

## **Chamber U Task Force Report to the Board August 2014**

### **Task Force Members:**

Deb McClelland (Chair), Lynda Moffat, Lisa Kowalchuk, Bruno-Serge Boucher, Robin Bobocel

### **Mandate:**

To review and recommend to the board CCEC's role in the development of a formalized certification/training program for Chamber executives.

### **Responsibilities:**

- Review findings from 2013 CCEC membership survey
- Develop inventory of existing Chamber professional development programs
- Review professional development programs offered by other associations e.g. CSAE
- Review materials available under former CIOM program
- Make recommendation to Board for next steps

### **Executive Summary**

Work was done in researching available programs and considering what role CCEC should play in further professional development programming. Committee findings to date are that:

1. CCEC survey suggests there is an interest in more professional development offerings
2. We do not wish to duplicate what is already available.
3. There are other professional development options already available – notably CSAE and in the U.S.
4. Given CCEC's current mode of operating, it would be difficult to launch our own professional development programming (.25 staffing)
5. Information on the previous CIOM suggests that it was not sustainable on customer base of Chambers (and that was with full time staff managing)
6. Chamber budgets are such that there would be a limited market that could afford to travel and attend. (Most week long type courses are \$1000+, in addition to travel and accommodations)
7. Programming would likely be more successful and have greater reach if it were attached to existing provincial conferences rather than creating separate national events e.g. develop a program and send trainers to existing events
8. Opportunities for CCEC members to tap into existing offerings, perhaps at preferred rates, should be explored – e.g. with ACCE, FCCQ, CSAE
9. CCEC's role should be to be a central resource on available professional development opportunities rather than creating a new program – CCEC website could include a section with links to resource materials, events, courses etc. We might also do a webinar on existing programs with speakers who have completed them – e.g. CSAE – Jennifer Hagen, CCE – Todd Letts, FCCQ

## Inputs to Task Force Review

### 2013 CCEC Membership Survey

The survey asked members questions about professional development programming and CCEC and based on 69 respondents, the findings were:

- If CCEC were to offer a multi-module training program for Chamber executives, 87% of members said that they would be interested in participating and 43% said they would be interested in their staff participating
- In terms of training format,
  - 59% - In person on site training with Chamber peers
  - 55% - Webinar (self-study)
  - 42% - Webinar (scheduled sessions)
  - 7% - no preference
  - 16% - Other
- For those who have an interest in onsite training, 57% said they would like to see it as an add-on to the CCEC conference and 74% said a stand-alone event. The most popular length was 2 days as an add-on and 2 to 3 days as a stand-alone
- If on site 90%+ would attend in own province but it drops to 50% if there was a need to travel out of province

Average annual professional development budget per eligible staff person is:

15% - less than \$500

31% - \$501 to \$1000

36% - \$1001to \$3000

13% - \$3001 to \$5000

5% - \$5001

In conclusion, there is an interest in more professional development, both webinar and in person, with twice the expected participation if offered in home province.

With interest from the membership, the Task Force looked at options for programming and started by looking at what other programs are currently being offered or have been offered in the past.

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The following pages include an outline of programs reviewed

1. FCCQ
  - 8 day classroom program for Chamber managers
  - online governance program for Chamber volunteers
2. CSAE
  - 5 module online learning program leading to CAE designation
  - Association Essentials online course for early to mid level association managers
3. CIOM – 1 week classroom program with 4 levels offered from 1970s to 2000
4. US Chamber of Commerce – similar to CIOM offered in U.S.
5. ACCE – CCE designation – assessment of capabilities / Chamber 101-8 on-line modules/ Chamber university

## Chamber Education

### Inventory of Existing Programs

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#### FCCQ

FCCQ has recently introduced a classroom program in two 4 day blocks, typically about 20 people, to provide a foundation in Chamber management, covering a number of different modules. A certificate of completion or participation is offered depending on satisfactory exam results. Each module is designed and delivered by those familiar with the realities of Chambers of Commerce.

The first 4 day block includes:

- Understanding the Regional Economy
- Strategic Planning
- Human Resources
- Communications (Media Relations)
- Sponsorships and Partnerships
- Ethical Conduct
- Public Affairs/Lobbying

The second block includes:

- Customer service
- Mobilizing economic development in the region
- The value proposition
- Financial reporting and NPOs
- Event Organization
- Protocol
- Chambers in Quebec and FCCQ

The fees are \$1600 for the 2 blocks and includes tuition and course materials. Accommodations are additional at about \$150 per night.

FCCQ has also developed an online course for volunteers, consisting of 6 modules covering governance issues. Participation fees are \$150 for all or \$35 each, available in English.

- Course 1 : Introduction to Governance
- Course 2 : Directors' Roles and Responsibilities
- Course 3 : Ethics and Code of Conduct
- Course 4 : The Legislative Framework and Legal Responsibility
- Course 5 : The Accounting Environment and Risk Management
- Course 6 : The Board Meeting

More info: <http://www.fccqformation.ca/formation-la-gouvernance-ANG.php>

## CSAE

### CAE program

5 module on-line learning program - \$700 to \$800 per course, about \$4000 to complete the program/attain certification

- CAE 100 - Association Leadership, Change, Strategy & Structure
- CAE 200 - Association Membership Services
- CAE 300 - Association Operations I (Operations Support)
- CAE 400 - Association Operations II (Products & Services)
- CAE 500 - Developments in Association Management

Recommended for mid-level to senior executives

There is a PLAR (Prior Learning Assessment Recognition) component (if you have 10 years experience, submit a portfolio, are assessed by a panel) – possible to receive full accreditation or exemption from certain courses). In addition to online courses, there is an online certification exam (based on 44 Not-for-Profit Management Competencies). Most students take about 2 years, maximum allowed is 7. Terms are 12 weeks long, and a student typically spends 10-12 hours each week on the course. The Exam is offered 3 times per year (Jan, May, Aug) and is written after all 5 courses are completed.

Jennifer Hagen has completed her CAE and has the following observations:

#### 1. What's your assessment of the CAE?

CAE is a good grounding in the essentials of association management; the principles learned are all applicable to sound chamber management; the advantage is that it is all offered online and can be accessed from anywhere.

#### 2. How applicable do you think it is to Chamber management? Very.

If I look at the current offering of courses (leadership – change, strategy, structure); membership services; operations – everything from accounting to computers, etc; operations – programs and services; and developments in association management (this changes all the time and is sort of a moving target as associations change.) These are all applicable – and, to a certain extent, a chamber manager could add to their learning by doing their assignments related to their own chamber situation

#### 3. How did it work? – On-line courses? Any on-site like FCCQ? Nothing on site. There were online discussion forums. Do you work at your own speed or is there a set schedule for each course offering? (you work at your own speed within the course – respecting that there are deadlines and assignments due)

#### 4. Costs - For CSAE members its \$699; non-members pay \$799 plus applicable taxes. There is also a textbook. It takes a couple of years too just because the courses aren't offered

continuously – fall, winter and spring semesters. It's expensive but it has become the recognized association designation; they have a critical mass now. You can even spot the ask for a CAE in job ads. To me this is something that people were always asking out of training, that it lead to something... that they could either use within the chamber world, or if they wanted to go beyond chambers in their professional life. If people put time and effort into a program, they want a piece of paper (maybe not necessarily initials... ) something to hang on the wall.

To keep your CAE, you need to become and stay a member of CSAE once designated.

For further details, see:

<http://www.csae.com/CoursesEvents/Courses/CAEProfessionalCertificationCourses/CAEProgram.aspx>

[http://www.csae.com/Portals/0/media/CAE/CAE Brochure Registration%20Form 2012.pdf](http://www.csae.com/Portals/0/media/CAE/CAE%20Brochure%20Registration%20Form%202012.pdf)

### **Associations Essentials course**

For early to mid-level executives

On-line, 10 weeks, \$600 to \$700 per course

#### **Courses Offered:**

- Foundations of Association Operations
- Membership Concepts & Fundamentals
- Revenue Generation & Marketing
- Communication & Interpersonal Dynamics
- Managing Association Resources
- Essentials of Association Finance & Planning

For further information:

<http://www.csae.com/CoursesEvents/Courses/AssociationEssentialsCourses.aspx>

## CIOM History

As per discussion with Roger Stanion, February 17, 2014

1. How/when did it start? How many years did it operate? How did it evolve?
2. Program content – what was included / how did it work / topics covered / program speakers / was it multi-step – are any materials still available / relevant
3. Fees
4. Venues
5. Supply and demand for the program – how did you decide who attended / #s accommodated
6. What were the successes and shortcomings of the program?
7. Why did it end?
8. What do you think would be needed for successful re-launch?
  - Began in 50s as seminar for major chambers, organized by CCC, was an opportunity for Chambers to get together and promote CCC services and programs
  - Other major associations were interested – manufacturers, bankers, railway, some asked if they could participate, as well as affiliated programs like JA which the CCC had recently started
  - Started calling the program Canadian Institute of Organizational Management instead of Chamber Management
  - By 1970, it was simply known as The Institute and all new managers were obliged to attend
  - 1970s – moved into university environment, instructors were managers from CCC
  - The student body included tourism organizations, JA, chambers
  - Was run Monday to Friday with a 2 to 3 hour exam on Friday afternoon that was graded.
  - It was run by an assistant GM at CCC who was known as the dean and ruled the operation
  - 1971 was the first year that Roger attended – conducting a 1<sup>st</sup> year course on public affairs and he was involved in the 70s as a lecturer
  - In 1979, Roger assumed responsibility for CIOM. He spent a week dreaming about the way it could be and changed the current model
  - Concluded that the customer base had to be larger than Chamber managers.
  - Made agreement with CSAE for credits to be allowed for attending CIOM
  - At this point, there was support from CEO, BCCE, CCEC and BC government which at the time was propping up BC Chambers, tourism organizations and there was a connection with Caribbean Chambers and SEDA. The sell was to promote better trained Chamber managers that would stay in the business and on that point, it was successful. Scholarships were made available from the executive organizations.
  - Revenues had to be developed. Sponsorships were developed (some in-kind) FBDB small business week would buy one dinner, have a chance to speak.

- Faculty needed to be changed. CCC department managers were no longer used as teachers. One person that had been involved from Laurentian understood the program and recommended academics.
- a curriculum committee was developed with reps from CCEC, IAE, CCC
- Exams were eliminated – was a downer to have this great week and then conclude with an exam that also created extra work within the program. Instead, participants were asked to complete a written evaluation form instead, rating presenters. Those evaluations were taken as the basis for the curriculum committee and lecturers that did not rate well were not invited back
- A gathering place with an open door was introduced and it was the opportunity for one on one personal interaction that made the program successful
- These changes coincided with Chamber management becoming a predominately female job
- The program was kept at Western with a room and board arrangement with rooms and meals for Sunday to Friday and most would also stay over until Sat.
- In mid 80s, revamped program to respond to those that had attended before and still wanted to go
- 1<sup>st</sup> year – chamber basics - membership, board relations, government relations, 1 day units, mostly lecture, example of team exercise would be work on running a mock press conference
- 2<sup>nd</sup> year – leadership and management style – games, tests, myers briggs, conflict resolution, getting to know yourself, very participatory
- 3<sup>rd</sup> year – long range planning which was a weakness at the time, worked out over 2 to 3 years, week long team exercise, e.g. create mission statement for association that didn't currently exist
- In the early 90s – those that had taken the 3 years, were looking for a 4<sup>th</sup>. All have different needs by this point. They went to graduates of 3 years and asked what are their biggest problems – and that led to a changing 4<sup>th</sup> level each year based on polling of previous graduates, with 5 one day units based on interests they had voted on. Profs might come from U.S. Chamber or ACCE.
- Current managers who have participated – Debbi Nicholson, Bob Hammersley, Lynn Whitehouse - they may have binders with all the materials.
- As time went by, it became clear that the program was producing no revenue for CCC – had CCC not underwritten it, it would not have survived, - they were annually sending 3 to 4 new hires, plus staff people organizing it.
- Budget was based on 120 participants – students and faculty all staying in residence
- Once CCC looked at full cost accounting basis for programs, it was shown that CIOM was losing \$10,000 to \$20,000 per year – based on the staff time for Roger and Linda Robert throughout the year plus spending 7 to 8 days in London.

- CCC was carrying all the risk and wouldn't know until March/April what the participation level would be for the June program. Chambers were asked to prove the strength of their commitment and had to send in their registration in January for June program. Recollection is that one more ran in June 2000 and then it died a quiet death.
- Key Issues:
  - What is the market (what made it possible other than CCC money was expanding the market – had 8 managers from Caribbean, 9 from south Pacific, other associations, war amps)
  - What is the product offering - instruction, does it include room and board?
  - What price is market willing to bear? Where can you find low cost venue?
  - Can you afford to pay somebody to produce it for you?
  - Can you find sponsorships to defray cost?
  - Is someone prepared to take a financial bath for 2 years to make a go of it? (The memories out there are from the 80s when it was a successful entity with a 4 level program)
  - Need allies to expand participant base and generate revenue
  - Program cannot be replicated through distant learning, the success from the program was learning from each other (look at it as an expanded version of CCEC conference)
- Note – as program became more popular, participants from the west wanted to see it offered in their region given the travel costs they were bearing vs ON participants. Tried one year running in AB, didn't fly. Wasn't sufficient base and those from ON did not attend
- ON would have been 50% of student body typically
- Fees at time would have been about \$1100 for room/board/program (travel extra). Of that \$500 to \$600 would go to university for room & board, the rest to faculty (about \$20,000)
- If in business less than 2 to 3 years, enrolled in first level, 3+ years in 2<sup>nd</sup> level, there would be drop off between 2<sup>nd</sup> and 3<sup>rd</sup> year. Years 1 and 4 would have largest attendance
- It became the thing to do – when you went to BCCE or OCC, everyone would be talking about what they learned at CIOM

## US Chamber of Commerce

<http://institute.uschamber.com/about/>

4 year in person course for one week, probably like CIOM, cost about \$2500 per year for course and hotel, travel in addition, offered in 5 locations across the U.S.

Graduates of the four-year Institute for Organization Management program receive the [IOM Graduate Recognition](#), signifying 96 hours of course instruction in nonprofit management.

Additionally, the curriculum is tied to the CAE and CCE bodies of knowledge, allowing participants to earn credit for an industry certification in one simple step.

## ACCE

**Certified Chamber Executive** <http://www.acce.org/cce/certified-chamber-executive-cce/>

Applicants are required to have 6 years experience with certain responsibilities, and submit a detailed application with points assigned based on achievements, and also to include documents such as financial statements, chamber strategic plan, annual reports, organization chart, as well as an essay. They are then evaluated in an interview. Those then eligible, write a 4 to 6 hour exam. So it is an assessment of current capabilities, no training.

Fee of \$400 for members and \$600 for non-members,

Current CCEC member with this designation include Todd Letts.

### ACCE University

<http://secure.acce.org/ac/index.php?src=gendocs&ref=eLearning>

### Chamber 101

[http://www.acce.org/acce-store/acce-ecourse/chamber-101-introducing-the-work-of-chambers-of-commerce/?query=category.eq.ACCE%20Ecourse&back=bookstore\\_directory](http://www.acce.org/acce-store/acce-ecourse/chamber-101-introducing-the-work-of-chambers-of-commerce/?query=category.eq.ACCE%20Ecourse&back=bookstore_directory)

In this foundational 8-part eCourse series, *Chamber 101: Introducing the Work of Chambers of Commerce*, twelve chamber practitioners offer a broad stroke presentation that highlights the work of chambers. The new online course is designed to both work in tandem with chamber staff and board orientation programming, while offering a flexible training tool that can be incorporated into any chamber retreat, lunch-n-learn or training activity. Online course modules include:

Cost: \$69 - \$399

*Pricing is tiered by chamber staff size for 1 year of unlimited access*

- Module 1: Background & History of Chambers of Commerce

- Module 2: Understanding Chambers of Commerce
- Module 3: Membership Services
- Module 4: Communication & Marketing
- Module 5: Government Relations
- Module 6: Education & Workforce Development
- Module 7: Finance & Administration
- Module Eight: Economic Development

### **College of the Rockies - BC**

Currently considering developing an online program in Chamber management. Working with BCCE to develop a core competencies list.

### **BCCE**

In 2007, BCCE commissioned a report called Best in the West on Chamber management training which provides very good background information and a plan for new programming – which includes think tanks, videoconference training, professional development conference, individual Chamber training through mentorship. A budget of \$200,000 was developed and included \$60,000 for a full time program director. While the report still has value as reference, BCCE did not have the resources or capacity to proceed.