

From the CEO

The New and Improved CSA

By *Barbara Baldwin, M.P.H.*,
CSA Chief Executive Officer

In July 2004, the CSA Board approved a plan to reorganize the CSA staff support structure to better to meet the long-range goals of the Society with regard to member service and development. An outside consultant, using the most up-to-date management theory, conducted the organization's review such that impartiality would be ensured.



We chose ChoicePoint for this task because of their expertise in organizational development and strategic planning. ChoicePoint examined the work presently done in the office as well as the work that needed to be done if the organization were to move forward. They reviewed the existing staff's skill set and outlined the expertise needed now and in the future. The assessment review model included direct input and oversight by the CEO so that the consultant clearly understood the CSA office's key functions, work processes, and products. This was necessary to assure our vision of making the CSA a state-of-the-art organization which is both effective and efficient, as well as to assure that members receive more value for their membership dollars—including needed services and products.

The consultant gathered information through interviews with each staff member, the Executive Committee and members of the Board of Directors. Staff and leadership feedback reflected on what worked well in the office, what needed improvement, how the Board related to the staff and what would move the CSA from being a good organization to a great one. ChoicePoint developed a report based on responses as well as observations as they related to non-profit corporations in general.

Some key findings included:

- Many responsibilities in the office were distributed according to who could absorb additional work rather than by grouping them by function.
- Too many staff were involved in various processes. This resulted in communication difficulties and misunderstandings as to who was responsible for what and who had ultimate accountability for ensuring that tasks were completed in a timely manner.
- The office lacked expertise in membership development, human resources/personnel management, advanced functions in Microsoft Office programs such as Word and Excel, and support for web-based functions like meeting registration, dues payment, and online CME.
- The CEO was not able to devote sufficient energy to leadership, governance and policy development because of day-to-day administrative demands.

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The reorganization plan was a roadmap to excellence with the goal of raising the office to new levels of member service in an increasingly challenging practice environment. Three positions were restructured and, using the functional model of organization, the remaining staff and the CEO worked until the end of 2004 refining job descriptions and beginning to improve processes. During the last quarter of 2004 the office operated with only four staff, which would not have been possible without the phenomenal efforts of Linda Risdon, Andrea de la Peña and Lesley Franco.

Two new positions were created: Meeting and Membership Coordinator and Chief Operations Officer, whose responsibilities also include membership development and retention. The last position of administrative assistant was redefined with many new responsibilities. All positions require expertise, education and skill levels necessary to take the CSA forward in developing and implementing new programs and benefits, as well as carrying on existing functions with efficiency and creativity.

Terrie Rowe joined the CSA staff in late January as Meeting and Membership Coordinator. Terrie has extensive experience in meeting management, member service, and newsletter production. She is fast learning the special characteristics of a medical specialty society and the ACCME requirements for CSA to maintain its certification as a Category 1 CME provider. Her enthusiasm and willingness to jump in to get things done add to the environment of teamwork.

In April 2005, Michael Whitelock joined the CSA as Chief Operations Officer. Michael came with many years of non-profit experience in operations, human resources, personnel management, and membership development. Coincidentally, his father was an anesthesiologist who practiced in New York. Michael oversees the day-to-day operations in the CSA office, including supervision of staff. He also is working closely with the CSA Resident Component. He is a great team leader and inspires staff on a daily basis to high levels of achievement.

The Executive Administrative Assistant position was recently filled by Faye Parks. Faye's responsibilities include being first contact for callers, receiving and formatting board reports and other documents, updating the member database and all other levels of CSA program support. Faye has strong skills in customer service, Microsoft Office programs and office administration.

Special recognition goes to the other CSA staff members who were the glue that held the office together during a very challenging transition. Linda Risdon is Operations Manager and her responsibilities include maintenance and enhancement of the membership database, information technology coordination, financial oversight, preparation of financial reports, and working with the ASA on its online membership application. Linda's attention to detail and affinity for crunching numbers make her a great asset to the CSA.

Andrea de la Peña is the Communications Specialist and serves as the Managing Editor of the *Bulletin*, providing both administrative oversight and editorial functions

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at the direction of the CSA Editor, Associate Editors and the CSA Editorial Board. She is also Webmaster and Listserv Administrator. Andrea has previously untapped talent in information development and presentation and now has more time to devote to the web site and to bolster the communication function of the CSA.

Lesley Franco is Operations Assistant. Lesley assists Linda with day-to-day accounting tasks, processes meeting registrations, dues and other incoming revenue. Her duties also include processing resident membership applications, tabulating and generating CME certificates, updating membership files and coordinating office machinery maintenance and repairs. Lesley is very enthusiastic in developing and learning new ways of carrying out tasks to increase efficiency.

How is the CEO's day spent? There is still the general oversight of the organization and strategic guidance. This includes building and improving relationships with staff at other organizations to produce benefits from collaborating on issues of common interest. Strengthening liaisons with staff at various governmental agencies such as the Division of Workers' Compensation and the CMS Regional Office is another core objective. In addition, it is necessary to work closely with Legal and Legislative Counsel to get information needed to develop and support the CSA's positions on issues such as balance-billing prohibitions. And not to forget, the CEO works with the President, the ASA Director from California, and other members of the Executive Committee and the Board to assist them in their duties, carry out directives and support the CSA's governance functions.

Thus far many changes are not visible to the casual observer, but several of them deserve mention. These include:

- Refining the online membership application and working with the ASA to accept electronic applications. The ASA has recognized the CSA system as the gold standard and used many of the CSA's suggestions and processes in structuring its online membership, which was unveiled a few months ago.
- Processing of applications was reduced from two to three weeks to two to three days.
- Implementation of the online nomination and election system.
- A PowerPoint member orientation to the CSA appears on the home page of the CSA Web Site to assist in member development and provide ready information about CSA to our current members.
- Weekly and biweekly e-mail reporting to ASA and CSA District Directors on member changes in status to enable timely contact with members.

Near-term goals of the CSA office include:

- Adding content to the web site, especially in the professional and practice area.

- Increasing the CSA's strength in numbers through a membership recruitment campaign.
- Recognizing that the residents are the future of the CSA. With this in mind, CSA has polled the resident component for their membership needs. Program development is underway to provide them with information related to preparation for entering practice.

The CSA office exists to support the governance structure and members. We are here to provide the membership with information and benefits that are valuable to individuals and the membership as a whole. If we do not know what you want, we can only provide an approximation of meaningful benefits. I invite members to send suggestions for new information and services as well as improvements to existing benefits to me at <bbaldwin@csahq.org>. The CSA cannot be all things to all people, but we are alert and nimble to respond to many of the member needs.

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