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Rely on Chamber Checklists
Bob Harris, CAE

I attended a seminar where the staff seemed in chaos. Asking, "What's wrong," they explained they had forgotten the name badges and the room signage.

As soon as the chamber president returned to the office he started making a checklist. He was determined not to let mistakes ruin the next event.

The Power of Checklists

Checklists detail the best ways to accomplish projects. Airline pilots rely on them from pre-flight to landing the plane. Health care professionals use them to make certain they consider every option, especially in life saving situations. When an omission can cause disaster, a listing of tasks, steps, best practices and protocols is essential.

Checklists promote excellence. Skipping a step might lead to another occurrence where the name badges or signs are forgotten. With a list, when steps are completed there is a feeling of accomplishment and readiness.

RaDonna Hessel, CEO, at the Grapevine Chamber in Texas said, "the checklists that Bob Harris has created affirms that I am doing things right and reminds me and my staff if I have missed a step. As the CEO, it is also a way to make sure if a staff person is out, or leaves the Chamber, that the event maintains and can improve its quality year after year."

Benefit for Staff

For staff, some projects may seem overwhelming. To achieve the results, the adage, "when eating an elephant --- take one bite at a time," promotes breaking big jobs into small tasks.

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A checklist facilitates a team approach to working toward desired outcomes. Any level of staff can help advance items on the lists.
The list itself increases understanding, for instance showing employees why steps must be completed in sequential order.

Other benefits of a checklist:

□ Nothing is overlooked or forgotten.
□ Steps are completed in the proper order.
□ Any member of the staff can help.
□ Complex processes are transformed to smaller tasks.
□ Continuous improvements occur as the better practices are implemented.
□ The speed for completion is enhanced.
□ Protects the staff by leaving a path for future employees to follow.

Create a Checklist

Start by identifying the desired project or outcome. In a chamber it could be a festival, newsletter, board meeting or nominations process.

To create a checklist, consider "reverse engineering."   Knowing the desired outcome, think backwards – from the start – to create the tasks and timeline.   Reverse engineering is the process of taking apart a project to see how it works or was created, in order to duplicate it.

1. Identify the processes that are components of the desired result.
2. Don't micromanage the list; detailing every task will turn off creative processes of staff.
3. Develop the lists as a team, seeking input departments and individuals to have a comprehensive approach.
4. Enumerate tasks or use boxes that can be checked off upon completion.
5. Leave space to make notes about ways to improve --- or problems areas.
6. Include names, titles, phone and email of vendors, speakers or facilities that are repeated to avoid wasting time in the future.

Make lists for the most important processes.   Make them accessible by adding them to a procedures manual or on a shared computer drive.

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Note: Bob Harris, CAE, provides tips and templates for nonprofit governance and management at www.nonprofitcenter.com.   New checklists include: "Cleared for Takeoff – Implementing the Strategic Plan," "Inventory, Assess and Improve" (120 questions to promote efficiency and reduce risks); "Improve the Board's Annual Retreat," and "Equip the Incoming President with Resources."