Western Regional Meeting
President’s Remarks

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THE CHALLENGE
Forest Product Industry Challenges

- Bankruptcies
- Mergers
- Consolidation
- Fragmentation
- Shutdowns
- Declining margins
- Global competition
Nonprofit Lifecycle Model

Phase 1: Core Program Development

Phase 2: Infrastructure Development

Phase 3: Impact Expansion

Phase 4: Stagnant

Maintain

Decline

Grow

Begin

Dissolve

Defunct

Start-Up

Adolescent
Challenges for Nonprofit Associations

- Member companies demand demonstrated return on their investment
- Reduced time for Member Representatives to participate
- Competing programs and services
- Diverse and conflicting interests and wide variety of Member needs and expectations
- Technology provides alternatives to traditional products and services
- Result – difficulty in delivering demonstrable value; loss of market share and influence

Source: Race For Relevance
Organizational Announcement

- Relocation of analytical lab from Corvallis to Gainesville (Newberry)
- Downsize Western Regional Center office
- Close Northern Regional Center
- Eliminate Regional Manager Positions
- Reduce the Technical Studies Program by approximately 12% to balance effort with resource availability
THE PATH FORWARD
Non-Profit Lifecycle Model

- **Phase 1**: Core Program Development
  - Begin
  - Start-Up

- **Phase 2**: Infrastructure Development
  - Grow
  - Adolescent

- **Phase 3**: Impact Expansion
  - Maintain
  - Mature

- **Phase 4**: Stagnant
  - Decline
  - Dissolve

- **Turnaround**: Defunct
Build on our Strong Foundation and Tradition of Excellence

• NCASI is unique
• Provides significant return on investment
• Dedicated and extremely knowledgeable staff
• Highly credible – science based
• Global reputation

How do we build on this foundation?
Leverage our tradition of Excellence?
Achieve growth?
Expand our influence?
Extend our “brand”?
Steps To A Turnaround

- Focus on Vision and Mission
- Maximize delivery of value
- Focus on meeting Members’ needs
ncasi Vision and Mission

**Vision**
To be a globally recognized preferred provider of relevant environmental science and data that promotes the sustainable use of earth’s resources, informs regulatory policy, educates, and optimizes operations.

**Mission**
Helping Members cost-effectively meet their environmental and sustainability goals through basic and applied research, technical support and education.
Industry-Specific Science that Positively Affects Policy, Regulations, and Acceptability

Expert Analysis and Communication of Current and Emerging Issues

Exceptional Member Support to Enhance Performance and Minimize Cost

Employee Development and Education

Air Quality
Water Quality
Aquatic Biology
Forest Environment and Sustainability
Sustainable Manufacturing & Climate
Chemical Reporting

Technical Analysis of Proposed/Promulgated Regulations
Engagement with Regulators, Policymakers, and Other Stakeholders
Compilation, Analysis and Reporting of Industry Data
Publications and Technical Reports

Support on Compliance Strategies, In-House Studies/Tests, Permitting, Reporting, and Benchmarking
Answers to Technical, Scientific, and Regulatory Questions
Access to Technical Reports, Databases, and Reporting Tools

Handbooks on Regulations, Environmental Control, and Chemical Reporting
Webcasts on Current and Emerging Environmental and Sustainability Issues
Regional Meetings and Workshops
Company-Specific Staff Training

Publications and Technical Reports

ncasi
...adding value through science, communication, support, education
Organizing to Meet the Challenges
The New NCASI Organization

• Focused on maximizing value delivery to Members
• Matrixed/Team Based
• The Organization Design:
  • Leadership Development
  • Functional Alignment
  • Learning Organization
  • Collaboration
  • Geographically Distributed
  • Adaptable

Provides Outstanding Member Support and Organizational Excellence
NCASI Functional Team Charts

President

Executive Leadership Team

Air and Wood Products
Water and Aquatic Biology
Forest Env. and Sustainability
Sustainable Manufacturing
Canadian Operations

Shared Resources

Member Coordination
Analytical Services
Risk / Exposure Assessment & Management
Business Affairs
Information Technology
Safety & Facilities Management
Member Coordination Team Structure

Member Coordination Team

Jain (US)  Vice (Canada)

- maintain assigned member contacts
- coordinate regional technical support
- develop regional meeting technical programs
- membership development
Member Support Team Leaders

- **Pulp and Paper Mills**
  - Diana Cook
  - Zach Emerson
  - Ilich Lama
  - Barry Malmberg
  - Van Maltby
  - Jim Palumbo
  - Derek Sain
  - Brad Upton

- **Wood Products**
  - Rob Crawford

- **Forestry**
  - Eric Vance
  - Jake Verschuyl
  - Darren Sleep
CLOSING COMMENTS
Reflections on the Journey We Are Undertaking

• Essential to our collective success today and in the future
• All the new processes, all the new ways of working and interacting are in place and being refined
• We need feedback; critical evaluation of what is/what is not working; patience
• We need to work together to transform NCASI to get back on the growth curve; deliver greater value to you our Members; create new successes; identify and execute on new opportunities

Let Me Hear From You

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