

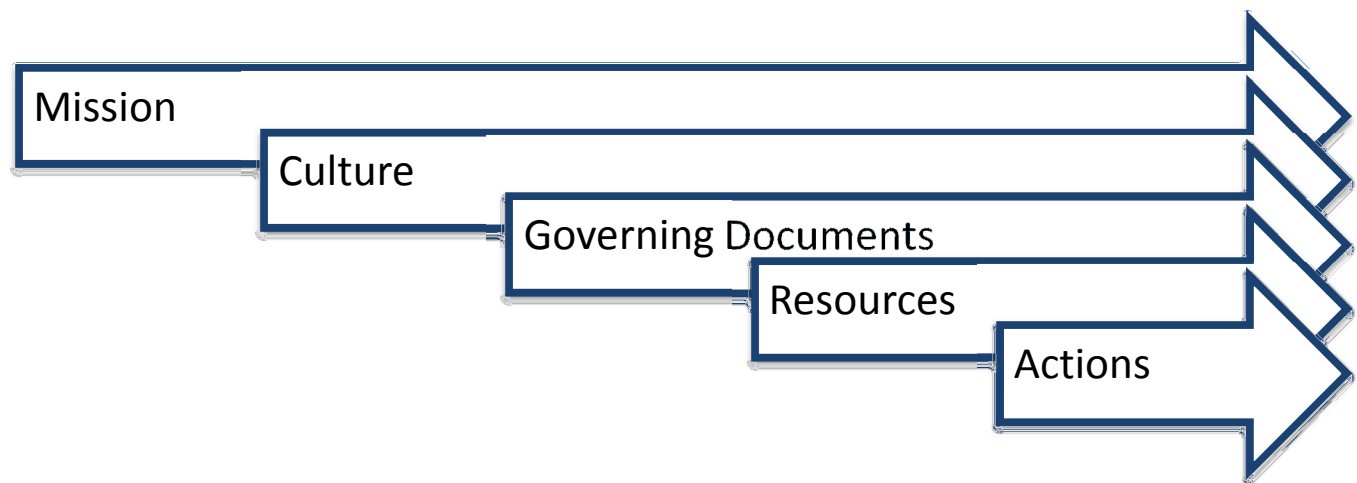
Alignment in the Association

Bob Harris, CAE

Sam joined the association board with enthusiasm. At his first meeting he was quiet the first half and then jumped in, “While I’m on the board I hope we can adopt this new idea that my friends told me about.” A few of the directors agreed but the more seasoned officers reminded Sam, “We work within a framework and our ideas should align with our strategic plan.”

When you think of an association seldom does the word “alignment” come to mind.

Yet, every association has a framework composed of governing documents, cultural values, strategic direction and (limited) resources. The actions - proposals, programs and ideas – must fit within the framework.



Elements of an association's framework.

This describes the typical association framework:

Mission Statement – The purpose for existence, submitted to the IRS and the basis for designation as a federal tax exempt organization. The mission should frame nearly every discussion and project¹.

¹ Consider including the mission statement on the bottom of every board agenda.

Some organizations promote a vision statement to supplement the mission; describing a long term aspiration or desired outcome.

Culture – Experienced boards identify values that serve as a “filter” for decision making. The values are guiding principles for board and staff. Directors should consider the values before accepting a role. Frequent values include transparency, innovation and integrity. The relationship with a parent organization will also influence culture.

“Creating projects and programs without alignment may cause chaos and exhaust resources. Success increases when volunteers understand the framework and align their ideas and actions accordingly.”

Governing Documents – Meetings, deliberation and decisions are guided by the governing documents. Actions of the board must fit within the prescriptions of the documents.

- **Articles of Incorporation** – Approved by state government prescribing expectations of the board and corporation.
- **Bylaws** – Describe expectations of the board set out by the members and stakeholders.
- **Policies** – The wisdom of current and prior boards in identifying and documenting the best course of action (i.e. audits, investments, public records.)
- **Strategic Plan** – The plan is the roadmap. Volunteers should determine if their ideas fit within the plan. The board’s role is *not* to come up with new projects but to advance the existing strategic plan.
- **Budget** – A budget projects the annual income and expenses.

Resources – Members expect the board to safeguard resources and to use them to advance the mission and goals. Nearly every idea has an impact on the limited workforce (committees, volunteers, staff and consultants).

Actions – Meetings of the board and committees usually generate ideas or recommendations. Directors and committees must ensure that proposals align with the structure.

Results - Results are outcomes of the work of the board and committees. Members and stakeholders expect results to fit within the framework and may question why new projects and programs are added.

In closing, the concept of alignment recognizes that the organization has existed for many years and current volunteers are the stewards. Creating projects and programs without alignment may cause chaos and exhaust resources. Success increases when volunteers understand the framework and align their ideas and actions accordingly.

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Note: Bob Harris, CAE, provides governance resources on his website at www.nonprofitcenter.com. He can be contacted at bob@rchcae.com.