

WORKSHEET PACKET

SLOW DOWN TO SPEED UP

How smart associations build capacity
before they burn out

Name _____

Organization _____

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ASSOCIATION WEST
Next Wave

FOUR LEVERS, ONE LOOP

Most associations don't have a capacity problem. They have a systems problem. These four levers are where the system lives.

01

Workflows
Repeatable work, mapped and templated so anyone can pick it up.

02

Decision rights
Who decides, who's consulted, and who's informed, named before the work stalls.

03

Communication norms
Agreed channels and response times, so requests get assigned, not forwarded.

04

Tech stack
A few tools, each with one clear job, on top of a system that already works.

THE LOOP: PICK ONE → MAP IT → TEMPLATE IT → REPEAT

YOUR AFTERNOON

Page 1	Friction check and score	All four levers
Page 2	Map one workflow	Lever 1
Page 3	Decision rights grid	Lever 2
Page 4	Channel guide and stack audit	Levers 3 and 4
Page 5	30-day commitment	Making it stick

FRICTION CHECK

Rate each statement in its box: 1 = not at all true, 5 = completely true. Go with your gut. Then total each lever and circle your highest.

01 WORKFLOWS

Score ____ / 20

- | | | |
|---|--|----------------------|
| 1 | Our recurring work (webinars, onboarding, renewals) gets rebuilt from scratch each time. | <input type="text"/> |
| 2 | If a key staffer left tomorrow, critical knowledge would leave with them. | <input type="text"/> |
| 3 | Our busy seasons bring other projects to a halt. | <input type="text"/> |
| 4 | We find out about a missed step only after something goes wrong. | <input type="text"/> |

02 DECISION RIGHTS

Score ____ / 20

- | | | |
|---|---|----------------------|
| 5 | Work regularly waits on approval from one or two people. | <input type="text"/> |
| 6 | Staff aren't sure which decisions they can make on their own. | <input type="text"/> |
| 7 | Decisions get revisited or reversed after work has started. | <input type="text"/> |
| 8 | Volunteers and staff sometimes both think they own the same decision. | <input type="text"/> |

03 COMMUNICATION NORMS

Score ____ / 20

- | | | |
|----|---|----------------------|
| 9 | Staff spend a large share of their day in internal email. | <input type="text"/> |
| 10 | Requests get forwarded around with no clear owner. | <input type="text"/> |
| 11 | We have no shared agreement on which channel to use for what. | <input type="text"/> |
| 12 | Staff meetings are mostly status updates. | <input type="text"/> |

04 TECH STACK

Score ____ / 20

- | | | |
|----|--|----------------------|
| 13 | We pay for tools that do overlapping jobs. | <input type="text"/> |
| 14 | We use only a fraction of the features we pay for. | <input type="text"/> |
| 15 | Staff re-enter the same data in more than one system. | <input type="text"/> |
| 16 | We've added a tool to solve a problem that was really a process problem. | <input type="text"/> |

4-8

LOW

9-14

MODERATE

15-20

HOT SPOT

MAP ONE WORKFLOW

My workflow _____

A. List every step

Start to finish, 8 to 15 steps. Include outsourced steps, and circle them.

#	STEP	#	STEP
1		9	
2		10	
3		11	
4		12	
5		13	
6		14	
7		15	
8			

B. Group and assign

Group steps into phases. Add an owner, an asset or template, and a relative due date.

PHASE	OWNER	ASSET	DUE (RELATIVE)
			e.g. day 3

Find the gaps: where would this break if the owner were out for two weeks?

DECISION RIGHTS GRID

List three decisions that regularly stall. Fill in who decides, who is consulted, and who is informed. Circle one you could delegate.

Decides

One name

Consulted

Before

Informed

After

Delegated

With guardrails

DECISION**DECIDES****CONSULTED****INFORMED****1****2****3**

The one I could delegate

Delegate to

Guardrails

12 min

TYPE	WHERE IT GOES	RESPONSE TIME
Task		
FYI		
Quick question		
Urgent issue		
Decision record		

10 min

[illegible]

30-DAY COMMITMENT

Fill in all four. Then tell a neighbor your first step.

My hot spot

Your highest lever from page 1

My one change

Specific enough to start Monday

My early adopter

Who will try it with you first

How I'll know it's working

What you'll see in 30 days

My first step

Check-in date

NOTES