Pilot Resource Groups Implementation Calendar & Guide
Pilot Implementation: Beginning May 1, 2021 – April 30, 2022

Implementation Calendar

Quarter	Activities
May-July	• Committee Chair introductions to CRTF recommendations • Assignment of NCACPA staff • RG/NG Chair feedback session • FY22 Leadership Summit Event #1 • Committee/RG chairs to communicate with volunteers • Town Hall meeting to explain upcoming changes • Develop roles and responsibilities for RG • Confirm current FY events and activities • Draft term limits implementation plan
Aug-Oct	• Finalize term limits implementation plan • Draft FY 2022-23 action plan • Identify leadership for RG • RG/NG Chair feedback session • FY22 Leadership Summit Event #2 • Recruitment of volunteers
Nov-Jan	• Confirm leadership for RG • Confirm FY 2022-23 action plan • FY 2022-23 budget request • RG/NG Chair feedback session • FY22 Leadership Summit Event #3 • Recruitment of volunteers
Feb-April	• RG/NG Chair feedback session • FY23 Leadership Summit

Implementation Guide Overview

The following implementation guide provides additional details and clarity to each of the activities outlined in the Implementation Calendar. This implementation guide is to be used by all leaders and volunteers of committees/RGs, as well as the respective staff liaisons assigned.

May – July Activities

Committee Chair Introductions
- (May) The Committee Chairs will all be provided additional information on CRTF's efforts and recommendations. Special attention will be given to linking NCACPA's revision of its mission/vision statements to the findings/recommendations from the CRTF.

- The objective is to provide background information ahead of Leadership Summit Event #1 to create enhanced engagement and conversation.

Assignment of NCACPA Staff to RGs
- (May) Each RG will be assigned a lead NCACPA staff liaison and 1-2 co-staff liaison(s) to assist the RG. The role of the staff liaison is covered in greater detail within the Operating Procedures Manual.

RG/NG Chair Feedback Session
- (May) Chairs of the pilot groups will have periodic meetings with the Committee Restructure Task Force implementation groups to obtain their feedback on their experience as chair and the experience of their volunteers. Additionally, the implementation groups will help provide assistance as needed.

Leadership Summit Series (Event #1)
- (June) As a part of Leadership Summit Series, NCACPA's program will include an overview of trends and themes in the market and the linkage to NCACPA's efforts and strategic direction. The program will then pivot into two key initiatives: DEI and the committee restructuring.

- The objective is to provide additional discussion on the committee transition plan and engage the volunteer leadership in conversation to identify additional issues, concerns, positives, etc., which will be used in discussions with committees and association-wide.

Committee/RG Chairs to Communicate with Volunteers
- (June) Post Leadership Summit Event #1, committee chairs will be asked to set up a meeting before the end of June with their respective committees to provide them with an understanding of why, what, how and when the committee structure within NCACPA will be transitioning.

- The objective is to increase the awareness to all volunteers and address or compile frequently asked questions ahead of a town hall for leadership to address, and answer questions from, the volunteers.

Town Hall Meeting to Explain Upcoming Changes
- (July) Committee chairs and volunteers will be invited to attend a Town Hall designed to reiterate key points of the committee restructure process and answer questions from committee volunteers derived from prior meetings.

- The objective is to provide clarification, explanations, and details, as necessary, to clear the path for effective change management in the committee area.

Develop Roles and Responsibilities for RG
- (June/July) The roles and responsibilities of the RG are outlined in the Operating Procedures Manual. The Committee will use this as its target through the transition phase in creating an action plan, activities and identifying volunteers.

Confirm current FY Events and Activities
- (June/July) The committee will work to confirm their 2021-22 (FY22) events and activities.

- The objective is to begin the formulation of a draft action plan for the current year, which will be used in drafting an action plan for FY23.

Draft Term Limits Implementation Plan
- (July) With the establishment of term limits within the RGs, each committee will need to create an orderly implementation plan, which will not start until FY23. Establishing the allocation of term limits amongst current committee members will also help with volunteer recruitment efforts.

August – October Activities

Finalize Term Limits Implementation Plan
- (August) With the establishment of term limits within the RGs, each committee will need to create an orderly implementation plan, which will not start until FY23. Establishing the allocation of term limits amongst current committee members will also help with volunteer recruitment efforts.

Draft FY23 Action Plan
- (August-September) Once the current year (FY22) activities and events, as well as term limit implementation plans, are confirmed, the committee will begin to draft a FY23 action plan, which is required under the new RG operating procedures. The action plan will be used for any budgetary requests, as well as to monitor the efficacy of the RG in achieving its strategic goals.

- An objective of this activity is to review and modify the mission statement of the RG to set the overall focus for the RG for FY23.

Identify RG Leadership for Following Year
- (August-September) In concert with the creation of the FY23 action plan and budget, each committee should identify key leadership roles of the RG to include Chair and Vice-Chair. The Operating Procedures manual identifies the protocol for assignment of these positions.

RG/NG Chair Feedback Session
- (September) Chairs of the pilot groups will have periodic meetings with the Committee Restructure Task Force implementation groups to obtain their feedback on their experience as chair and the experience of their volunteers. Additionally, the implementation groups will help provide assistance as needed.

Leadership Summit Series (Event #2)
- (September) As a part of the Leadership Summit Series, NCACPA's 2nd program will provide an update on the transition process, as well as discuss current benchmarks for committees to achieve in the transition process:
    1) Draft of FY23 Action Plan
    2) Implementation plan for establishing term limits

- The objective is to focus a committee's efforts in the most important areas to facilitate an efficient transition.

Recruitment of Volunteers
- (September-October) A key part of the RG volunteers is the ongoing recruitment of future classes of the RG. Once an implementation plan has been stablished for term limits, the committee should begin its intentional recruitment of additional volunteers.

- The Operating Procedures manual provides clarification on the three parts of the process:
    1) volunteer qualifications
    2) solicitation of volunteers
    3) assignment/appointment of volunteers

November – January Activities

Confirm RG Leadership for Following Year
- (November-December) – RG leadership needs to be confirmed and finalized by the time the action plan is complete and submitted to the Executive Committee for approval.

Confirm/Submit FY23 Action Plan
- (December-January) As outlined in the Operating Procedures Manual, each RG will submit an action plan, which will be reviewed and monitored. The action plan will contain, amongst other things, the RG's mission statement for their overall focus for the year.

- If there are any changes to the mission statement, the revisions must be submitted to the Executive Committee for approval.

FY23 Budget Request
- (December-January) As part of NCACPA's budget process, each RG will be asked to submit a budget request by January 31st for the subsequent fiscal year. Any changes or revisions to the budget request will be discussed between the Lead Staff Liaison and the RG Leader.

RG/NG Chair Feedback Session
- (January) Chairs of the pilot groups will have periodic meetings with the Committee Restructure Task Force implementation groups to obtain their feedback on their experience as chair and the experience of their volunteers. Additionally, the implementation groups will help provide assistance as needed.

Leadership Summit Series (Event #3)
- (January) As a part of the Leadership Summit Series, NCACPA's 3rd program will provide an update on the transition process, as well as discuss current benchmarks for committees to achieve in the transition process:
    1) Identification of RG leadership
    2) Recruitment of volunteers
    3) FY23 budget request

- The objective is to focus a committee's efforts in the most important areas to facilitate an efficient transition.

Recruitment of Volunteers
- (November – January) Continued identification, solicitation, and recruitment of volunteers during this period.

February – April Activities

RG/NG Chair Feedback Session
- (April) Chairs of the pilot groups will have periodic meetings with the Committee Restructure Task Force implementation groups to obtain their feedback on their experience as chair and the experience of their volunteers. Additionally, the implementation groups will help provide assistance as needed.

FY23 Leadership Summit
- (April/May) Planning has not begun for the FY23 Leadership Summit, but the committee to RG transition will continue to be a significant strategic focus for NCACPA.