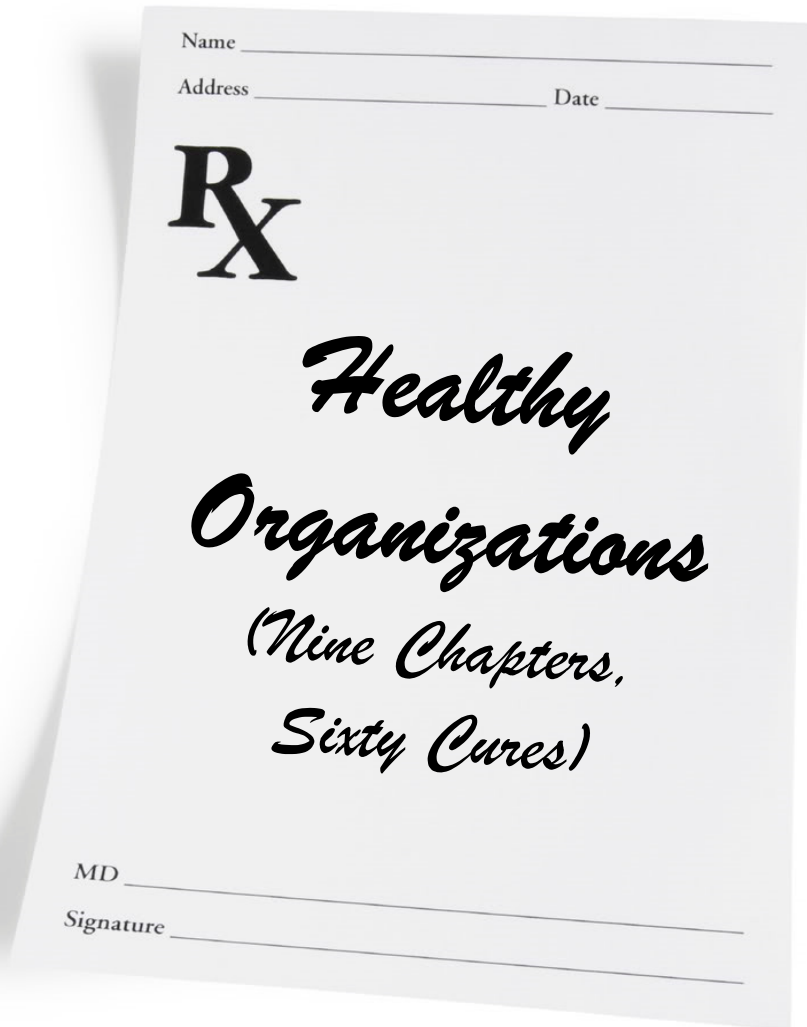




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Foreword

This is a *prescription* for elevating organizational performance.

Most visits to a health care professional result in a prescription. It is the advice offered verbally (“take two aspirin and get some rest”) or written on a pad to be filled at the pharmacy. The intent is to improve one’s health.

A similar approach can be used with an organization --- a prescription to improve health, operations and outcomes. Just as *people* have annual check-ups, it is good for *associations*¹ to have periodic check-ups.

In an organization, an illness or dysfunction might start slow, going unnoticed until it is a real problem. Volunteers may not recognize the symptoms or don’t have the knowledge to cure it. For example membership declines, renewals are down, value deteriorates, governance appears dysfunctional, and results are dismal.

Process

The prescription delves into major areas to assess and improve. It identifies common challenges and concerns; while offering ideas for improvement. The best results come from a staff-volunteer team conducting the analysis.

The process requires an open mind and a desire to make improvements. Sustaining a dynamic organization that delivers member value is the goal.

Consider the eight areas as modules --- interrelated or building upon each other. Address it in any order, best for your organization. Be open to the findings, considering whether or not there is a need to make improvements. As associations reach adulthood or old age in their life cycle, prescriptions for change is inevitable. And like an individual’s health, ignoring the symptoms can result in more serious illnesses.

Name _____
Address _____ Date _____

Rx

- 1) *Membership*
- 2) *Finances*
- 3) *Governance*
- 4) *Strategy*
- 5) *Advocacy*
- 6) *Brand*
- 7) *Technology*
- 8) *Performance*
- 9) *Outcomes*

MD _____
Signature _____

¹ Beneficial to associations, chambers, foundations and other nonprofit organizations.

Member Value Proposition

Does the association deliver genuine benefit and value to investors? Are prospects knocking at the door to join; how many prospects are asking for access to unique services?

What's in the portfolio of benefits? How does it compare to competitive organizations? Are the benefits unique and deliver real value? Is the market share substantive and renewal rate above 90 percent?

When I ask board members to describe the most valued benefits --- the room becomes quiet. Someone might whisper, "Networking, member directory, website."

Benefits used to be the stronghold of associations but they have eroded. Competition for the **"buyer-member relationship"** has increased as evidenced from buying clubs (Sam's Club, Amazon Prime), loyalty programs, APPs sending out info and updates, etc.) The concept of joining for access to special benefits was once exclusive to nonprofit membership organizations.

If communicating benefits is a hodgepodge listing of a dozen or more lackluster items, it's time for a review. Today's members expect a return on their dues investment (ROI.) A long list of activities and services is most likely confusing and potentially exhausting limited resources.

Not all members join for the tangible benefits. Some appreciate the access to leaders, the credibility offered by the association, the recognitions, or simply the sense of belonging.

Associations are abandoning the long list to develop only a few signature programs for which the association will be best known. In the for-profit business model, companies know that a keen focus on only one or two deliverables is a formula for success, i.e. Starbucks, Chick-Fil-A and In-and-Out Burger.

*Bowling Alone*² was the forerunner book to predict declines in membership behavior. It recognized people were not joining civic organizations, organized religion and even bowling leagues as they had been. Factors include busy lifestyles, alternative networking, lack of time and family priorities distract from membership organizations.

² *Bowling Alone*, published in 2000 by Robert Putnam.

In *Race for Relevance: 5 Radical Changes for Associations*³ the authors describe the problem with the value proposition. “The expansion of services and the increase in non-dues offerings had a major negative consequence. It cluttered association communications. The menu of “benefits” became an unmanageable communications mess. Members now have to hunt through long lists to try to find the value. And most don’t even bother to try. Why? Because they’re busy!”

Prescription for Member Value Proposition:

- ❑ **Review the Portfolio** – Appoint a task force to evaluate the *comprehensive package* of benefits and services. Is it a mishmash list of benefits or a strategic description of how the association is unique in what it offers? Does it communicate real value? Do members receive a significant advantage by using association-developed benefits? If the answers are weak or inconsequential review the package with an eye for restructuring. *Race for Relevance* offers a template for the process of “purposeful abandonment.”
- ❑ **Alignment with Mission** – All programs should align with the organization’s mission statement. Analyze every activity as to whether or not it advances the mission --- or drains resources (volunteers, staff, time, funds, etc.) Use the mission and members’ needs as the fulcrum for designing meaningful benefits and services.
- ❑ **Drop** - One or two signature programs are better than a list of mediocre benefits. The association may be struggling to offer a program that could be better administered by *another organization*. Associations have serious competition with other nonprofits, for-profits, publishers and government. An example is a group that was going to spend resources to create a members’ *Guide to the Legislature*. After assigning the task and budgeting, a wise board member said, “I know several organizations that offer this, why can’t we just link up with them?” Drop the weak offerings to redirect resources to developing signature programs.

³ Harrison Coerver and Mary Byers, 2011

- ❑ **Value Calculator** – Make figuring out the ROI compared to dues paid easy to factor. Create a value-statement describing what the association offers. The first step is to identify every benefit and service. The second requires assigning values. Transform the value-statement to be an ROI benefits calculator on the website. Publish a user's-guide to the association similar to the owner's manual for a new vehicle.

Members save with FNGLA!

FNGLA membership has many tangible and intangible benefits from educating resources to valuable opportunities to share ideas and network with your peers. Use this interactive ROI calculator to see how FNGLA membership is a good business investment for your business.

FNGLA's R-O-I Calculator

Benefit	Value
Annual FNGLA Dues	\$100
State's Bulletin Weekly Industry Updates	\$100
Electronic Communications: Newsletters, Legislative Updates, Happenings & Industry News	\$250
Industry Alerts	\$100
Access to FNGLA PRO 8 (Policy, Regulation, Operation Standards)	\$100
Immediate Annual FNGLA Benefits Value	\$600.00

Additional FNGLA Member Discounts	Number	Value/Member	Total Value
The Landscape Show Booth Discount		\$500	\$
Number of 10x10 booths	[5]		
Trade Show Booth Discount		\$500	\$
Number of 10x10 booths	[5]		
15 or 30% Exhibitor Entrance Discount		\$25	\$
Discount Per Number of Entries	[5]		
Show Directory Advertising Discount Per Placement		\$250	\$
Fluoridation Field Days		\$25	\$
Discount Per Person	[5]		
Education on the Go		\$50	\$
Discount Per Person	[5]		
FNGLA Certifications Testing Fees		\$65	\$
Discount From \$65-\$20 Per Student	[5]		
FNGLA Certifications Manuals		\$15	\$
Discount From \$15-\$30 Per Manual	[5]		
Landscape Averse Entry Discount		\$55	\$
Discount Per Entry	[5]		
PlantSMART Listings Discount		\$450	\$
PlantSMART Participation Discount		\$570	\$
Employment Law Hotline		\$180	\$
Savings per Hour	[5]		
Access to Regulatory Compliance Expert		\$135	\$
Savings per Hour	[5]		
Group Life Insurance Savings		\$120	\$
Average \$120 Per Person Annually	[5]		
Household Truck Purchase Discount		\$500	\$
Average over \$500 savings per vehicle	[5]		
Credit Card Processing Average Calculated Savings of \$1,100		\$1,100	\$
Franchise from Florida's FAPC Program		\$1,800	\$
Investment Up to \$1,800	[5]		
Printing, Graphics and Marketing		\$800	\$
From Creative Savings from \$800	[5]		
Payroll Processing Discount		\$880	\$
Savings from \$880	[5]		
Additional Annual FNGLA Member Savings			\$6,000

Total Savings with FNGLA Membership

Your Total Calculated Annual FNGLA Member Savings: \$6,600.00

Join Now!

- ❑ **Community** - Approach membership from a sense of *belonging* rather than coercion and arm-twisting (inevitably these become the *one-year members* and then drop out.). For joiners, membership is NOT always about the tangible benefits but more about a sense of networking with a community of respected peers and/or support for the mission. Promote inclusiveness and access to a respected community.
- ❑ **Market Share Data** – What is the percentage of membership compared to the total population of potential members? Less than 50 percent may spell trouble. Decide on the desired, respected market share. Focus on *quality not quantity* to preserve integrity. Track growth and retention rates.
- ❑ **Dues Model** – Dues models are evolving. Adaptations include “tiered memberships” --- offering introductory rates; distinguishing the basic package from premium benefits. The entry level acts as a “test drive.” A satisfied member may consider an “upgrade” upon renewal. One organization dropped dues entirely, treating *everyone* as “customers.” Persons wanting priority service or a stronger relationship become “investors.”
- ❑ **Survey** – Ask members and prospects what they need. Survey often (but avoid overload) in varied format (i.e. focus groups, post meeting surveys, on-line survey, question of the day, etc.) The best questions are: “What keeps you up at night?” “What is the number one challenge in your career or practice?” Analyze the input to create enhanced benefits.

- ❑ **Customer Service** – I called an association office to hear a recording: “Hours are 9 to 4:30 Monday to Friday with exception of Friday we close at 2. If you are receiving this message it is because the staff takes lunch from 12 to 1 and the office is closed. Please call back.” I felt defeated. Consider the standards set for member responsiveness. Can they text, tweet, call or email the association and leaders? Is there a criteria for how quickly inquirers must receive a response? An association that does not respond is driving members to other sources. During a member’s life time they may seldom call the office – if and when they do they expect a credible response.



Input by Executive Directors about *Rx for Association Health*

“...required reading for every candidate for the Board as well as every current Board member and officer.”

“A great tool for assessing the health, effectiveness and efficiency of associations. Thanks for your work in elevating the performance of associations.”

“Your content and format are extremely valuable tools of the trade. Thank you for making us better association professionals.”

Financial Fitness

Without resources it is nearly impossible to achieve results. The board is responsible for overseeing finances and safeguarding assets.

The authority for financial matters may be delegated to a treasurer, a finance committee or staff. BUT all directors should be knowledgeable about the streams of revenue, annual budget, assets and risks.

Ask any director, “What is the size of our budget” and the responses may vary wildly. Be certain the board has the big picture in terms of finances and resources.

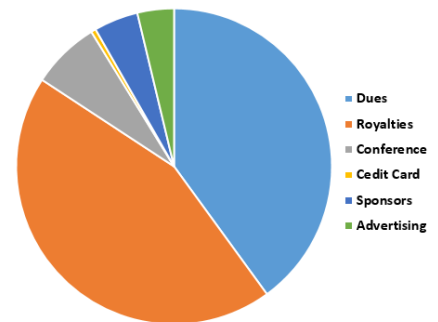
Prescription for Finance and Resource Management:

- ❑ **Understanding** – Increase understanding of resource management by providing access to a CPA. An accountant can orient the board about concepts unique to exempt organizations, generally accepted accounting principles, audit practices, IRS Form 990 and safeguards. Advise directors that Form 990 reveals much about the association and their work on the internet
- ❑ **Myths** – There are many myths in nonprofit organizations. For example, “I heard we cannot have savings or make a profit.” And, “I gave away the budget because we are a nonprofit and have open-records.” Dispel the myths with better knowledge.
- ❑ **Budget** – Set a realistic budget. Review it at every board meeting. Directors should review it for omissions, trends, comparative analysis and be familiar with the major line income and cost line items. Let the minutes reflect that the board did their due diligence and “accepted” the financial report as presented or pending an audit.
- ❑ **Safeguards** – Does the association spend half the annual budget on a weekend conference while neglecting to insure against cancellation? Risks might include storms, strikes, news, illness, fires, fears, etc. Don’t be naïve about spending members’ money. Adopt policies and processes that protect resources, for instance independent audits,

reporting, access to funds, transparency, amount of savings, and risk management.

- ❑ **Perspective of Resources** – The board should grasp the big picture of resource management. Combine the amount of annual income + assets to understand the “whole.” For example a \$480,000 annual budget and \$460,000 in savings should give the board a perspective of a nearly million dollar organization. (Be especially leery of a treasurer who believes it is good practice to protect assets by *not* giving the board a true picture of savings.)

- ❑ **Revenue Diversity** - Transform the budget into a pie chart to enhance understanding. Regarding income, there should be more than just “two slices of the pie.” Revenue diversity protects the organization should there be failure in an area, such as conference cancellation or declining dues. Identify new income streams, considering programming, licensing, royalties, partnerships, sponsorships, advertising, certification, etc. Having only two revenue sources could be a prescription for disaster.



- ❑ **Savings** – How much is enough? Check the ratio of savings to the annual budget. Some associations have too little or too much. Those with ample funds sometimes say, “We can’t spend the money because prior leaders saved the funds, or it ‘belongs to the members’.” Savings have minimal value sitting idle in accounts. A large reserve may be counterproductive to a positive member experience. Remember the assets are public record as reported on IRS Form 990 --- causing members to question price increases. If the board is reluctant to spend from savings, suggest allocating a percentage to R & D (research and development) for projects such as improved communications or investment in technology. Associations with smaller savings might set a policy and goal to improve their reserves. Many organizations rely on an amount of savings equal to at least *fifty percent of the annual budget*.
- ❑ **Restricted Line Items** – Previous donors may have contributed funds with restrictions for a precise purpose. It was important at that time but things may have changed over the decades. If significant funds are *restricted*, consider whether or not state law, and the person or their heirs, would allow removal of the restrictions. Money locked-up in savings for decades does little good to advance the mission.

- ❑ **IP** – Though intellectual property may not be a financial resource, the brands and original works of the association are an asset. Programs, articles, publications, etc. should be protected (copyright, watermarks, footers, etc.) Too many associations don't protect their original works and trademarks. (In a recent consult an established association found a start-up that was using their identical mission statement with the exception of one word.) Be certain to identify and protect your "original works."



Board and Governance

Governance requires the leadership team and staff professionals⁴ to work in partnership. The board is entrusted by members to perform their fiduciary duties.

Meetings of the board should not appear as the "lunch bunch." Nor should there be an image of "good old boys."

Members are entitled to expect results from the governing body (protection, success, advantages, etc.) Check for relevance by reading recent board meeting minutes. Do they reflect decisions about the mission and goals, or are they a series of reports? Are discussions **tactical** or **strategic**? If tactical characterizes meetings, seek new behaviors or craft agendas to support higher-level discussions.

Bad behavior at the board table has a detrimental impact. Symptoms include lack of quorums, ill prepared directors, and the persistent "devil's advocate." The aim is to develop a culture of trust in which the board and staff advance efforts *together*.

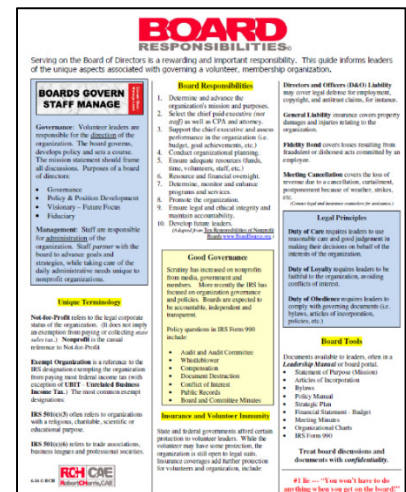
Prescription for Board and Governance:

- ❑ **Board Composition** – Consider the size and make-up of the board. In the *past* there may have been good reasons for adding board seats. Through technology, seldom do members funnel their needs and concerns through a delegate or wait for a special meeting. Members seldom communicate their issues through a representative board member when they have 24/7 access through technology channels. Though there is minimal correlation between board size and good governance, the size should allow for meaningful conversations (the average size is 15 persons.) Conduct a

⁴ I always reference staff as professionals so the board understands the unique body of knowledge and responsibilities of working in an association and non-profits.

governance review and restructure to make it an effective, efficient board.

- ❑ **Nominations** – Good governance starts with a dependable nomination process. Arm the nominating committee with the information needed to inform candidates of expectations. The composition of the board should be based on competency --- not geography. Identify the desired traits and core competencies for the board. Do not tell nominees, “You won’t have to do anything when you get on the board.”
- ❑ **Young Leaders** – Associations are ideal platforms for developing leadership. Create opportunities or committees for young professionals and emerging leaders.
- ❑ **Orientation** – Instill board knowledge through an annual orientation or the opportunity to “refresh and blend” the directors. Be sure directors understand risk avoidance, strategic direction, resources and the board-staff relationship of governance and management. Consider using board-buddies and mentors to connect new directors with the more seasoned.
- ❑ **Access to Information-** A director cannot govern effectively without access to information. Whether it be housed in a board portal, the cloud, or a leadership notebook, be certain they receive access to everything necessary for good governance. Directors should sign for receipt or access to the documents and a commitment to read and follow them. No director wants to feel they are left out of the loop. Keep the documents in good order.
- ❑ **Meeting Agendas** – Review agendas with a critical eye for format and content. Many agendas look the way they do because “we’ve always done it that way.” Craft an agenda that keeps the board focused on substantive discussions. Board meetings are not the place to read and listen to reports. Use a consent agenda to distribute general reports, allowing more time at the meeting for substance. Add the mission statement at top or bottom of the agenda.
- ❑ **Culture of Trust** – Organizations develop guiding principles over time. These values should frame discussions and decision making. Identify the values of the board. Some frequent principles include: transparency, accountability, trust, passion and diversity.



- ❑ **Board Evaluation** – The board is expected to evaluate performance of the budget, the chief staff officer and agreed upon metrics. Why not evaluate the board itself? There are numerous resources to conduct an annual board self-assessment. The intent is continuous improvement in governance.

BOARD EVALUATION

Board evaluation is an approach to improving governance — with the intent to maintain a high performing board. The chief elected officer (not staff) leads the process. Input will be treated with confidence.

Indicate your understanding of and offer recommendations for these governance aspects	Very Satisfactory	Satisfactory	Needs Improvement	Very Dissatisfactory	Not Rated
1. Board's understanding of mission, vision, values and goals.					
2. The strategic plan portrays an image of the organization in 3, 5 or 10 years.					
3. Meetings and agenda are organized to achieve the mission and goals (and avoid operating matters.)					
Comments:					
4. Board orientation and self-assessment					
5. Board documents					
6. Board's understanding and updates of governing documents.					
7. Policies are adopted and followed to guide current and future leaders.					
8. Board election process to transparently ensure leadership succession.					
9. Board orientation and self-assessment is sufficient.					
10. Board's annual budget and financial monitoring					
11. Reserves/savings and investment strategies are appropriate.					
12. Financial reports are clear, accurate and timely.					
13. Annual audit and auditor's recommendations are reviewed.					

- ❑ **Guests and Ex-Officio Directors** – There may be reasons to have ex-officio members of the board (with or without voting rights) based on the nature of something they represent outside the association. They usually attend board meetings. And sometimes guests attend board meetings. While it is good to receive added input, be cautious about guests impacting the board's discussions. ("I didn't want to say anything about the issue because he/she was sitting in the room.")
- ❑ **Governing Documents** – Governing documents include bylaws, articles of incorporation and policies. Documents may become cluttered; difficult to understand. Use a task force or attorney to update the documents for a fresh start. Remember that policies are the wisdom of the board of directors; most organizations manage with 30 to 60 --- many suggested by the IRS for good governance. If policies are ragtag, appoint a task force to update and adopt.
- ❑ **Committees** – Committees are intended to supplement the work of the board and staff. Evaluate the committee structure and outcomes to make decisions about eliminating, merging or transforming. A sure way to disappoint volunteers is to invite them to serve on a committee that wastes their time. Align committees with the strategic plan goals. Every committee should have a statement of purpose.
- ❑ **Stand Up for Staff** – There will be times when the board will have to stand up for the team. Volunteer leaders may be blindsided with the statement, "I don't know what the staff does." It takes a team approach to advance the association.
- ❑ **Blow-it-Up** – "If we started a new association would this be the structure we want?" There are reasons a board may need to start anew. Is the organization structured appropriately for efficient governance and meaningful results? Check all the elements, from committees to bylaws to see how a comprehensive governance review by a task force or consultant might help.

Strategic Direction and Planning

When joining a board, the first question directors should ask is, “Where is the strategic plan – *our job is to advance the plan.*” The strategic plan guides the organization for multiple years. It is a board responsibility to develop and advance it.

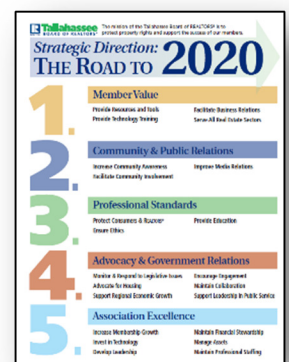
Some directors start their terms thinking, “I’ll fix what’s wrong with the association,” or “I plan to leave a legacy.” That is NOT the purpose of the board of directors. It is charged with advancing the mission and goals, serving members and protecting assets.

Micromanagement, tactical discussions and working in the “weeds” should be banished. To make significant impact in the industry, sector or community, the board should be able to think long term. Successful programs require planning and resources to develop, for instance a certification program, mergers and acquisitions, investment in an office building or a regional conference.

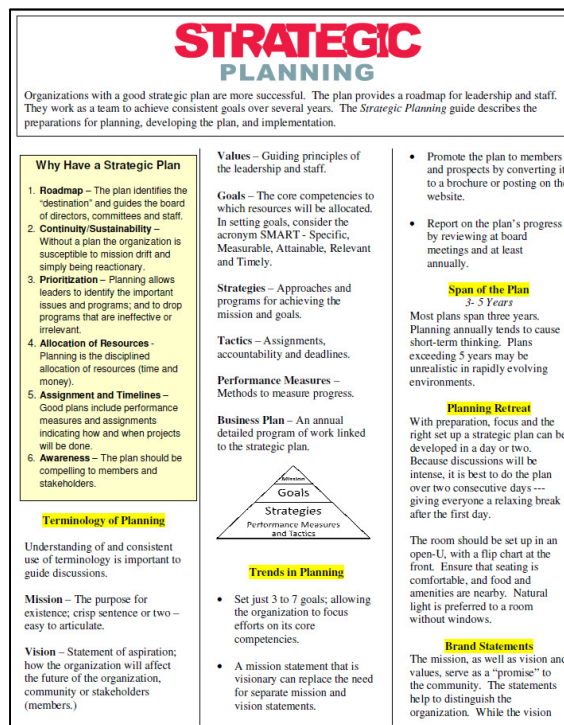
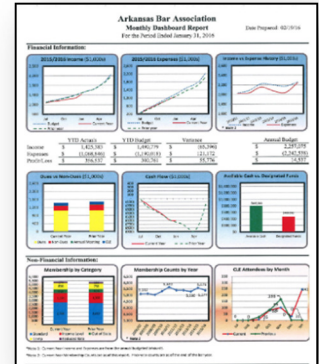
If directors are not familiar with the existing strategic plan, dust it off and make it a focal point of board and committee meetings.

Prescription for Strategic Planning:

- ❑ **Maintain Focus** – The plan should be the focus of every board and committee discussion. Directors should become accustomed to the question, “What part of our strategic plan does discussion advance?” Keep the plan on the board table or conference room wall. Be sure committees have a copy to tie their efforts back to the plan.
- ❑ **Brief is Better** – Twenty page plans are rare. Few volunteers have time to read past page three of any document. The strategic plan should be summarized in a brochure or even a business card.
- ❑ **Promote the Plan** – Informing stakeholders will *commit* the board to working the plan and accountability. Writing the goals and priorities on paper increases the likelihood of achieving results. Promote (highlights) of the plan on the website, as a brochure and share it with allied organizations. Encourage board members to memorize the mission and goals.



- ❑ **Performance Metrics** – Pose the question at the board table, “How will we know if we are successful if we don’t set performance measures?” Nearly every aspect in an association can be measured. Obvious metrics include membership, finances and sales. Even aspects such as diversity, legislative wins, and strategic plan can be measured with some thought given by the board. Report the most important measures as dashboards – visual representations.
- ❑ **Plan of Action** – The strategic plan belongs to the board. It is supported by a program of work or management action plan (MAP) to track board, committees and staff for the year ahead. The MAP identifies accountability and deadlines. Consider color coding: GREEN for progressing, AMBER for caution or needs attention, and RED for halted.
- ❑ **Champions** – Appoint a strategic plan champion from a member of the board to monitor and report on progress. An alternate method for monitoring is appointment of goals’ champions.



Advocacy

Representing the interests of members and communities is a common benefit of associations.

The right to petition government is guaranteed by the First Amendment to the US Constitution. Nearly every organization conducts advocacy and representation on behalf of stakeholders. It is integrated into most mission statements.

It used to be – and can be – the most important benefit. Influence is much stronger as a united voice rather than sole individuals.

Advocacy is described in associations as governmental affairs, representation, voice, lobbying, advancement and more. Members expect their organization to protect their interests.

Yet prospective members are quick to object, “You’ll lobby for me whether or not I join.” An association must bolster its lobbying efforts and find ways to transform the access and outcomes to be a value accessible to members-only. (If government relations is a formidable goal, be sure to budget accordingly.)

Prescription for Advocacy Strength:

- ☐ **Politics** – Some members or their parent companies object to an organization engaging in “politics.” To overcome the objections and misunderstandings, rephrase “political involvement” to be understood as “advancing beneficial public policy.”
- ☐ **Platforms** – Develop a platform or position papers on the pressing issues. Members should be made aware of the organization’s positions.
- ☐ **Grassroots** – Engage members in government relations. It was U.S. House Speaker Tip O’Neill who is credited with the statement, “All politics is local.” Maintain an active Government Affairs Committee. Encourage members to participate and know their local elected officials.
- ☐ **Political Action Committee** – Increase influence by using a political action committee (PAC.) Be sure to set performance measures for its growth and contributions so that it is respected as respected PAC among others. (PAC records are often public, allowing elected officials to gauge issue commitment by reviewing PAC strength.)
- ☐ **Community Relations** – Involve the community and stakeholders in understanding advocacy and its impact. Government relations is stronger

if the community appreciates the issues and lends support.

- ❑ **Celebrate** – Members want to know about progress. Keep them informed of lobbying victories, small and large.
- ❑ **Seat at the Table** – It is said, “if you don’t have a seat at the table you are probably on the menu.” Expand influence by grooming members to participate on appointed and elected boards. Position the association as a leader in coalitions.
- ❑ **Members-Only** – Position lobbying as a benefit of membership. Members should have exclusive access to lobbying reports, opportunities for input and news about new regulations. Publish guide to compliance for new laws. Give members exclusive access to lobbyist updates and conference calls.
- ❑ **Direct Lobby Expenses** – The IRS defines “lobbying” and requires that most tax-exempt organizations inform members that a portion of their dues are non-deductible as a result of such expenditures, or to pay a proxy tax on lobbying. Be sure written annual notice is provided to members to comply with the law.

Brand Strength

Brand is more than letterhead and a logo. Are members raving about the association --- or are their comments lukewarm?

“A brand is a person’s gut feeling about a product, service or organization,” as explained in the book *Behind the Red Door – Unlock your Advocacy, Influence and Success*.⁵

Associations compete with millions of messages for member attention. Is it time for an image update? Is the name, mission and logo communicating strength and purpose?

Many nonprofits have a logo with minimal impact; looking dated. When asked about making a change one might hear, “Well the daughter of a past president designed it so we can’t touch it.”

Approach brand strength and communications in a strategic and comprehensive manner. Engage the expertise of a communications and brand consultant.

⁵ Author Karen Moore, 2016.

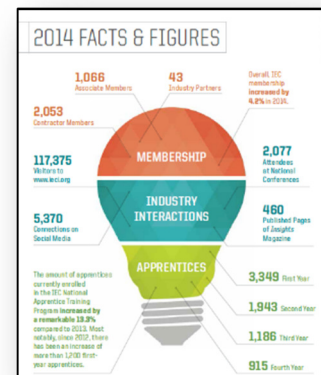
Seldom does a *volunteer committee* have the skills needed for a powerful, sustainable image campaign.

Prescription for Brand Strength:

- ❑ **Mission, Vision and Values** – The mission, vision and values statements communicate the purpose of the association. The mission statement is critical to internal and external audiences, communicating who is served and what is offered. Vision and values supplement the mission. Is the mission easy to communicate and effectively describe the association ---- setting it apart from other organizations? Can leaders and staff state it from memory? Effective statements tend to be only a sentence. A vision communicates what the future looks like with the association's efforts. Values are guiding principles.

- ❑ **Economic Impact** - An association should know its impact. Data might include size of the sector, investments, number of employees, sales and taxes paid. Communicate impact with an info-graphic.

- ❑ **Speaking Authority** – Be clear about who speaks for the association. It is the responsibility of the chief elected officer and is commonly delegated to or shared with chief staff. Remind directors and committees they do not speak for the board. There are lines of authority that must be followed to support consistent messaging and reduce liability.



- ❑ **Banners** – Associations used to invest in bulky trade show booths. Now the pop-up spring banner is effective, easy to ship and low cost. There are many messages and ways to use banners, often drawing sponsors to cover the costs.
- ❑ **Style Guide** – To maintain consistency in the brand and communications, create a style guide. It prescribes the exact use and duplication of the brand, including PMS colors, preferred wording, typeface styles, etc. Share the guide with webmaster, printer, chapters, staff, etc.
- ❑ **Collateral Materials** - Brochures, flyers and applications are the face of the association. It is surprising to see membership applications are faded copies appearing more like a tax return (requiring too much detail.) Check for an effective, consistent look for the association.

- ❑ **Graphics** – People are absorbing information through graphics rather than reading paragraphs and reports. Use info-graphics and dashboards to communicate important information, economic impact, trends and achievements.
 - ❑ **The Name** – Saddled with a name that no longer fits? Some organizations are transitioning from using the word “association;” preferring “alliance,” “institute,” or “council.” I have heard, “We can’t change our name, what would the founders think?” Consider the example of AARP dropping “retired persons” to transform to “AARP - Real Possibilities.” Start REALTOR® associations are dropping the word “association” from their names across the USA. Consider a DBA – doing business as.
- 
- ❑ **Elevator Speech** – The time it takes to communicate a succinct message between the first and third floor of a building – that’s an “elevator speech.” Sometimes the best way to be sure all leaders communicate the same message is to develop a three paragraph statement. It should include founding year, brief history, impact or size, mission, positions and goals.
 - ❑ **Internet Presence** – Evaluate the association’s digital presence, including website, social media and electronic communication strategies. Be strategic to avoid member “email fatigue.” If the association Facebook page is simply a staff assignment to update at least monthly, the site is doomed. Social media pages should host robust discussions amongst members, leaders and stakeholders visiting the page insights and exchange of information.
 - ❑ **Media Relations** – Train leaders and staff how to respond to the press. Consider press releases and press conferences when there is genuine news. Maintain the media as a friend of the organization.
 - ❑ **Press Kit** - Be prepared to respond to media or describe the organization with a well assembled press kit. It may be virtual – accessible on-line, or hard copy in a clean folder. It is a collection of association data that might include impact, history, strategic future, contacts, etc.
 - ❑ **Hire Expertise** – Don’t rely on a volunteer committee to do a makeover of the brand. Use consultants to assess, recommend and implement if marketing talents are not part of staff skillsets.

Technology Platforms

An association website crashed for three weeks. Nobody noticed --- no calls from members, no concerns by staff. It was a harsh realization that the website had no visitors or value.

Technology is integral for efficiency and supporting association functions in every department. Members expect diverse communication options to meet their preferences.

Be leery of the director who sets the standard for tech use when they don't know how to open email attachments. I've heard a director say, "I don't have a computer so please use my son's email address to reach me."

There are boards that still question whether or not a website or social media is necessary. "If we use social media, we don't have anything to make it interesting."

Prescription for Technology Platforms:

- ❑ **Tech Investment** – Don't skimp on the budget; hardware, software, consultants, training, etc. Experts suggest allocating nearly ten percent of the annual budget to support technology use.
- ❑ **Social Media** – Find the right people in the association who use social media for their own success. Appoint a task force to recommend or administer a vibrant social media program. Often the best input comes from the organization's young professionals.
- ❑ **Integrate** – Avoid creating tech-silos. Build platforms that integrate technology throughout the association. Automate the dues process, passwords, accounting, mailings and membership processes. Support staff with software that serves the functions and allows for remote access and travel.
- ❑ **Expertise** – Hire the expertise needed to develop and support a high-tech organization. Do not let the lowest common denominator on the board (directors who don't use technology) dictate how to transform to digital. Today's members expect 24/7 access with the tap of a button (APPs).

Performance Excellence

A board should ask, “How do we compare against other organizations? Are we the best we can be?”

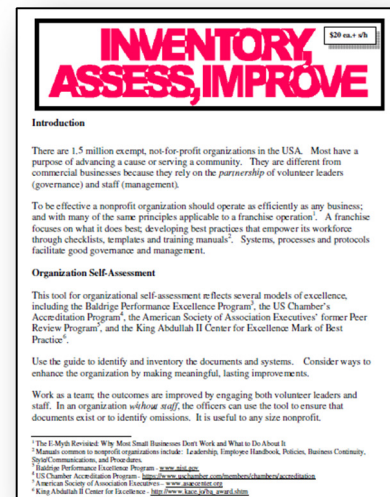
Associations can analyze performance by applying for awards, comparing against standards of excellence and relying on external benchmarks.

“Improving an organization is not a singular proposition. It is a continuous cycle of reviewing and resetting key performance indicators. Performance excellence is achieved when it is done and applied consistently,” said Bill Pawlucy, CAE of www.AssociationOptions.com.

It begins with a commitment by the board and staff to be the best.

Prescription for Performance Excellence:

- ☐ **Benchmarks** - External criteria serves as benchmarks, i.e. operating ratios, or compensation studies. Find benchmarks applicable to the association and regularly measure against the data.
- ☐ **Inventory and Assess** – Associations have many elements, including systems, documents, procedures, risks, deliverables, brand and culture. Periodically step back to inventory and assess all the parts. The goal is to identify opportunities for improvement. A free document is available titled “Inventory, Assess and Improve” at www.nonprofitcenter.com. Conduct the evaluation as a staff team or board task force.
- ☐ **Awards and Recognitions** – Find organizations that recognize excellence through awards. Make application and celebrate the awards; or analyze why the award was *not* received. Most states have an organization administering quality criteria based on the national Baldrige Award.
- ☐ **Risk Awareness** – Nothing detracts from achievements more than reports of risk or loss. Periodically, with help of legal, insurance, and accounting professionals, conduct a review of areas of risk. These might include coverages, activities, financial processes, charitable activities, government



filings, copyright usage, meetings, etc.

- ❑ **Continuous Improvement** – Make continuous improvement a part of the association’s culture. Include it in the strategic plan. Conclude meetings with surveys and discussions, “What can be improved?” Let stakeholders know of the association’s aim for quality processes.

Outcomes

Traveling the globe I am often asked, “With so many nonprofit organizations in the USA, do they produce meaningful results?” I believe the answer is a resounding, “YES.”

Every organization intends to successfully drive their mission and to add benefit for society and the communities they serve. Discuss and identify the societal benefit from the association’s work. Introspectively ask, “If our association did not exist would it be missed?”

When some volunteer leaders are asked about association programs they often speak only of the annual meeting, newsletter or membership directory but *they seldom refer to the societal benefits.*

Associations should think at a higher level, realizing their organizations effect economic wellbeing, employment, safety and access to care, for instance. Nonprofits are an important part of the culture and well-being of the USA.

Prescription for Significant Results:

- ❑ **Social Responsibility** – Associations are a platform for CSR - corporate social responsibility. They lead by example and encourage members to take on their own charitable projects. An association might adopt a philanthropic initiative such as helping veterans. The association is in a position to recognize the pro-bono efforts of members.
- ❑ **Public Benefit** – There is an expectation that associations provide public benefit, although they *primarily* serve their membership. Be clear about the public benefit – most often communicated in the vision statement. For example, an association representing dentistry also works to improve public access to oral healthcare. An association representing real estate works to protect property rights and affordable housing.
- ❑ **Member Success** – Is there a nexus between the association and the success of the members, community or industry? Are the benefits so

strong that members have a significant advantage and tend to prosper (compared to non-members?) Most members want their association to drive business to them or offer support through meaningful programs and services. Identify how a member has economic advantages over a non-member.

- ❑ **Foundation** – Many associations create an exempt subsidiary designated by the IRS as a 501c3 foundation. Much of the scholarship, research and philanthropic efforts are managed by the affiliated foundation.

Close

The prescription for a healthy organization is a platform for improving or affirming performance. It is not all inclusive---it is a starting point.

There are many resources to support a healthy association. Also visit www.nonprofitcenter.com for free association tips and templates.

Name _____
Address _____ Date _____

Rx

- 1) *Membership*
- 2) *Finances*
- 3) *Technology*
- 4) *Governance*
- 5) *Strategy*
- 6) *Advocacy*
- 7) *Brand*
- 8) *Performance*
- 9) *Outcomes*

MD _____
Signature _____

About the Author

Bob Harris, CAE, has been assisting and teaching associations and chambers of commerce with governance, management and strategy endeavors for 25 years.



Insert Mission Statement:				
Identify top 3 influences and perspectives in each box. Staff will tabulate the results for further discussion. Indicate <i>Internal</i> (S) Strength, (W) Weakness or <i>External</i> (O) Opportunity, (T) Threat				
Membership and Value [example: retention rate below 80% - (W)]	Finances, Resources	Board and Governance	Strategic Plan, Execution	
Brand and Technology	Advocacy	Performance	Outcomes – Results	

Repurposed SWOT to identify strengths and weaknesses, opportunities and threats.