

ASSOCIATION

FOCUS



INFORMATION FOR ASSOCIATION PROFESSIONALS

Lessons from the Road

By Bob Harris, CAE

I visit hundreds of associations and chambers each year. Many of them have inspired me with their ideas and best-practices. Here are a few of the lessons learned on the road.

Agenda Mega-Issues – One way to focus the board on achievement is to identify a mega-issue on every agenda. The Dallas County Dental Society chairman has asked that a mega-issue be labeled on each agenda so the board allocates the time and attention to the most significant discussions.

Strategic Signs – A stop at the Independent Insurance Agents of Nebraska revealed a wonderful placard in the boardroom to remind leaders to think strategically. The sign promotes strategic thinking, discourages tactical discussions, references the strategic plan, and advocates the mission statement.

Schedule of Authority – The Worcester Regional Association of REALTORS® introduced me to a tool for summarizing bylaws and articles on a single page spreadsheet. The schedule of authority unravels the mysteries of who has responsibility and authority amongst the board, staff, committees and members.

Strategic Plan Brochure – My first encounter with a strategic plan that was transformed into a slick brochure to inform members and stakeholders of

the mission, goals and strategies was at AGC of Colorado. I carry that brochure everywhere I go as an example of a best practice.

Every Member, Every Day – This sign is in the foyer of the California Dental Association in Sacramento. It is

a constant reminder that CDA exists for its members.

Strategic Plan Business Card

– The California Society of CPAs printed their strategic plan elements on a business card. It includes the mission, vision and core competencies so members, leaders and staff are advancing the plan.

Six Days a Week – At least one association I visited keeps their office open six days a week. The attitude of member services is apparent throughout the organization.

Leadership 101 – Every organization offers fundamentals board orientation. At the Ontario Real Estate Association (Canada), they have developed leadership training in successive tracks. From Leadership 100 to level 500, they have identified necessary skills and strategically delivery the message to future leaders.

Tips & Techniques for 2008

Focus On Boards & Governance

This issue

Get to Know the Members 4

Secret of Ignoring 6

Innovations Ideas Improvements 8

Transform Your Board 10

Upcoming Education & Events 12-13

Councils 14

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Lessons from the Road

Policies and Procedures – A policy manual is distinct from a procedures manual. Policies cover board governance while the procedures detail management duties. I was impressed with the style developed at the REALTORS® Association of NW Chicago. When the board adopts a policy, RANWC creates a list of procedures to support the policy. At the top of the page is the board-adopted policy --- followed by a list of tactics supporting the policy.

Strategic Goals on the Wall – Visit the Texas Medical Association and you'll see the organization's mission, vision and four core competencies on the conference room wall. The goals are in large frames and look like classic artwork.

Sponsor the Bathroom – Not every association can find a sponsor for the office bathroom. But at the Iowa Grocery Industry Association, a major tissue company is the exclusive sponsor of the bathrooms; way to go IGIA.

Counting the Members – The San Diego Association of REALTORS® monitors customer service with a wall mounted "clock" that shows how many calls are received each day and how long members are on hold before reaching a service representative. Member service representatives work at specially designed desks --- similar to bank teller stations --- so everything at hand to assist members efficiently.

Sponsor Opportunity Menu – Sponsorship income increased when the Oklahoma Association of Restaurants planned their year in advance by creating a menu of supplier opportunities. The format of the sponsor opportunity menu is of the highest quality for selling to and involving suppliers.

Create an Action Plan – The Independent Insurance Agents of Kentucky creates a matrix to translate the board's 3-year strategic plan into a one-year action plan. At the Eau Claire Area Chamber of Commerce, the 12-page slick business plan includes the board's goals followed by the committee chairs' commitments. Synchronization of the strategic and action plans is a fundamental of organizational success.

Antitrust Avoidance – The simplicity of several tentcards on the boardroom table at the Indiana Association for Home and Hospice Care makes good sense for reminding directors to avoid certain discussions. My favorite guide to communicate antitrust avoidance is published by the National Association of REALTORS® in their Antitrust Pocket Guide.

Signature Quality Outcomes – Including the names of the drafters of a strategic plan is a way to ensure accountability and understanding. The Carpinteria Valley Chamber of Commerce includes photos of the board members who are responsible for advancing the mission and goals.

In summary, one of the great aspects of working with nonprofit organizations is that few of them compete. Thus, the culture of sharing best-practices is a benefit to every executive.

Bob Harris, CAE, conducts board training and strategic planning. His website catalogs tips and templates at www.nonprofitcenter.com.