



The Washington Society of Certified Public Accountants
Bellevue, Washington



WASHINGTON SOCIETY OF
CERTIFIED PUBLIC ACCOUNTANTS

THE ORGANIZATION

Founded in 1904, the Washington Society of Certified Public Accountants is one of Washington's oldest and most respected professional associations. The Society's 16-member board and 23-member staff advocate for the profession with policymakers, serve the education and professional development needs of more than 9,000 WSCPA members across the state, help promote the accounting profession to the next generation of accountants and ensure the highest standards to earn and maintain public trust.

THE CHALLENGE

The WSCPA is an active, dynamic organization that relies on its leadership team, staff and volunteers to drive the organization forward. While the organization had successfully developed its vision, defined its mission and established its core values, the next steps were crucial. Says Executive Director Marcia Holland: "We needed a tool to capture the key initiatives, strategies and tactics, to drive implementation and ensure accountability among our staff, leadership and volunteers."

THE SOLUTION

Blueprint for Excellence and the Blueprint Tool can help most organizations, but they're at their best when matched up with organizations like WSCPA – driven, successful organizations that know where they want to go and need targeted help to arrive there. For WSCPA, the Tool empowered staff not only to improve their own departmental planning and implementation, but also to help board members and volunteers assign tasks and ensure follow-through. "We have volunteers and leaders with great ideas, but they need help to make sure those ideas become real," Marcia Holland says. "With Blueprint, our staff can help them capture their ideas, assign tasks, set deadlines and make sure they're met. It improves the morale of staff and board members alike, and the work gets done."

With the help of the Blueprint Tool, the principles of Blueprint for Excellence and the guidance from Upstream Northwest's trained Upstream Academy Guides, WSCPA focused on achieving specific, targeted goals, including:

- Engaging Blueprint's prioritization tool to consolidate disparate ideas and establish 8 achievable goals during the WSCPA's recent strategic planning process. The ideas are now being implemented using the Tool's task assignment/accountability software.
- Using the Tool to redesign the WSCPA Awards program, a crucial annual event that had the potential to motivate staff and members alike, but needed retooling to avoid past mistakes and attract new participants and new ideas.
- Using Blueprint's Discovery Process to capture ideas from staff just returning from a national training seminar, advancing ideas that might have otherwise been lost or neglected.
- Empowering staff in the Discovery Process to identify and prioritize projects they wanted the organization to undertake during inevitable "slow times." This process gave ownership of the ideas to team members and improved staff morale.

THE RESULTS

Marcia Holland says Blueprint for Excellence has helped focus the energies of busy staff people, board members and volunteers alike to achieve identified, agreed-upon goals and complete assigned tasks on deadline – ensuring the success of the ideas being implemented and encouraging repeated acts of excellence throughout the organization. "You walk through our offices and hear enthusiasm. Teams are brainstorming, knowing their best ideas will be implemented. Good work is getting done, and we're serving our members better."



"Blueprint captures the good work we do so we can own it and celebrate it. Every idea is valuable, everyone's contribution is respected. The Tool reinforces that."

Marcia Holland
WSCPA Executive Director
