

**THE INSTITUTE OF SURVEYORS
OF
TRINIDAD AND TOBAGO**

THE CHARTER PLAN

THE WAY FORWARD

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1. INTRODUCTION/ BACKGROUND

In light of ever changing political and regulatory realities, volatile economic and market forces, and an increasingly severe operating and competitive environment, The Institute of Surveyors of Trinidad and Tobago (ISTT) seeks to revitalize the organization in order to reposition the Institute as a viable and relevant professional organization within the landscape of the country.

The design of the proposed change management intervention will be based on a review of the Institute of Surveyors of Trinidad and Tobago vision statement, operations and position within the architecture of the Joint Consultative Council.

2. THE ORGANIZATION AND ITS STRUCTURE

The Institute Legal structure is that of a company and is registered under The Companies Ordinance Chapter 31:01. The Institute is a company limited by guarantee- not having a share capital. Members guarantee is limited up to \$10.00 per member for the debts and liabilities of the Institute.

The Institute of Surveyors of Trinidad and Tobago was established in 1996 to primarily achieve three (3) broad aims:

- To support the needs and requirements of its members
- To develop and promote the surveying profession
- To foster links/ good relations with other professional organizations

There are three bodies which fall under the umbrella of ISTT. These bodies are:-

- Quantity Surveyors
- Valuations Surveyors
- Land Surveyors

(Land Surveyors is the only body which is governed by an Act of Parliament – Act 33 of 1996)

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The ISTT is a member of the Joint Consultative Council (JCC)

Other members of the JCC are:-

- Trinidad and Tobago Institute of Architects
- Association of Professional Engineers of Trinidad and Tobago
- Trinidad and Tobago Contractors Association

At present, ISTT has approximately 200 members and is managed/run by a 20 member (approximately) management committee.

The President who is elected for one (1) year heads the Management Committee.

3. METHODOLOGY / SCOPE OF EXERCISE

The consultant is cognizant of the fact that given the evolution and dynamics of our country, more particularly the construction industry, there is a dire need for professional interest organizations such as ISTT to be more influential in the infrastructure and developmental aspects of the country. This can be achieved through a greater public profile for the ISTT.

It was agreed that, the presenter will draw from his wide and in-depth knowledge and experience of change management and strategic facilitation in order to assist participants in reigniting a new mindset / vision for the Institute.

A presentation, incorporating lectures, handouts, workshops and group sessions were employed in order to fulfill the objectives and outcomes of the exercise. The consultant collaborated with participants to unearth issues affecting the organization, brainstorm opportunities and developed a roadmap for moving the Institute forward.

The consultant actively engaged participants and challenge their ideas, knowledge and understanding of their profession – in other words, participants took ownership of the Institute's destiny.

The consultant sees this assignment essentially as a strategic planning intervention, aimed at moving the Institute closer to ultimately achieving its definition of relevance. The planning exercise involves a change management exercise followed by a

comprehensive study of the Institute's current position and performance to date, an examination of the operating environment, and formulation of appropriate goals, strategies and future actions to be taken.

4. OUTPUTS

The outputs of the entire process including the document review, consultants and the Retreat is the Charter Plan which will be reviewed by the Management Committee and refined into a finalized two year Charter Plan for the Institute.

More specifically, the exercise addressed the need for a better future of ISTT/inviting change into ISTT, whether ISTT can have a larger influential role in the country, the best use of ISTT's resources and whether there can be improvement in ISTT's profile, membership, and image.

The process involves:

- Pre-planning offsite review and organization study
- Review of institute, objectives, and approaches.
- Identify areas of internal strength and weaknesses, including critical success factors.
- Determine key factors to be more relevant
- Identify key areas of strategic focus for the Institute
- Reposition of the organization - development of long-term goals and strategies
- Crafting a Charter – The Way Forward

5. OBJECTS OF ISTT

The Institute considers its present objects as relevant for the organization over the next five (5) years and will endeavor to establish operational plan, objectives and strategies to treat with the objects as contained in **Appendix 1-Objects**.

The Institute main aims being:

- To support the needs and requirements of its members
- To develop and promote the surveying profession
- To foster links and good relations with other professional organizations.

6. POSSIBLE CHANGES AT ISTT

Participants at the Retreat expressed a burning desire to see the following changes at ISTT:

- Great participation of members in the affairs of ISTT
- Improve image of the Institute
- The need for a workable website
- Efficiency in the operations of ISTT
- Increase profile
- Needs to make ISTT more attractive
- Process- Admission of members
- Professional conduct of meetings
- Rules and Regulations for the conduct of the surveying profession
- Improvement in Secretariat/Office office

In addition, participants think that ISTT can influence societal/national change through:

- Education
- Registration of all members
- Government Lobbying by Surveyors
- Having a say in national issues

7. EXTERNAL DRIVERS OF CHANGE AND INTERNAL DYNAMICS CONFRONTING ISTT

External:

- Government Policy
- New Requirements / Codes
- Stakeholder pressures
- Globalisation
- Changing nature of the workforce
- Technology
- Corruption / Ethics
- Clients Perception-qualification/competences
- Competition
- RICS/IAAO
- Dispute Resolution Centre

Internal

- Teaming / Support
- Expectations
- Efficient use of resources
- Internal Politics
- Image / Openness
- Passion to serve purpose
- Structure
- Use of sophisticated technologies
- Conflict of Interest: RICS vs ISTT

8. CHANGE MANAGEMENT

The Management Committee led by its President is cognizant of the role it has to play in managing change at the Institute.

The Committee will attempt to avoid the pitfalls of change failure by ensuring that:

- There is a Sense of Urgency
- Committees and teams will work together
- A vision will be created

- The vision will be communicated to all stakeholders
- The management committee will empower others to act on the Vision
- Short term wins will be communicated
- New systems will be Institutionalized

9. PRESENT ACTIVITIES OF ISTT

These were identified as:

- Promote CPD Seminars
- Meetings – Management Committee/Sub committee
- Member issues/arbitration
- Nominate member to land survey board
- Discuss website Development
- Liaise with UWI relevant courses
- Give input to Joint Consultative Council
- Increase membership

Attendees were surprised about the limited scope/activities of the Institute and vow to increase activity level in a more strategic manner.

Notwithstanding the above activities, the **management committee would like to** undertake the following:

1. Structural approach in developing members from primary to tertiary
2. Public education
3. Increase number of seminars
4. Professionalism - contribution towards national issues
5. To be the recognized professional body for land and construction.
6. Increase Marketing and promotion

10. WHAT SHOULD ISTT BE DOING?

Given its resources, capability and capacity, an exercise was done to determine what ISTT should be doing, notwithstanding what the Institute is presently doing and would like to do:

The organization should do:

1. Develop a functional/Up to Date Website
2. All the areas of what the organization “would like to do”, as stated in “9” above
3. Sustainable Public awareness campaigns i.e. Surveying week
4. Establish a Compliant/Resolution Disciplinary Dispute System
5. Need to have a national voice on related issues
6. Internal awareness by members / Efficient dissemination of information

11. CRITICAL SUCCESS FACTORS

The Management Committee identified the main ingredients ISTT must “**get right**” in order for the Institute to remain relevant:

- Attract and Retain members
- Committed and supportive management Committee
- Must be able to impartially and professionally comment on national related issues.

The Management Committee vows to ensure that these critical success factors are given high priority by the Institute.

12. AREAS OF WEAKNESSES

These were identified as:

- Communication to general membership
- Inability to attract members
- Not promoting the profession to younger surveyors
- Organizing internal social event

13. VISION STATEMENT

At present, the organization does not have a vision statement. However the following is put forward as a draft Vision Statement to be approved by the general membership of ISTT:

“To be the Hall Mark Professional Surveying body in Trinidad and Tobago”.

14. MISSION STATEMENT

- The Mission Statement, as well as the Vision Statement, is provided in the Appendix to this Charter.

15. VALUES

The core values that will guide the operation of ISTT as it attempts to achieve objectives and eventually the vision and mission are herein identified:

1. Integrity
2. Professionalism
3. Social Responsibilities
4. Commitment
5. Trustworthy
6. Respect

16. READINESS FOR CHANGE

Participants accepted that they have a pivotal role to play in changing ISTT and have agreed that:

- Changes are necessary
- The changes could be implemented
- The changes would be institutionally beneficial
- The Institute leaders will commit to the change

- The changes would be personally beneficial

The Management Committee unanimously agreed that they are “ready for change” and would take the necessary steps to ensure that changes are implemented.

17. APPROACH TO CHANGE

From the areas identified in what the Institute “would like to do” and “should do”, a **structured approach** was introduced for each one of the activities as follows:

1. Detail the activities needed for each change area
2. Determine time line for each activity
3. Determine the scope of change needed- realignment, reconfiguration, reconstruction, transformation, etc.
4. What must be preserved in order for the change to be effective
5. Determine diversity/interest of stakeholder groupings.
6. What skills, capabilities, competencies required? Are they presently available?
7. Determine resources required - when needed and in what quantity
8. Who will be responsible for each activity?
9. Which area to target to influence change: values, behavior, outcome
10. How outcomes will be measured?

18. GROUP EXERCISE

In an attempt to develop strategies to implement the areas the Institute would like to do and should be doing, participants were divided into three (3) groups as follows:

Group 1 Responsibility:

1. **Develop a functional/ up to date website**
 - At present proposals are being solicited and should be completed in two (2) weeks times
 - Presentation and recommendation to be made on 5th July 2011 to the Management Committee

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- Administrator will be responsible for executing this project
- In addition, UWI students or an external can be recruited too input data. A stipend has to be paid.

2. Internal Awareness by Members- Dissemination of Information

- Updating of the Membership Data Base on going
- Committee members: Lennard, Hinkson and Mary will be responsible
- Project to finish by the end of August 2011
- Aims of project: Improve Communication between management committee and members via emai, text messages and snail mail

3. Marketing and Promotion

Publish list of all financial members:

- Inform all members (financial and non financial) of the intent of the Institute
- Publish list of all executive members
- Participation in all/any trade shows
- Resources needed: establish subcommittee
- Review/update current pamphlets

Group 2 Responsibilities:

1. Sustainability of Public Awareness Campaigns - Surveying week

- Surveying week – one or two seminars per year (6 persons needed with secretary assistant)
- Radio shows- Every 3-4 months (1-3 persons with secretary assistant)
- TV shows- Every 3-4 months
- Print Media- 3-4mths (6 persons with secretary assistant)
- Attendance at Career Days- once per year (6 persons with secretary assistant)

- Interact with Financial Institutions/Legal professional (1 persons with secretary assistant)

A subcommittee to be developed to oversee this project.

2. Structural approach in developing members from primary to tertiary

- Acquire database to process new and existing members- 3 months
- Contact persons- 6 months
- Send application forms/reminder letters to all members- 6 months
- Have a special membership drive- 6 months and ongoing

Group 3 Responsibilities:

1. Need to have a national voice on related issues

- Identify 3 persons with responsibility for each branch- land, quantity, valuation
- Internal and external communication and advice to President
- President will issue national response
- Increased contribution to newspaper articles

2. Increase number of seminars/public education

- Publication of articles in text media e.g. Newspapers, journals and website
- Invite media personnel to write article
- Send information to banking representatives

19. STRATEGIC IMPERATIVES

1. Develop a vision and mission statement. Attempt to get buy in from a cross section of members/stakeholders.
2. Revisit workflow and structure of organization. It appears that skills sets are limited in the secretariat. Permanent resources may be needed in order to achieve objectives.

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3. Use the “Charge Methodology” as outlined in 17 above to effect changes throughout the organization. Group responsibilities in 18 above should be revisited to ensure reasonableness and consistency with the application in order to achieve the desired outcome.
4. Review Bye Laws for relevance
5. Invest in an I.T. system to process the work activities of the Institute. This should be inclusive of the website. This activity should be outsourced.
6. Review Management Committees make up. A twenty member committee seems large but this may be required given the different arms of the organization. Create ways to “compensate” committee member. This can be in a form of a stipend or non cash benefits.
7. Ensure that systems are developed to treat with the critical success factors and the weaknesses identified.
8. Establish a committee responsible for fund raising, inclusive of seminars and education programmes.
9. The one-year term of the President should be revisited. This appears to be counterproductive to the overall good of the Institute- Each president may want to achieve short term objectives as opposed to a more focus medium term approach.
10. Critically review this document every six months during the planning period to ensure that progress is being made for the betterment of the Institute.
11. Liaise with Attorneys to determine whether the Institute has applied for company continuance under The Companies Act. In addition, if required, ensure that all Returns were filed.
12. A more decisive attempt must be made to increase membership. Identify membership pool.
13. With respect to lobbying and the need to have a voice on national issues, clarify roles between ISTT and JCC in order to avoid misunderstandings of purpose.

APPENDIX

Vision Statement

1-To be the Hall Mark Professional Surveying body in T&T

Mission Statement

1-To actively promote to the public the skills, knowledge and competencies of ISTT members in matters pertaining to surveying.

2-To put in place a regulatory and oversight system governing the practice and conduct of ISTT members.

3-To pursue the establishment of a legal framework for registration of all surveying practitioners in Trinidad and Tobago for the protection of members of the public.

4-To facilitate training and Continuing Professional Development (CPD) to ISTT members thus promoting excellence and cutting edge service in all economic conditions.

5-To be publicly active in matters that impinge on the surveying profession and to be the premier body that the Govt' and other organizations consult on surveying matters of national importance.