 65\%$</p> |
|---|

Amman Business and Professional Women's Association

COMPARATIVE RATIO SCORE 65%

Certification Statement

Therefore, the Amman Business & Professional Women's Association, a business association received a 65 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/28/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
YOUNG ENTREPRENEURS ASSOCIATION**

BASIC FACTS ABOUT THE YOUNG ENTREPRENEURS ASSOCIATION

Business Association name: Young Entrepreneurs Association

Address: P.O. Box 1652

Telephone: 962 6 565 2151

Fax: 962 6 565 2159

Email: yea@nol.com.jo

Name of Chief Volunteer: Laith Al Qasem

Title: Chairman/President

Name of Chief Paid Executive: Dina Dunkqan

Title: Executive Director

Date of Organization's Founding: 1998

Number of Members: 172

Budget Size: 100,000 JD

In USD: \$141,000

SUMMARY OF KEY POINTS

Diagnostic Score: 82% as of 3/15/2002

The Young Entrepreneurs Association, a non-profit, membership-based business association, was established to encourage the creation of young entrepreneurs through idea exchanges, education, training and advocacy to improve skills that will help the participants to become competitive in the global market.

Over the past four years, YEA has hosted international speakers and numerous training courses, seminars, and workshops. The association's staff has participated fully in the AMIR business association capacity building efforts. YEA members have represented the association in conferences and training seminars in Europe, North Africa and the Middle East. Building partnerships and coalitions with other Jordanian business associations, YEA helped launch the Jordan Vision 2020, an economic initiative to develop a private sector economic strategy that will guide the nation's growth during the first twenty years of the 21st Century.

The association's leaders have a vision to create an entrepreneurial and leadership culture as the cornerstone of national economic development. To achieve this vision, the following objectives have been adopted:

1. To identify and organize entrepreneurs in Jordan;
2. To change mindset through the promotion of innovation and creativity;
3. To affect public policy to improve the business environment;
4. To facilitate success of entrepreneurial ideas through provision of relevant training and education;
5. To develop a forum for networking among members and the global business community; and
6. To promote best ethical business practices.

YEA has had very strong capable board and staff leadership. Headed by one of Jordan's outstanding young entrepreneurs, Mr. Laith Al Qasem, the nine-member board is active and dedicated to accomplishing the vision by following the mission of the organization. There are 172 members of YEA. The organization's staff is housed in a very nice office complex that has all the basic technological equipment needed in today's competitive world.

The chief staff officer is Dina Dunkqan, who appears to be extremely capable and also dedicated to achieve the objectives of the association. Assisting her are a total of 8 staff members including Rami Takrouri, the executive director of the Jordan Vision 2020 program. Mr. Takrouri is an outstanding young association executive who is working hard to build the coalition of various entities needed to carry out this long-range program.

A member said, "YEA has a good reputation, is helpful to its members, and adds value to the investment that we make in the association; however, the association needs

to move beyond event management and begin educational programs to create more entrepreneurs.”

The diagnostic assessment shows that YEA could (1) strengthen its membership recruitment efforts; (2) improve their public relations and communications program; (3) add networking opportunities for its members; (4) clarify the definition of entrepreneur; and (4) further develop their ability to advocate change in public policy.

Overall YEA is an effective business association that is attracting the key entrepreneurs of Jordan who will be major assets for the nation and strong leaders for the future.

SPECIFIC RECOMMENDATIONS FOR THE YOUNG ENTREPRENEURS ASSOCIATION

Organizational Leadership

1. The YEA board and staff need to clarify its definition of “entrepreneur.”
2. The YEA board and staff should establish a crisis management plan.
3. Chairman along with the executive director needs to develop a formal orientation plan and materials for board, committee chair, new members, and the staff.
4. A few of the directors should move YEA higher on their priority list to spend the necessary time and energy to properly participate and to carry out the fiduciary and leadership duties of the position of director.

Communications

5. More time, money, manpower, and brainpower should be used in concentrating on how best to “tell YEA’s story.”
6. Staff needs to move to the next level of communication sophistication by developing further a plan to carefully identify YEA’s target audiences and to select the appropriate media to “speak to” those audiences.
7. Staff needs to develop mechanism to “listen carefully” to its members and the general public.
8. YEA should solicit professional communication assistance from donor groups.

Government Affairs

9. At some point in the future, YEA needs to increase its intensity in attempting to change public policy on behalf of its members by increasing its research capabilities and by adding more professional governmental affairs specialists to its staff.

Membership

10. Board and staff need to strengthen membership recruitment and retention plans and activities.

Personnel

11. The executive director needs to work on interpersonal relationship skills and on stress management techniques in order to prevent early burn out.
12. The executive director needs to work toward establishment of a Jordanian association executives association to establish a higher level of professional availability for personnel.

Information Technology

13. The association needs to upgrade its computer and information technology capacity to meet its major objectives.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Vision Statement 10
- Mission statement 5
- Bylaws and charter 10
- Membership needs assessment 5
- Comprehensive strategic plan 10

Findings

YEA has worked closely with AMIR consultants to establish the basic fundamentals of organizational management. The staff and the board are carrying out the foundational elements for an outstanding association. Still, the definition of “entrepreneur” and “entrepreneurship” is left to the imagination of the members. A specific understanding of the terminology is needed, according to some members.

Section Two

- Objectives 5
- Integrated Action Plan 5
- Performance Audit 5
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members on Results of Action Plans 5

Findings

Documentation for each of the recommended functions was displayed and perused.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 2.5
- Business association's internal environment or culture 2.5
- Understanding of the strengths of the business association 2.5
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 2.5
- Understanding of the threats to the business association 2.5
- Contingency planning 2.5
- Documentation of implementation of action plans 2.5

Total Possible Points = 100

Total Points for Criterion 90

CRITERION MAJOR FINDING

YEA's leadership has established all the recommended functions and activities for their association; however, a clearer definition of “entrepreneur” and “entrepreneurship” is needed.

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)
 Total possible score for this Criterion is 100 points.

Section One

- Effective bylaws/constitution 10
- Commitment of officers to association (time & resources) 10
- Decision making capabilities and willingness of board 10
- Avoidance of micro-management by the board 10
- Volunteer officers' background / industry positions held by officers 10

Findings

The current bylaws and constitution are serving YEA very well. In most organizations, some directors are more committed than others and YEA is no exception. While most of the board members spend the necessary time and resources to serve, a few apparently are not willing or are not able to commit the time to be really effective directors.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant educational background 5
- Officer-orientation plan, training and association material 0
- Job descriptions for officers and directors 5
- Term limits of officers 5

Findings

A notable exception to the excellent organizational efforts is the lack of a formal orientation program for the officers, directors, and the staff of the association. Such a program can cut short the time to bring the participating parties up to speed on the efforts of the organization and make the participation in YEA much more satisfying.

Section Three

- Staggered terms for officers 2.5
- Board culture 2.5
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic planning, brainstorming, administrative, and project planning meetings 2.5
- Attendance at board meetings 1
- Length of board meetings 2.5
- Participation of all directors in board meetings 1

Findings

Director attendance has been less than perfect, thereby limiting broad representation. With half of the board to be replaced in a few months, formalized orientation program outlining the expectations for the directors could prove to be a valuable undertaking.

Total Possible Points = 100 Total Points for Criterion 92

CRITERION MAJOR FINDING

With the exceptions noted above in Findings, YEA's governing body is fundamentally sound and should serve the membership and the nation very well in the coming years.

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One:

- Analysis of appropriateness and effectiveness of department/division structures 10
- Regular board meetings 10
- Minutes of board meetings 10
- Staff understanding of and support to structure of organization 10
- Well-defined decision-making process 10

Findings

Without question, YEA has developed a fundamentally correct organizational structure.

Section Two

- Published organizational chart 5
- Regular committee meetings 5
- Minutes of committee meetings 5
- Relationships between board and members 5
- Relationships between board and staff 5

Findings

YEA has established basic documents and the appropriate relationships in all areas of organizational endeavor.

Section Three

- Number of standing committees 2.5
- Number of special task forces, ad hoc groups, and number/description of affiliate groups 2.5
- Staff exposure to the board 2.5
- Documentation of committee structure 2.5
- Staff assignments to manage board functions & committees 2.5
- Committee orientation plan and materials 2.5
- Documentation of committee reports 2.5
- Analysis of committee chairs 2.5
- Lists of board and committee members 2.5
- Committee chair and member orientation materials 2.5

Findings

YEA has four standing committees including Education and Training, Membership Services, Public Relations and Communications, and Public Policy Advocacy. According to the executive director, a fifth committee is to be established: the Networking Committee.

Total Possible Points = 100 Total Points for Criterion 100

CRITERION MAJOR FINDING

On the whole, YEA is adhering to or exceeding the generally accepted management principles for similar business associations in other nations.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's super-ordinate goal 10
- Analysis of specific goals of Program of Work 5
- Identification of measurements of success 10
- Analysis of results of previous time period 10

Findings

YEA has impressive programs and services that are targeted to carry out the association's mission.

Additional programs to help create entrepreneurship and to provide more direct services to entrepreneurs are needed, according to members of YEA.

Section Two

- Achievability of stated goals 5
- Available manpower and monetary resources 5
- Length of time for tangible achievements & realistic deadlines for results 5
- Documentation of programs and plans in annual reports 5
- Commitment to planning process 5

Findings

Committed fully to the planning process, YEA has strategic and operational plans.

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 2.5
- Coordination between programming committees 2.5
- Coordination between programming staffs 2.5
- Coordination and cooperation between programming and administrative staffs 2.5
- Organization culture for achievement and results 2.5
- Documentation of programs and plans in brochures 2.5
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 2.5

Findings

YEA is doing the activities and the programming that both members and donor organizations have requested. Moving into the arena of member discount cards should further enhance the value of belonging to YEA.

Total Possible Points = 100

Total Points for Criterion 95

CRITERION MAJOR FINDING

YEA's approach to programming is fundamentally sound. While there is always room for improvement, the current activities and programs fit well within the parameters established by the vision and mission of the organization. All activities and programs seem to be directed at promoting the basic organizational philosophy and goals. Additional networking opportunities for its members would improve the overall

membership satisfaction rate. Also additional programs and direct services to entrepreneurs would add value to the YEA membership investment.

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of professional staff 5
- Relevant experience of executive staff 10
- Key staff shares vision and mission of the board of directors 10
- Relevant and useful Personnel Procedures Manual (containing a salary scale) 10
- Job description of executive staff 10

Findings

The executive director of YEA is a very competent and intelligent executive who is managing the organization according to the normally accepted association management principles. Unfortunately, she appears to be under an extreme amount of stress brought about by the day-to-day pressures of being a chief staff officer. She needs to undertake a program of stress management in order to avoid early burn out. She also should attempt to build more amiable relations with other fellow-association executives.

Section Two

- Relevant experience of program staff 2.5
- Relevant experience of administrative staff 2.5
- Analysis of performance evaluation form 5
- Regularity of staff meetings 5
- Documentation of names, positions, and résumés of the staff 5

Findings

Because of a limited pool of available job seekers, like the other business associations YEA has been hampered by the lack of experience of its personnel in the normal skills needed. On-the-job training has been a necessity.

Section Three

- Analysis of staff hiring & retention policies 2.5
- Regularity of staff updates of key stakeholders and members 2.5
- Analysis of job application form 2.5
- Employee time sheet for programming records 2.5
- Job descriptions of programming staff 2.5
- Job descriptions of administrative staff 2.5
- Comparative salary analysis 2.5
- Performance bonus plan 2.5
- Staff retention rate 2.5
- Staff awareness of importance of programming and financial success of organization 2.5

Findings

YEA should judiciously invest in its people, providing training, motivation, and compensation that will encourage long-term employment.

Total Possible Points = 100

Total Points for Criterion 90

CRITERION MAJOR FINDING

While competent and well-motivated people have been hired, the lack of previous experience in association operations has caused some delays in achieving the type of results that could have been achieved had

experienced personnel been available. Additional training in fundamental skills is a continuing challenge that the executive director is attempting to meet.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of the most recent financial reports 10
- Analysis of the current budget and link with strategic plan 10
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 10

Findings

The fundamental processes of financial management are evident in the day-to-day operations of YEA. Transparency and efficiency seem to be the watchword for the executive director's approach to the accounting practices of the association. A former financial manager, Dina Dunkqan brings years of experience to YEA.

Section Two

- Stability and diversification of level of funding (including non-dues income) 0
- Analysis of dues schedule 5
- Clearly written financial policies and procedures 5
- Strategy in place with specific revenue goals 5
- Overhead, personnel, and program costs are segregated 5

Findings

The financial management fundamentals appear to be in place and practiced by the staff and board of YEA; however, additional non-dues income and non-donor income need to be found.

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 2.5
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 2.5
- Grant writing capability 2.5
- Number of staff assigned to help create revenue 2.5
- Staff compensated sufficiently for revenue generation activities 2.5
- Annual investment campaign conducted and goals met 2.5
- Cost of service to members calculated and utilized. 0

Findings

One additional calculation would be useful to the decision-making process. That is the calculation of the costs of service for members. The key question is, "What does it cost YEA to have a member on the rolls." Mailing and printing costs, staffing costs, etc., should be figured into an overall cost of service number that will allow the executive director to determine the breakeven cost for a new member.

Total Possible Points = 100

Total Points for Criterion 92.5

MAJOR CRITERION FINDING

Proper accounting practices have been institutionalized at YEA. Reports and financial safeguards seem to be in place and transparency of financial transactions is common practice. Regular external audits are conducted. YEA appears to be on a sound financial footing.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer’s Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Central message answering question “what’s in it for me?” 5
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 5
- Membership directory 5

Findings

YEA has been able to attract new and retain existing members; however, a better-organized effort should be undertaken to reach maximum market penetration. The central membership message should focus on explaining to prospects the benefit, rather than emphasizing the services or activities of belonging.

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 5

Findings

YEA has carefully laid out its plan of action for membership and has developed the marketing tools and data necessary for successful recruiting.

Section Three

- List the benefits of becoming a member of the association as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 1.5
- Committee preference cards sent annually to members 1.5
- New members immediately invited to serve on a committee 2.5
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 2
- Non-dues income & strategy to promote member discounts 2.5
- Orientation handout materials 2.5
- Certificates and awards 2.5
- Other volunteer recognition devices 0

Findings

Because of her lack of long-term experience with business associations, the executive director sees little need for devices of appreciation for volunteer work. The best associations to encourage participation and loyalty successfully use such recognition tools.

Total Possible Points = 100 Total Points for Criterion 80

MAJOR CRITERION FINDING

YEA needs to study carefully what it is communicating to its potential and existing members. Simply telling them how hard the board and the staff is working is not enough, nor is listing the activities and services sufficient to spark interest. YEA’s staff and board need to concentrate on the benefits of members. They must be able to answer the question “what’s in it for me?” in precise language that will cause people

to come to the conclusion on their own that the money paid to YEA is a good investment in their own future.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of core communication message 5
- Comprehensiveness of the communication plan relative to the strategic plan 0
- Analysis of professional communication staff 5
- Analysis of key target audiences 0
- Analysis of communication feedback mechanisms (assessment & tracking) 5

Findings

YEA's message has apparently been heard; however, it could have been much more effective by several magnitudes had more sophisticated communication techniques been employed. This is the major weakness of the organization and improvements can be easily attained if this function of the association is prioritized and highly regarded by the leadership and sufficient funds are spent. A comprehensive communication plan is needed with target audiences identified, and feedback mechanism put into use.

Section Two

- Communications that improve the BA's image, inform the public & increase membership 5
- Communication research with facts describing problems 5
- Analysis of writing for readership 5
- Correctly selected communication media 0
- Frequency of communication campaign 0

Findings

While YEA has the rudimentary elements of proper association public relations programs in place, it is time to move to the next level of sophistication with proper media and frequency in order to re-enforce the association's core message.

Section Three

- Communication plan that covers all parts of strategic plan 0
- Analysis of newsletter 2.5
- Analysis of magazine 0
- Analysis of action bulletins 2.5
- Analysis of program brochures 2.5
- Analysis of news releases and media kit .25
- Analysis of Web site or Web sites 2.5
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 2.5
- Staff awareness of importance of communication efforts 2.5

Findings

A well thought out approach using the proper media for each selected targeted audience needs to be implemented.

Total Possible Points = 100 Total Points for Criterion 47.5

MAJOR CRITERION FINDING

Membership development and communications are the weak links in the organizational structure for YEA. More time, money, manpower, and brainpower should be used in concentrating on how best to "tell YEA's story."

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- | | | |
|--|----|----|
| • Analysis of public policies that prohibit job creation | 10 | |
| • Analysis of obstacles to overcome to achieve economic growth | 10 | |
| • Analysis of business association's adopted government policy positions | | 10 |
| • Professional capabilities of government affairs staff | 5 | |
| • Analysis of issue briefs produced by the business association | 0 | |

Findings

YEA's major governmental affairs program has been the Jordan Vision 2020. The very successful initiative has gained the cooperation of 28 business associations as well as the Jordanian public sector. This endeavor is to develop a national economic strategy that will guide Jordan's development and growth during the 21st Century. While that overall program has been successful, the issues relating to economic barriers should be extensively researched with the aim of compiling issue briefs to be used to successfully "lobby" needed public policy changes.

Section Two

- | | | |
|--|-----|---|
| • Establishment of public policy advocacy committee | 2.5 | |
| • Availability of staff to research legal and economic issues. | 2.5 | |
| • List of priority issues | 5 | |
| • Analysis of research reports produced or authorized | 2.5 | |
| • Analysis of reports to the board and the membership on government affairs activities | | 5 |

Findings

The fundamentals for success in public policy advocacy are in place at YEA.

Section Three

- | | | |
|--|-----|-----|
| • Analysis of business association's participation in anti-corruption program | 0 | |
| • Analysis of government tax policies effect on business association's members | | 2.5 |
| • Tracking proposals through the legislative process | 0 | |
| • Testimony before public bodies on key issues | 0 | |
| • Grass roots campaign efforts | 0 | |
| • Coalition building efforts of association | 2.5 | |
| • Understanding of the political dynamics of the nation | 0 | |
| • Member education program on public policy | 2.5 | |
| • Ability to build public support for government policy changes | 2.5 | |
| • Ability to launch a letter writing campaign on key issues | 0 | |

Findings

To have a well-rounded governmental affairs program, YEA needs to use different governmental affairs techniques as listed above.

Total Possible Points = 100

Total Criterion Points 62.5

MAJOR CRITERION FINDING

YEA has been successful in the governmental affairs arena because it has been able to build a strong coalition on an important national issue with other associations. It now needs to select key public policy issues and set about to effect changes that will create a better business atmosphere for entrepreneurship.

CRITERION TEN: MANAGEMENT SYSTEMS AND USE OF INFORMATION TECHNOLOGY

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Total possible score for this Criterion is 100 points.

Section One

- Analysis of overall information technology systems to streamline activities (i.e. Microsoft Project for work plans, MS Outlook prompts, MS Access for databases to generate mailing lists, labels, etc) 5
- Executive computer and technology philosophy 10
- Staff computer efficiency and technical capabilities 5
- Operational policies & procedures manuals 10
- Documentation of record-keeping activities 10

Finding

Given the current IT system now in place, the staff is operating at a high level of efficiency. Updated hardware and software are being considered and should be incorporated as budgetary constraints allow.

Section Two

- Availability and utilization of database software 5
- Analysis of Web site(s) 5
- Analysis of forms used in accordance with Operational Policies & Procedure manual 5
- Analysis of specific system hardware 5
- Utilization of e-business capacity 2.5

Finding

E-business, the wave of the association future, is being adopted and will be in place at YEA by year's end. With membership cards for various discounts and a Web site that provides products and services for entrepreneurs, YEA should be in the forefront of high technology as the 21st Century moves forward.

Section Three

- Study of e-mail utilization 2.5
- Analysis of written communications – business letters, brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 2.5
- Utilization of fax machine networks 2.5
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 2.5
- Assessment of desktop publishing capabilities 0
- Evidence of technology upgrade awareness 2.5
- Evidence of technology upgrade plans 2.5

Findings

YEA is a technology driven organization. Upgrades are always in order and seeking new ways to utilize existing and future technology is on the management's agenda.

Total Possible Points = 100

Total Points for Criterion

85

MAJOR CRITERION FINDING

YEA has sufficient management systems, information technology, and hardware capacity in place to accomplish the mission and objectives of the organization. It needs to upgrade its capacity to meet its major objectives.

SUMMARY SHEET FOR POINTS

| | |
|---|-------------------|
| Criterion One: Mission, Objectives, and Documents | Points 90 |
| Criterion Two: Governing Body, Officers, and Directors | Points 92 |
| Criterion Three: Organizational Structures | Points 100 |
| Criterion Four: Programs, Services, and Activities | Points 95 |
| Criterion Five: Association Staff | Points 90 |
| Criterion Six: Financial Planning and Reporting | Points 93 |
| Criterion Seven: Membership Development and Recruiting | Points 80 |
| Criterion Eight: Communications and Public Relations | Points 48 |
| Criterion Nine: Government Affairs | Points 68 |
| Criterion Ten: Management Systems & Information Technology | Points 63 |
| Total Criteria Points | 819 |

FORMULA:
Total Criteria Points divided by 1000 equals
percentage score. $819/1000 = .819/100 = 82\%$

Young Entrepreneurs Association

COMPARATIVE RATIO SCORE **82%**

Certification Statement

Therefore, the Young Entrepreneurs Association, a business association, received a 82 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/9/02

Name of the Interviewer: Larry Milner, CAE

**DIAGNOSTIC ASSESSMENT
OF
JORDAN SOCIETY OF TOURISTS AND TRAVEL AGENTS**

BASIC FACTS ABOUT THE JORDAN SOCIETY OF TOURISTS & TRAVEL AGENTS

Business Association name: Jordan Society of Tourists & Travel Agents

Address: P.O. Box 7090

Telephone: 962 6 4638599

Fax: 962 6 4611302

Email: info@jsta.org

Web Site: www.jsta@org.jo

Name of Chief Volunteer: Bishara Sawalha

Title: Chairman of the Board

Name of Chief Paid Executive: Yousef A. Mowaswas

Title: Manager

Number of Members: 350

Date of Organization's Founding: 1960

Budget Size: 35,000 JD

In USD: \$49,350

SUMMARY OF KEY POINTS

Diagnostic Score: 44% as of 3/12/2002

The Jordan Society of Tourist & Travel Agents (JSTA) is a not-for-profit business association whose mission is to represent the 350 travel agency professionals in Jordan. JSTA was founded in Jerusalem by a small number of travel agents, then moved to Jordan after the 1967 war. The association itself is a member of many international travel federations.

Its major program is training employees of travel agencies on how to utilize the international networks for the traveling public. The association has compulsory membership with entries to the travel agency business required to receive permits from JSTA, as well as the Ministry of Tourism. JSTA is attempting to ensure the maximum development and protection of the economic, judicial and social spheres for the travel agency profession. Its major activity is training the employees of its members in using the international travel information systems that have been established by the airlines, hotels, and tourist attractions. It also has three director seats on the Jordan Tourist Board, the official tourist-promotion-government agency.

According to the JSTA's Web site, its verbatim mission statement reads as follows:

“JSTA real concept about industry of tourism means many things the most important of which are (a) Unite and reinforce of national travel agents; to act as a sole representative of the travel agency professions at local, international and world wide levels; (b) to ensure the maximum possible cohesion, juridical(sic) and social spheres for the travel agency profession; (c) to enable the profession to take its rightful place in the tourist trade economy; (d) to represent the interests of the travel agents on a permanent basis through its direct access to international associations or principal; (e) deals with all problems in relation to the travel and tourist industry developing, recommending to its members new or important professional techniques; (f) cooperates with governmental and non governmented (sic) bodies, in the preparation of elaboration of conventions, exhibitions governing travel agency, relations with part involved with tourist trade.”

With five full time employees, JSTA has 350 corporate members and 428 individual and other members. It has annual revenues of JD52, 000, an extremely small budget for such an important association. It is located in a modest office building with very limited space. Its training room is well equipped, but very crowded. It has little documentation of its policies and activities and needs to institutionalize many known fundamentals of association management.

JSTA needs to make several administrative and policy changes to make it a modern, successful association. There has been very little or no forethought given to crisis management communication. In today's volatile world, it can be very hazardous for organizations not to be prepared to handle the impact of sudden events that can effect images and programs in the future.

The association's seasoned executive director, Yousef Mowaswas, and enthusiastic President, Bishara Sawalha, are interested in rethinking the overall objectives of the association to include a more active role in attracting tourists to Jordan. A great deal of patience and assistance from AMIR will be needed to accomplish a conversion of JSTA to a tourist promotion group. Mr. Mowaswas is a recognized expert in the tourist industry who gives lectures at universities and at official gatherings and Mr. Sawalha is a successful travel agent who had a thriving business prior to the September 11th attack on the USA.

JSTA's basic philosophy and objectives are outdated and poorly stated. Overall, JSTA is an organization whose mission should be reconsidered and revamped to serve the needs of the tourist industry in the 21st Century.

SPECIFIC RECOMMENDATIONS FOR THE JORDAN SOCIETY OF TOURISTS AND TRAVEL AGENTS

Organizational Philosophy

1. The board and the staff need to undertake complete reassessments of JSTA's vision, mission, objectives and programs. The association is missing major opportunities to be in the forefront of developing modern and effective tourist development programs for the nation.

Government Affairs

2. In addition to the organization's philosophy, its governmental affairs efforts need to be modernized and updated to fit the times.

Membership

3. Until mandatory membership is eliminated, JSTA will not reach its full potential as a powerful force for change in the tourist industry of the nation and the region.

Finances

4. The board needs to secure proper financing for the organization.

Technology

5. Staff needs to upgrade its technology and in particular its Web site.

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

- Section One** - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
- Section Two** - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)
- Section Three** - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Vision Statement 0
- Mission statement 5
- Bylaws and charter 10
- Membership needs assessment 0
- Comprehensive strategic plan 5

Findings

JSTA does not have a well-designed comprehensive strategic plan with vision and mission statements built on a membership needs assessment. The society's major focus is training employees for its members.

Section Two

- Objectives 5
- Program of Work 0
- Performance Audit 0
- Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees 5
- Annual Report to Members on Results of Action Plans 5

Findings

More sophisticated planning methodologies need to be employed.

Section Three

- Understanding of the macro environment of nation 2.5
- Understanding of the industry environment in nation 2.5
- Understanding of the competitive environment 0
- Business association's internal environment or culture 0
- Understanding of the strengths of the business association 0
- Understanding of the weaknesses of the business association 2.5
- Understanding of the opportunities of the business association 0
- Understanding of the threats to the business association 2.5
- Contingency planning 0
- Documentation of implementation of action plans

Findings

While the leadership has verbalized a few organizational accomplishments and plans, there is no formal or institutionalized planning process in place.

Total Possible Points = 100

Total Criterion Points 45

CRITERION MAJOR FINDING

Because JSTA is has a mandatory membership base and the management views its major task as training employees for its members, the basic philosophy of the organization is rudimentary in depth and no creative planning for future development is presently underway.

CRITERION TWO: GOVERNING BODY, OFFICERS, & DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Effective bylaws/constitution 5
- Commitment of officers to association (time & resources) 5
- Decision making capabilities and willingness of board 10
- Avoidance of micro-management by the board 5
- Volunteer officers' background / industry positions held by officers 10

Findings

The current bylaws and constitution have served JSTA for many years. Consideration should be given to expanding the role of JSTA by adding a more aggressive tourist-marketing program.

Section Two

- Attendance at general membership meetings 5
- Community position of officers & relevant educational background 5
- Officer-orientation plan, training and association material 0
- Job descriptions for officers and directors 5
- Term limits of officers 2.5

Section Three

- Staggered terms for officers 0
- Board culture 2.5
- Board procedures 2.5
- Board agendas 2.5
- Board reports 2.5
- General membership meeting 2.5
- Proper agendas for strategic planning, brainstorming, administrative, and project planning meetings 2.5
- Attendance at board meetings 1.5
- Length of board meetings 2.5
- Participation of all directors in board meetings 1

Total Possible Points = 100

Total Points for Criterion 73

CRITERION MAJOR FINDING

JSTA would benefit greatly from a complete revision of its bylaws and programs to better serve the needs of its members and the needs of the Jordan tourist industry.

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's activities to determine the effectiveness of the association's programming process.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of major focus of Program of Work 10
- Explanation of the Program of Work's super-ordinate goal 5
- Analysis of specific goals of Program of Work 5
- Identification of measurements of success 5
- Analysis of results of previous time period 5

Findings

TSTA has an impressive program of training the employees of its members. The training is provided free to member agencies.

Section Two

- Achievability of stated goals 2.5
- Available manpower and monetary resources 0
- Length of time for tangible achievements & realistic deadlines for results 0
- Documentation of programs and plans in annual reports 2.5
- Commitment to planning process 0

Section Three

- Measurement of involvement of stakeholders in planning process 2.5
- Coordination between fiscal planning and program planning 0
- Coordination between programming committees 0
- Coordination between programming staffs 0
- Coordination and cooperation between programming and administrative staffs 0
- Organization culture for achievement and results 0
- Documentation of programs and plans in brochures 0
- Explanation of programs in newsletters 2.5
- Documentation of programs in bulletins 2.5
- Documentation of products and services 0

Total Possible Points = 100

Total Points for Criterion 42.5

CRITERION MAJOR FINDING

JSTA's approach to programming has suited its members over the past 30 years. While there is room for improvement, the current activities and programs fit well within the parameters of the philosophy of the board of directors. All activities and programs seem to be directed at improving the caliber of personnel for JSTA's member agents.

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer’s Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of the most recent financial reports 0
- Analysis of the current budget and link with strategic plan 0
- Analysis of most recent audit 10
- Analysis of transparency of financial transactions, policies and reports 10
- Analysis of revenue and profit growth trend 0

Findings

Funding of JSTA is a major problem area. The lack of proper pricing of dues, fees for training, and non-dues revenue sources is because of philosophical problems. The board has not established the proper philosophy or progressive policies to accomplish sufficient revenue objectives.

Section Two

- Stability and diversification of level of funding (including non-dues income) 0
- Analysis of dues schedule 0
- Clearly written financial policies and procedures 0
- Strategy in place with specific revenue goals 0
- Overhead, personnel, and program costs are segregated 0

Section Three

- Analysis of automated financial and accounting processes 2.5
- Ability to manage grant funds 0
- Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements 2.5
- Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility 2.5
- Active financial audit committee at the board level 2.5
- Grant writing capability 0
- Number of staff assigned to help create revenue 0
- Staff compensated sufficiently for revenue generation activities 0
- Annual investment campaign conducted and goals met 0
- Cost of service to members calculated and utilized. 0

Findings

The fundamentals for proper financial management are in place. An additional calculation would be useful to the decision making process: the calculation the calculation of the costs of service for members. The costs of mailings, the costs of printing, the costs of staffing, etc, should be part of an overall cost of service figure that will allow the executive director to determine if each new member is making or costing the organization money.

Total Possible Points = 100

Total Points for Criterion 30

MAJOR CRITERION FINDING

Proper accounting practices have been institutionalized at JSTA. Reports and financial safeguards seem to be in place and transparency of financial transactions is common practice. Regular external audits are conducted. The problem is the lack of aggressiveness in developing revenues to meet the association’s potential aspirations.

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Central message answering question "what's in it for me?" 5
- Documentation of membership list 10
- Analysis of membership brochure 10
- Total number of current members & retention rate 10
- Membership directory 10

Findings

With a compulsory membership for Jordanian travel agents, an aggressive membership effort is unnecessary. Basic documentation has been developed, but very little marketing is underway at the present time.

Section Two

- Membership recruitment plan & system 5
- Total number of new members within the past year 2.5
- Estimate of the total number of potential members 5
- Percent of total potential members that are currently actual members 5
- New member orientation outline and handout material 0

Section Three

- List benefits of membership as opposed to listing only the programs and activities 2.5
- Formal orientation session for new members 0
- Committee preference cards sent annually to members 0
- New members immediately invited to serve on a committee 0
- Analysis of membership application 2.5
- Set targets for number of members to be acquired 0
- Non-dues income & strategy to promote member discounts 0
- Orientation handout materials 0
- Certificates and awards 2.5
- Other volunteer recognition devices 2.5

Findings

While some fundamental membership devices are in place, JSTA could improve its approach considerably by utilizing more professional techniques that have proved to work elsewhere.

Total Possible Points = 100

Total Points for Criterion 72.5

MAJOR CRITERION FINDING

Compulsory membership should be eliminated and JSTA should become a market-driven association that is forced to provide needed services and promote tourism in Jordan.

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*
Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.
 (0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)
Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.
 (0= No activity or factor) (5 = Outstanding activity or factor)
Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.
 (0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of core communication message 0
- Comprehensiveness of the communication plan relative to the strategic plan 0
- Analysis of professional communication staff 0
- Analysis of key target audiences 0
- Analysis of communication feedback mechanisms (assessment & tracking) 0

Section Two

- Communications that improve the BA's image, inform the public & increase membership 2.5
- Communication research with facts describing problems 2.5
- Analysis of writing for readership 0
- Correctly selected communication media 2.5
- Frequency of communication campaign 2.5

Section Three

- Communication plan that covers all parts of strategic plan 0
- Analysis of newsletter 0
- Analysis of magazine 0
- Analysis of action bulletins 0
- Analysis of program brochures 0
- Analysis of news releases and media kit 0
- Analysis of Web site or Web sites 1
- Existence of crisis management plan 0
- Executive awareness of importance of communication efforts 0
- Staff awareness of importance of communication efforts 0

Total Possible Points = 100 **Total Points for Criterion 11**

MAJOR CRITERION FINDING

Organizational philosophy, membership development, and communications are the weak links for JSTA. More time, money, manpower, and brainpower should be used in concentrating on how best to "tell Jordan's story to the world."

CRITERION NINE: GOVERNMENT AFFAIRS

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of public policies that prohibit job creation 5
- Analysis of obstacles to overcome to achieve economic growth 5
- Analysis of business association's adopted government policy positions 5
- Professional capabilities of government affairs staff 0
- Analysis of issue briefs produced by the business association 0

Findings

JSTA may be doing an effective job of advocating some changes in public policy that will help its members, but is not documenting its approaches or achievements.

Section Two

- Establishment of public policy advocacy committee 5
- Availability of staff to research legal and economic issues 0
- List of priority issues 0
- Analysis of research reports produced or authorized 0
- Analysis of reports to the board and the membership on government affairs activities 0

Section Three

- Analysis of business association's participation in anti-corruption program 0
- Analysis of government tax policies effect on business association's members 0
- Tracking proposals through the legislative process 0
- Testimony before public bodies on key issues 2.5
- Grass roots campaign efforts 0
- Coalition building efforts of association 2.5
- Understanding of the political dynamics of the nation 2.5
- Member education program on public policy 2.5
- Ability to build public support for government policy changes 0
- Ability to launch a letter writing campaign on key issues 0

Findings

There is little evidence that the wide variety of available advocacy techniques have been explored or utilized.

Total Possible Points = 100

Total Criterion Points 30

MAJOR CRITERION FINDING

In all fairness, JSTA has been a sounding board for the government and over the years has made several recommendations that have been adopted by the Ministry of Tourism. The time, however, has come to completely rethink JSTA's approach to influencing public policy.

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| CRITERION TEN: MANAGEMENT SYSTEMS AND USE OF INFORMATION TECHNOLOGY |
|--|

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rated the following factors on a sliding scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

(0= No activity or factor) (5 = Adequate activity or factor) (10 = Outstanding activity or factor)

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

(0= No activity or factor) (5 = Outstanding activity or factor)

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

(0= No activity or factor) (2.5 = Outstanding activity or factor)

Section One

- Analysis of overall information technology systems to streamline activities (i.e. Microsoft Project for planning, MS Outlook prompts, MS Access for databases to generate mailing lists, labels, etc) 0
- Executive computer and technology philosophy 5
- Staff computer efficiency and technical capabilities 5
- Operational policies & procedures manuals 0
- Documentation of record-keeping activities 5

Section Two

- Availability and utilization of database software 0
- Analysis of Web site(s) 2.5
- Analysis of forms used in accordance with Operational Policies & Procedure manual 0
- Analysis of specific system hardware 2.5
- Utilization of e-business capacity 0

Finding

A Web site with very minimal information has been installed on the Internet.

Section Three

- Study of e-mail utilization 0
- Analysis of written communications – business letters brochures, faxes, e-mails, etc. 2.5
- Analysis of networking capabilities 0
- Utilization of fax machine networks 2.5
- Analysis of printing capabilities 2.5
- Analysis of copying capabilities 2.5
- Analysis of scanning capabilities 0
- Assessment of desktop publishing capabilities 0
- Evidence of technology upgrade awareness 0
- Evidence of technology upgrade plans 0

Findings

Though JSTA is a technology driven organization in its training program, it has not carried that technology over into its programming. Upgrades are in order and seeking new ways to utilize existing and future technology should be on the management's agenda.

Total Possible Points = 100

Total Points for Criterion 30

MAJOR CRITERION FINDING

JSTA has insufficient management systems, information technology, and hardware capacity in place to accomplish its existing mission and objectives.

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|---------------------------------|
| SUMMARY SHEET FOR POINTS |
|---------------------------------|

| | |
|---|------------------|
| Criterion One: Mission, Objectives, and Documents | Points 45 |
| Criterion Two: Governing Body, Officers, and Directors | Points 73 |
| Criterion Three: Organizational Structures | Points 63 |
| Criterion Four: Programs, Services, and Activities | Points 43 |
| Criterion Five: Association Staff | Points 43 |
| Criterion Six: Financial Planning and Reporting | Points 30 |
| Criterion Seven: Membership Development and Recruiting | Points 73 |
| Criterion Eight: Communications and Public Relations | Points 11 |
| Criterion Nine: Government Affairs | Points 30 |
| Criterion Ten: Management Systems & Information Technology | Points 30 |
| Total Criteria Points | 441 |

| |
|---|
| <p>FORMULA: Total Criteria Points divided by 1000 equals percentage score. $441/1000 = .441/100 = 44\%$</p> |
|---|

Jordan Society of Tourists & Travel Agents

COMPARATIVE RATIO SCORE 44%

Certification Statement

Therefore, the Jordan Society of Tourists & Travel Agents, a business association received a 44 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview: 3/12/02

Name of the Interviewer: Larry Milner, CAE

APPENDIX ONE
BUSINESS ASSOCIATION DIAGNOSTIC GUIDELINE
STRATEGY AND METHODOLOGY

BUSINESS ASSOCIATION DIAGNOSTIC GUIDELINE STRATEGY AND METHODOLOGY

Business associations will be diagnosed based on their primary mission of (a) advocating improvement of public policies; (b) developing industry standards or codes of conduct for their members; and/or (c) promoting members' economic expansion. This diagnostic tool uses ten criteria for organizational success. Each criterion will compare an association to an international model to determine if it meets standards set by the model. The term association in this document includes business associations, chambers of commerce, professional societies, nonprofit and nongovernmental organizations. Though some of the model's management principles have been developed over many decades from efforts of the U.S. Chamber of Commerce³ and the American Society of Association Executives⁴, this international model has been designed to apply to organizations throughout the world.

BUSINESS ASSOCIATION ORGANIZATIONAL CRITERIA

Criterion One: Mission, objectives, and documentation

Criterion Two: Governing body, officers, and directors

Criterion Three: Organizational structures and documents

Criterion Four: Programs and services

Criterion Five: Association staff

Criterion Six: Financial planning and reporting

Criterion Seven: Membership development and retention

Criterion Eight: Communications and public relations

Criterion Nine: Government affairs

Criterion Ten: Management systems and use of information technology

CRITERIA INDICATORS

To determine if an association meets the model's standards, certain organizational **FACTORS** for each criterion will be measured. The **FACTORS** are based on (1) documentation of fundamental functions; (2) answers to key structural and operational questions; and (3) descriptions of major activities. Each **FACTOR** has been given a numerical value. The scoring of the **FACTOR** will be based on achieving standard management criteria.

RATINGS

Each of the ten **BUSINESS ASSOCIATION ORGANIZATIONAL CRITERION** listed above is divided into three sections. Each section is prioritized and weighted in order of *importance to the success* of the organization being studied.

The ratings in Section One of each Criterion are based on a **SLIDING SCALE OF 0 TO 10** (0 = non-existent or lowest rating and 10 = excellent or highest rating).

The ratings in Section Two of each Criterion are based on a **SLIDING SCALE OF 0 TO 5** (0 = non-existent or lowest rating and 5 = excellent or highest rating).

The ratings in Section Three of each Criterion are based on a **SLIDING SCALE OF 0 TO 2.5** (0 = non-existent or lowest rating and 2.5 = excellent or highest rating).

³ The Accreditation Program of the U.S. Chamber of Commerce: A Guide to Organization Analysis and Evaluation, U.S. Chamber of Commerce, 1998.

⁴ Peer Review Program, American Society of Association Executives Association, 1998.

Judgments for ratings on these scales will be based on these values—qualities, quantities, results, membership acceptance, refinements, completeness, and/or value to the overall mission of the organization.

COMPARATIVE RATIO SCORE

The final comparative ratio is an indication of the strength of an association compared to the ideal international model. The assessment points will be added, then divided by 1000—the total number of possible points—to arrive at a percentage score. For example: an association may have criteria ratings adding to 780 points out of a possible 1000. Using the Summary Sheet formula such a rating illustrates that the association has met 78 percent of the ideal standards when compared to the international model association of 100 percent.

IMPORTANT NOTE TO INTERVIEWER

Instead of constantly repeating verbiage, please add “action verbs” and details where appropriate to each factor. For example: “Vision Statement” is the first factor in Criterion One, Section One. The interviewer should “Analyze the vision statement for clarity and quality,” Therefore, the interviewers should “*study, analyze, determine, assess, explore, understand, and/or identify*” each of the factors.

APPENDIX TWO

BUSINESS ASSOCIATION DIAGNOSTIC GUIDELINE BLANK QUESTIONNAIRE

Report For Business Association

LOE/F/Diagnostic Assessment Phase 1
Developed
For
Ibrahim Osta, BAI Leader
for
The AMIR-Jordan Project
of
Chemonics International
and
The Center for International Private Enterprise

By
Larry S. Milner, CAE
AMIR II Consultant
Amman, Jordan

March 2002

INFORMATION ON THE BUSINESS ASSOCIATION

Business Association name:

Address:

Telephone:

Fax:

Email:

Name of Chief Volunteer:

Title:

Name of Chief Paid Executive:

Title:

Date of Organization's Founding:

Budget Size:

Budget In USD:

1. Describe the extent to which your association actively conducts programs or activities aimed at advocating changes in national, regional, and local public policies.
2. Describe the extent to which your association actively develops industry standards or codes of conduct for association members,
3. Does your organization conduct programs directly benefiting your members (seminars, trade leads, legal advice, etc.)?
4. Additional comments and observations by interviewer

CRITERION ONE: MISSION, OBJECTIVES AND DOCUMENTS

Purpose of Criterion One: *To assess the fundamental philosophy and focus of the association from the viewpoint of the organization's volunteer and professional leaders.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion One is 100 points

Section One

1. Vision Statement
2. Mission statement
3. Bylaws and charter
4. Membership needs assessment
5. Comprehensive strategic plan

Section Two

6. Objectives
7. Integrated Action Plans
8. Performance Audit
9. Minutes of Board Meetings, Executive Committee Minutes, and Minutes for Committees
10. Annual Report to Members on Results of Action Plans

Section Three

11. Understanding of the macro environment of nation
12. Understanding of the industry environment in nation
13. Understanding of the competitive environment
14. Business association's internal environment or culture
15. Understanding of the strengths of the business association
16. Understanding of the weaknesses of the business association
17. Understanding of the opportunities of the business association
18. Understanding of the threats to the business association
19. Contingency planning
20. Documentation of implementation of action plans

ADD YOUR TOTAL POINTS

Total Possible Points = 100

CRITERION TWO: GOVERNING BODY, OFFICERS, AND DIRECTORS

Purpose of Criterion Two: *To assess the structure and efficiency of organization's governing body.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Two is 100 points

Section One

1. Effective bylaws/constitution
2. Commitment of officers to association (time & resources)
3. Decision making capabilities and willingness of board
4. Avoidance of micromanagement by the board
5. Volunteer officers' background / industry positions held by officers

Section Two

6. Attendance at general membership meetings
7. Community position of officers & relevant educational background
8. Officer-orientation plan, training and association material
9. Job descriptions for officers and directors
10. Term limits of officers

Section Three

11. Staggered terms for officers
12. Board culture
13. Board procedures
14. Board agendas
15. Board reports
16. General membership meeting
17. Proper agendas for strategic planning, brainstorming, administrative, and project planning meetings
18. Attendance at board meetings
19. Length of board meetings
20. Participation of all directors in board meetings

Total Points for Criterion

Total Possible Points = 100

CRITERION THREE: ORGANIZATIONAL STRUCTURE

Purpose of Criterion Three: *To assess the organization's adherence to sound management principles.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Three is 100 points

Section One:

1. Analysis of appropriateness and effectiveness of department/division structures
2. Regular board meetings
3. Minutes of board meetings
4. Staff understanding of and support to structure of organization
5. Well-defined decision-making process

Section Two

6. Published organizational chart
7. Regular committee meetings
8. Minutes of committee meetings
9. Relationships between board and members
10. Relationships between board and staff

Section Three

11. Number of standing committees
12. Number of special task forces, ad hoc groups, and number/description of affiliate groups
13. Staff exposure to the board
14. Documentation of committee structure
15. Staff assignments to manage board functions & committees
16. Committee orientation plan and materials
17. Documentation of committee reports
18. Analysis of committee chairs
19. Lists of board and committee members
20. Committee chair and member orientation materials

Total Points for Criterion
Total Possible Points = 100

CRITERION FOUR: PROGRAMS AND ACTIVITIES

Purpose of Criterion Four: *To analyze the details of the organization's programs and activities to determine the effectiveness of the association's planning and programming process.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Four is 100 points

Section One

1. Analysis of major focus of Program of Work
2. Explanation of the Program of Work's superordinate goal
3. Analysis of specific goals of Program of Work
4. Identification of measurements of success
5. Analysis of results of previous time period

Section Two

6. Achievability of stated goals
7. Available manpower and monetary resources
8. Length of time for tangible achievements & realistic deadlines for results
9. Documentation of programs and plans in annual reports
10. Commitment to planning process

Section Three

11. Measurement of involvement of stakeholders in planning process
12. Coordination between fiscal planning and program planning
13. Coordination between programming committees
14. Coordination between programming staffs
15. Coordination and cooperation between programming and administrative staffs
16. Organization culture for achievement and results
17. Documentation of programs and plans in brochures
18. Explanation of programs in newsletters
19. Documentation of programs in bulletins
20. Documentation of products and services

Total Points for Criterion
Total Possible Points = 100

CRITERION FIVE: ASSOCIATION STAFF

Purpose of Criterion Five: *To understand the organization's mission and approach from the association's employee's viewpoints:*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Five is 100 points.

Section One

1. Analysis of professional staff
2. Relevant experience of executive staff
3. Key staff shares vision and mission of the board of directors
4. Relevant and useful Personnel Procedures Manual (containing a salary scale)
5. Job description of executive staff

Section Two

6. Relevant experience of program staff
7. Relevant experience of administrative staff
8. Analysis of performance evaluation form
9. Regularity of staff meetings
10. Documentation of names, positions, and résumés of the staff

Section Three

11. Analysis of staff hiring & retention policies
12. Regularity of staff updates of key stakeholders and members
13. Analysis of job application form
14. Employee time sheet for programming records
15. Job descriptions of programming staff
16. Job descriptions of administrative staff
17. Comparative salary analysis
18. Performance bonus plan
19. Staff retention rate
20. Staff awareness of importance of programming and financial success of organization

Total Points for Criterion
Total Possible Points = 100

CRITERION SIX: FINANCIAL PLANNING AND REPORTING

Purpose of Criterion Six: *To assess the financial stability of the association.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Six is 100 points

Section One

1. Analysis of the most recent financial reports
2. Analysis of the current budget and link with strategic plan
3. Analysis of most recent audit
4. Analysis of transparency of financial transactions, policies and reports
5. Analysis of revenue and profit growth trend

Section Two

6. Stability and diversification of level of funding (including non-dues income)
7. Analysis of dues schedule
8. Clearly written financial policies and procedures
9. Strategy in place with specific revenue goals
10. Overhead and program costs are segregated

Section Three

11. Analysis of automated financial and accounting processes
12. Ability to manage grant funds
13. Financial reporting according to national laws, accounting conventions, organization bylaws, and donor requirements
14. Board members' job description highlights fiduciary responsibility & members receive orientation in fiduciary responsibility
15. Active financial audit committee at the board level
16. Grant writing capability
17. Number of staff assigned to help create revenue
18. Staff compensated sufficiently for revenue generation activities
19. Annual investment campaign conducted and goals met
20. Cost of service to members calculated and utilized.

Total Points for Criterion
Total Possible Points = 100

CRITERION SEVEN: MEMBERSHIP RECRUITMENT

Purpose of Criterion Seven: *To assess how the association attracts and keeps members.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Seven is 100 points

Section One

1. Central message answering question "what's in it for me?"
2. Documentation of membership list
3. Analysis of membership brochure
4. Total number of current members & retention rate
5. Membership directory

Section Two

6. Membership recruitment plan & system
7. Total number of new members within the past year
8. Estimate of the total number of potential members
9. Percent of total potential members that are currently actual members
10. New member orientation outline and handout material

Section Three

11. List the benefits of becoming a member of the association as opposed to listing only the programs and activities
12. Formal orientation session for new members
13. Committee preference cards sent annually to members
14. New members immediately invited to serve on a committee
15. Analysis of membership application
16. Set targets for number of members to be acquired
17. Non-dues sources of income & strategy to promote programs, products and services to members for discounts
18. Orientation handout materials
19. Certificates and awards
20. Other volunteer recognition devices

Total Points for Criterion
Total Possible Points = 100

CRITERION EIGHT: COMMUNICATION & PUBLIC RELATIONS

Purpose of Criterion Eight: *To assess the association's communication and public relation capabilities.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Eight is 100 points

Section One

1. Analysis of core communication message
2. Comprehensiveness of the communication plan relative to the strategic plan
3. Analysis of professional communication staff
4. Analysis of key target audiences
5. Analysis of communication feedback mechanisms (assessment & tracking)

Section Two

6. Communications that improve the BA's image, inform the public & increase membership
7. Communication research with facts describing problems
8. Analysis of writing for readership
9. Correctly selected communication media
10. Frequency of communication campaign

Section Three

11. Communication plan that covers all parts of strategic plan
12. Analysis of newsletter
13. Analysis of magazine
14. Analysis of action bulletins
15. Analysis of program brochures
16. Analysis of news releases and media kit
17. Analysis of Web site or Web sites
18. Existence of crisis management plan
19. Executive awareness of importance of communication efforts
20. Staff awareness of importance of communication efforts

Total Points for Criterion
Total Possible Points = 100

| |
|---|
| CRITERION NINE: GOVERNMENT AFFAIRS |
|---|

Purpose of Criterion Nine: *To assess the levels of competence and sophistication of the association's government affairs program.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Nine is 100 points.

Section One

1. Analysis of public policies that prohibit job creation
2. Analysis of obstacles to overcome to achieve economic growth
3. Analysis of business association's adopted government policy positions
4. Professional capabilities of government affairs staff
5. Analysis of issue briefs produced by the business association

Section Two

6. Establishment of public policy advocacy committee
7. Availability of staff to research legal and economic issues
8. List of priority issues
9. Analysis of research reports produced or authorized
10. Analysis of reports to the board and the membership on government affairs activities

Section Three

11. Analysis of business association's participation in anti-corruption program
12. Analysis of government tax policies effect on business association's members
13. Tracking proposals through the legislative process
14. Testimony before public bodies on key issues
15. Grass roots campaign efforts
16. Coalition building efforts of association
17. Understanding of the political dynamics of the nation
18. Member education program on public policy
19. Ability to build public support for government policy changes
20. Ability to launch a letter writing campaign on key issues

TOTAL POINTS

Total Possible Points = 100

| |
|---|
| <p style="text-align: center;">CRITERION TEN: MANAGEMENT SYSTEMS AND USE OF INFORMATION TECHNOLOGY</p> |
|---|

Purpose of Criterion Ten: *To assess the association's management systems, information technology, and hardware capacity.*

SCORING FACTORS: *Interviewer's Action: Rate the following factors on a **sliding** scale.*

Section One - each factor can be worth from 0 to 10 points for a possible total of 50 points.

Section Two - each factor can be worth from 0 to 5 points for a possible total of 25 points.

Section Three - each factor can be worth from 0 to 2.5 points for a possible total of 25 points.

The total possible score for Criterion Ten is 100 points

Section One

1. Analysis of overall information technology systems to streamline activities (i.e. using Microsoft Project for the work plan, using MS Outlook prompts, using MS Access for a member database to generate mailing lists, labels, etc)
2. Executive computer and technology philosophy
3. Staff computer efficiency and technical capabilities
4. Operational policies & procedures manuals
5. Documentation of record-keeping activities

Section Two

5. Availability and utilization of database software
6. Analysis of Web site(s)
7. Analysis of forms used in accordance with Operational Policies & Procedure manual
8. Analysis of specific system hardware
9. Utilization of e-business capacity

Section Three

10. Study of e-mail utilization
11. Analysis of written communications – business letters, brochures, faxes, e-mails, etc.
12. Analysis of networking capabilities
13. Utilization of fax machine networks
14. Analysis of printing capabilities
15. Analysis of copying capabilities
16. Analysis of scanning capabilities
17. Assessment of desktop publishing capabilities
18. Evidence of technology upgrade awareness
19. Evidence of technology upgrade plans

**Total Points for Criterion
Total Possible Points = 100**

SUMMARY SHEET FOR POINTS

| | |
|---|---------------|
| Criterion One: Mission, Objectives, and Documents | Points |
| Criterion Two: Governing body, Officers, and Directors | Points |
| Criterion Three: Organizational Structures | Points |
| Criterion Four: Programs, Services, and Activities | Points |
| Criterion Five: Association Staff | Points |
| Criterion Six: Financial Planning and Reporting | Points |
| Criterion Seven: Membership Development and Recruiting | Points |
| Criterion Eight: Communications and Public Relations | Points |
| Criterion Nine: Government Affairs | Points |
| Criterion Ten: Management Systems & Information Technology | Points |

Total Criteria Points

FORMULA:
Total Criteria Points divided by 1000 equals
percentage score. $/1000 = /100 = \%$

COMPARATIVE RATIO SCORE %

Certification Statement

Therefore, the _____, a business association received a 77 percentage score, which illustrates that the association has met that percentage of standards when compared to an international model association of 100 percent.

Date of interview:

Name of the Interviewer:

