Associations Evolve
2023 & BEYOND

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Contents

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From the
Editor

Dear Reader,

"I'm on record saying the first person to live to 150 years has already been born. I said that about 5 years ago. And in the last five years something extraordinary has happened that makes me think it's not just 150 years. All bets are off." - David Sinclair AO (born June 26, 1969) co-director of the Paul F. Glenn Center for Biology of Ageing Research at Harvard Medical School and professor of genetics speaking in his TedX talk on 22 March 2022.

Imagine the impact on associations if people were routinely living beyond 150 years of age. Can't imagine it? Best start trying as it's something we'll be grappling with before we know it.

Whether we like it or not, change is constant.

It's getting faster.

And there is a whole lot more coming.

And it's not just one change. There is a cacophony of scientific, technological, economic, political, cultural, and social changes converging to transform the world we live in.

There is no way for associations to plan for every possible contingency. Instead, we must ensure our organisations have the foundations in place to successfully navigate an uncertain and ever-changing world.

This isn't news to association professionals. Association professionals around the world are already rolling up their sleeves to ensure their associations are doing what it takes to thrive moving forward.

What makes it challenging is that change isn't one big job that can be ticked off a list.

It isn't a single transformation.

Instead, it is a process of continual evolution and refinement. One that builds on the strengths of the association and better positions itself to meet the future - whatever that may be.

There are no "one-size-fits-all" answers. Each association must individually make the choices that cumulatively dictate its future path.

This process is easier when you have a reliable constant to guide your process. Purpose is a useful lens when making decisions. Allowing decisions to be driven by the "why" gives them meaning and context.

One of the brilliant things about associations is they bring people together to advance a cause of mutual interest. To maintain that sense of collective purpose we must bring all those people on the change journey with us.

This requires many productive conversations with lots of people.

These are not general chit chat. They are focussed discussions geared to generate a productive outcome.

This year's Associations Evolve is packed with insights, inspiration, and motivation to help you drive the conversations that will spark the change you want in your association.

A huge thanks to the more than 50 experts from around the world who have taken the time to share their thoughts. It was an absolute pleasure to compile, and their efforts are greatly appreciated. Thanks also to Tanya Busoli for her awesome assistance in the editing process - it was a big job.

Thanks also to Northern Territory Business Events for their valuable support of this project. I've run many events in Australia's Northern Territory and it's wonderful to be able to partner with such a unique and incredible place. I thoroughly recommend them if you are looking for a destination for your in-person events.

So grab a cuppa (Aussie for 'tea or coffee'), put your feet up, and enjoy a deep dive into this year's Associations Evolve.

And who knows, perhaps next year we'll be talking about updating our membership programs to better meet the needs of Baby Boomers re-entering the workforce for another 50 years?

All the best for an amazing 2023.

Warm regards,
Belinda

Belinda Moore

Editor
Associations Evolve, 2023 & Beyond

From our
Partner

Northern Territory Business Events is delighted to once again partner with Answers for Associations for Associations Evolve: 2023 & Beyond.

We know collaborative approaches through strategic partnerships can achieve so much more and engaging with an admired and respected national partner, such as Answers for Associations, affords us an opportunity to build awareness of the Northern Territory whilst nurturing a mutually beneficial relationship.

Whilst the past few years presented us all with an opportunity to do things differently, we always knew the desire for in-person engagement would return as soon as it was safe to do so. The Northern Territory has welcomed renewed interest from associations as a result of a global shift in organisational culture that now focuses more on people and wellbeing. With key themes of reconnection and wellness emerging, our wide-open spaces, iconic landscapes, nature-based experiences and 65,000-year-old culture have the potential to move, inspire and connect delegates to people and place, supporting this refreshing approach.

We also hold a strong belief that a business event should deliver enriching outcomes on both a professional and personal level. More than ever before, people are seeking meaningful engagement and experiences with the destination and host community that go beyond the traditional conference program and which can only be genuinely achieved in-person.

On behalf of Northern Territory Business Events and our industry partners, we wish you a prosperous 2023 and look forward to welcoming you to the Northern Territory.

Warm regards,
Rebecca

Rebecca McCaig

Director
Northern Territory Business Events

The Northern Territory Government continues to provide significant support for organisers of qualified association conferences with priority given to business events which align with the Northern Territory's economic and social strengths. The Northern Territory Business Events Support Fund, which is administered by our convention bureau, offers a minimum of $100 per delegate – you can learn more here.

Keep Calm
– It's Just a Crisis

Crisis management can make the most experienced of communication experts cringe. A crisis can be defined as an outcome of an unpredictable event, or an unforeseeable consequence of an event, which may have been considered as a potential risk. In many instances, crises require that decisions are made quickly to limit damage to the organisation.

Just like strategic communications, stakeholder mapping or even social media strategies, there is a formula to crisis management to ensure that an organisation can make its way through a crisis unscathed every time.

Don't confuse risk management with crisis management

Risk management looks at minimising risks and forms an important part of crisis management. Crisis management involves devising the best way to respond when an incident does occur, whereas risk management usually does not. Crisis management plans will include the establishment of a crisis management team responsible for ensuring a system is in place to effectively address the coordinated response, resources and internal and external requirements during and after the negative situation.

Implement the three stages of crisis management

There are three stages to crisis management, which cover what to do before, during and after a crisis, as outlined below.

· Pre-planning for a crisis – Develop and practice ways to respond to various scenarios –To ensure an organisation is prepared for a crisis, it is important that risks are identified, and plans are in place to minimise those risks. Monitoring systems to detect a crisis early should be implemented, a representative of the organisation should be appointed the crisis manager, and a crisis management plan should be developed.

· During the crisis – Executing the crisis management plan – When it comes to handling a crisis, communication is the key. Even if there is an opinion that there is nothing to communicate, communicate anyway. Often crises are evolving, changing beasts, and regular communication is necessary. During a crisis, the appointed crisis manager should communicate with staff and employees whenever necessary.

· After the crisis – Review, adjust and update crisis management plan – When a crisis has passed, this provides a good opportunity for the crisis manager to meet with the crisis management team to reassess and evaluate to pave the way towards reduced risk. The crisis management plan should be updated with what the organisation has learned after the crisis.

Build strong media relationships when you don't need them, so they are there when you do

When a crisis impacts the public, or if the crisis your organisation is experiencing has an impact on your reputation, having the media on your side is not only important – it's crucial. Whether it's a strategically penned and placed opinion piece, commentary towards articles, or a blog on an influential website, having access to your target audience and connecting with them in a credible way usually requires the media.

If you haven't built strong relationships with key media agencies covering your industry, begin now during happier times, so that when times are tough, the same media agencies are aware of your organisation and its contribution and can grab a shovel to help you.

As you journey through, put out the fire, don't fuel it

For an organisation making their way through a crisis, it is vital they put themselves in the minds of the customer. Some of the worst crisis management case studies highlight a problem being inflamed by a business or organisation through denial, lack of accountability, and a refusal to investigate the problem. The best rule of thumb is to find the source of the problem and put the fire out. Distributing emails denying the issue exists, hosting press conferences that put the blame on others, or worse still, ignoring the crisis, will not help eliminate the situation. It will only further anger customers, and if the organisation is not investigating, the media will undertake this investigation for you, leading to significant negative press and impacts to your reputation.

Journeying through an organisational crisis is no easy feat. Don't hesitate to commission the services of agencies such as Fifty Acres to help you to strategise and ensure your communications are succinct and perfectly timed for maximum impact.

Jo Scard ■

Jo Scard founded Fifty Acres 12 years ago, offering over 20 years experience in communication and a wealth of knowledge in public relations and project management. As a former advisor to Australia's Rudd/Gillard Government, and the British Labor Party, Jo supports her clients with government engagement and strategic communications, including crisis management.

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Embodying
your Values
and Leadership

Good leaders align their actions with their values. Inspiring leaders embody their values, vision, and commitment. Furthermore, they can do so even when under pressure. The key to becoming this type of inspiring leader requires building muscle memory in the body.

What does the body have to do with leadership?

Current neuroscience tells us that while we may believe we are choosing how to behave cognitively, our rational mind plays a limited role in our behaviour, and approximately 95 percent of our behaviour happens from the unconscious. When you couple this with how neuroscience also tells us the fastest way to affect change in yourself and in others is through your body and with your presence, we have powerful information to empower leaders and support our working environment.

Call to mind an inspiring leader you know or see in the world. Are they:

· Inclusive leaders?
· Constantly curious and slow to judge?
· Authentic?
· Known for cultivating good relationships?
· Known for finding solutions or accessing creativity under pressure?
· Demonstrating loyalty to their team?

In their presence do you feel:

· More at ease?
· More capable to be your best self?
· Seen in their presence?

We all have neural pathways that operate below our conscious awareness, often based upon patterns from the course of our lifetime. We can retrain ourselves to become aware of these habitual patterns that derive from our body and our current muscle memory. We can then slow ourselves down enough to disrupt the reactive and unhelpful patterns to become more responsive and aligned in our values and preferred behaviours. Additionally, the impact is authentic and helps to create our preferred presence, embodying our preferred impact, and thereby inspiring others with this energy to do the same.

Think of first responders, or soldiers, or anyone who excels in life-or-death moments. Their heart slows down, they can immediately access flow and creativity, they become keenly aware of everything, their vision expands to include more of their periphery, they can make the most serious decisions immediately and with conviction, pushing back on anything that stands in their way, and their body is fully engaged at all times. It's not just their unique skills, it's the body being aligned to their values, integrity, and commitment. They've learned the physical cues that tell them how to show up in those crucial moments and their muscle memory kicks in immediately. While much more dramatic than many of our everyday leadership scenarios, the biology, physiology, and neuroscience is similar.

When we learn to slow down and focus on our breath, learn how to listen to what our body is telling us through sensations and shaping (ie: sweaty palms and clenched jaw) and know how to check our internal state about what is going on emotionally as a secondary point of data, with the lens of an observer, we can interrupt these unconscious patterns and move from being reactive to being responsive. This result requires building a new muscle memory, which requires daily practice. The benefit of this work can manifest in all areas of your life.
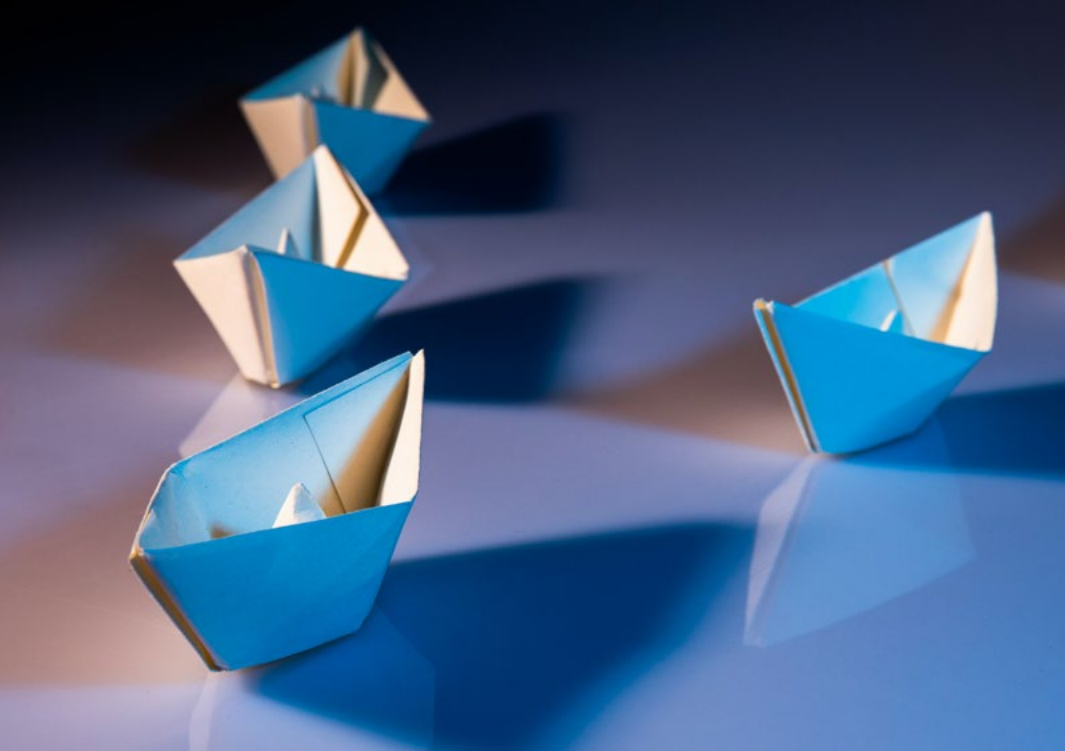
As Jim Loehr, a performance psychologist, and Tony Schwartz, a corporate executive, stated in their article for the Harvard Business Review 2001, Making of a Corporate Athlete, executives need to take care of their physical, emotional, mental, and spiritual capacity in order to be effective. They said, "Of course even corporate athletes who train at all levels will have bad days and run into challenges they can't overcome. Life is tough, and for many time-starved executives, it is only getting tougher. But that is precisely our point. While it isn't always in our power to change our external conditions, we can train to better manage our inner state."

The fastest and most effective way to these solutions is through the body. I encourage you, every day when you take a restroom break, brush your teeth, before a meal, or between Zoom meetings, to take a few deep breaths, slow down, and notice what sensations you can feel and where they are in your body. Start to notice where you might be holding, or where you feel temperature, or openness, or your pulse. Do not judge what you notice, just start to observe yourself each day, see what you might be able to let go because it might not be serving you, or what has room to rise through you. Pay attention to the impact on yourself and others over time. This is a small and powerful start on this complex, lifelong journey to embodying your values, vision, and commitments for your leadership.

Sharon Newport, CAE, is an organisational consultant, facilitator, and executive coach with clients in the nonprofit and for-profit sectors across the globe. Sharon supports her clients' goals of transformational change using expertise in organisational development, diversity, equity, and inclusion, neuroscience, and body intelligence to deliver leading-edge thought leadership for her clients, to meet them where they are and support their goals to evolve. Sharon also serves as adjunct faculty at Georgetown University's Institute of Transformational Leadership.

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Why Association Leaders Need to Prioritise Themselves

The last two years have felt a bit like being stuck on a rollercoaster that you can't get off! The uncertainty of what's next has felt relentless. I can't recall a time where I have heard so many stories about overwhelm, increased anxiety and burnout. It's impacting all industries and all levels of organisations.

A recent report by Deloitte and independent research firm Workplace Intelligence indicates that employees and senior executives are struggling to prioritise their wellbeing. It found that one out of three are constantly struggling with fatigue and poor mental health, and the main reason they aren't prioritising themselves is due to a heavy workload, stressful job and a lack of time due to long work hours.

As leaders, we have a responsibility to care for ourselves first. A lot of livelihoods rely on us. Our staff, our colleagues, our families.

However, with so many of us feeling like we are stuck in survival mode, it can be hard to know where to turn and what to do first.

It's time to for us to prioritise our ourselves

So often we get caught up in work and life and family and commitments that we forget to look after ourselves. To put ourselves first. To recharge OUR batteries. We recharge our phones every day, we need to do the same with our minds and bodies.

When we connect with ourselves first, we are happier, healthier, and more human. We become better versions of ourselves, so we can be better leaders – at home, at work and within our communities.

With so many competing priorities, it's often easier to put the needs of others first. It can be hard to find time for YOU.

Prioritising yourself is a conscious choice. We make decisions around this every day, about what we think, what we eat and drink, when we go to bed, who we associate with, and how we bring joy to our lives.

Four ways to prioritise yourself

1. **Have clear boundaries and stick to them:**
   Our boundaries can be personal or professional, physical or emotional. Imagine them as a fence around what you want to protect. Sometimes you need to open the gate to slip out, but mostly you want that gate closed to protect what is most important to you. Some examples of healthy boundaries include knowing who you want to spend time with, knowing how and when to say no to things you don't want to do and deciding when you will and won't work outside of your official workday.

2. **Do something that gives you joy EVERY DAY:**
   If you have forgotten what joy looks like, then make a list of what you loved to do as a child. Do one of those things today. If life right now is really hard, then plan your joyful activity before you go to bed, so you have something to look forward to tomorrow.

3. Know what gives you energy and what saps it: Some of the common elements include nutrition, exercise, sleep, doing work you love, being mentally fulfilled, and spending time with people who lift you up.

And now think about how you spend your day.

Are you all-systems-go from the moment you get up? Do you have a jam-packed to-do list? A never-ending collection of emails to answer? A calendar filled with meetings?

If this sounds familiar, it's no wonder you're tired.

4. Prioritise self-care: Self-care looks different for us all. For me, it's a walk on the beach at least five times a week and reading crime fiction while sitting on my daybed with a cup of tea or a gin and tonic. It also looks like regular medical appointments to keep on top of my physical and mental health. If you haven't been to the doctor in a while, make an appointment today to make sure that all your bits are doing what they should be doing.

If you're not sure where to start when it comes to prioritising yourself, pick one thing that resonates with you and do that. And if you're not sure where to start, my top tip would be to make a doctor's appointment for a health check and create a baseline to measure your future health.

Mel Kettle ■

Mel Kettle is an internationally recognised expert at Fully Connected leadership and communication. With more than two decades of experience in strategic communication and leadership, Mel is a valuable asset to leaders and teams that want to achieve real connection and sustained engagement. She is the host of podcast This Connected Life and the bestselling author of Fully Connected.

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The Global Side of Diversity, Equity and Inclusion

The need to enhance Diversity, Equity and Inclusion (DEI) is a global issue. Every country in the world has its history of privilege, bias, and discrimination that impact the degree of power versus marginalisation experienced by different groups of people. Yet, when organisations implement initiatives to enhance diversity, equity, and inclusion, they need to consider that all situations and solutions aren't universal and that there's no "one size fits all" worldwide approach to Diversity, Equity and Inclusion (DEI).

Depending on where we live and work there are differences in laws, terminology, and cultural norms about race, ethnicity, age, gender, sexuality, ability, and other traits that trigger stereotypes and discrimination. Therefore, managing DEI initiatives on a global scale has its share of complexities. To ensure their efforts will have global relevance and acceptability, associations that undertake DEI initiatives should consider what fundamental differences matter around the world, what goes into choosing a suitable approach, and what simple measures can have global impact.

What differences matter around the world?

When undertaking DEI efforts, it's important to consider regional nuances in personal demographics, relevant laws, and cultural values.

Attempting to collect or match demographic data on race, ethnicity, religion, and language may prove to be very complex on an international scale. Firstly because of the multitude of cultures, languages, and religions worldwide, even within a single country. Consider that there are 100 ethnic groups in Chad and 37 tribal groups that speak one of 39 languages in Togo, two of the most diverse nations in the world according to the Cultural Diversity Index. Secondly, tracking certain information isn't allowed in some countries like France where laws prohibit the collection of data on race or ethnic origin.

Any efforts to identify, engage, and promote inclusion of individuals based on their sexual orientation should consider that in more than 70 countries there are laws making homosexuality illegal. If not adjusted accordingly, such initiatives could put individuals in these countries at risk in their workplace and communities particularly if modelled after what's effective in countries where there are strong protections in place for LGBTQ individuals.

Cultural values too have a strong impact on DEI if we consider the vast perception and bias differences around the world about age. Policies to combat ageism need to take into account variations between cultures where youth is revered (as in the US) compared to places where respect for the elderly is paramount (as in most Asian cultures).

Developing a DEI strategy for one culture and exporting it to other places isn't likely to work. At best, imposing cookie-cutter solutions will be inefficient, at worst such an approach runs the risk of perpetuating the exact type of cultural imperialism that DEI seeks to address in the first place.

What goes into choosing a suitable approach?

It's important for organisations to undertake their DEI efforts with a global approach from the start by considering their governance structure and their leadership's commitment and risk appetite.

The adage of "think global and act local" is very appropriate with DEI. For organisations that have a worldwide reach but no local structures, it will be essential to conduct research and seek the support of outside specialists. For those that have a global footprint, the key is to leave the decisions for specific national objectives and tactics to local representatives who can help adapt global strategies to their environments. These voices can even address how to message the rationale for diversity because arguments like "it's good for business" often used in the United States may not work in Europe where the benefits of DEI are typically more about "doing the right thing."

The broader the scope, the more important it is to secure the commitment and engagement of senior leaders for any DEI initiative. Board directors and senior executives must be open to having difficult conversations, becoming champions in their own rights, and, if needed, have the courage to acknowledge wrongdoings as was the case, for example, for the American Psychiatric Association's public apology for its historical support of racism in psychiatry.

As daunting as embarking on a DEI strategy might feel, it's worse to make token efforts for appearances-sake or to do nothing at all.

What simple measures can have a global impact

The good news is that there are simple measures that associations can take to create global impact. These include internal measures that will fuel future DEI efforts, and external ones that will create visible change.

As their voices can't be heard if they don't have a seat at the table, adding international representation among staff and volunteers is an important step to becoming a more globally inclusive organisation. This may require getting rid of the perfect English bias which holds some organisations back from leveraging global talent.

Websites and conferences are associations' most public-facing assets. A review and enhancement of the imagery to favor more diversity, and the accessibility features to assist those impaired will go a long way to promote inclusion. So will embracing culturally sensitive language and encouraging others, such as conference speakers, to do the same by creating inclusive language guidelines to replace problematic and outdated terms with alternative ones that encourage a respectful and welcoming environment.

DEI efforts that consider differences around the world and adopt a suitable approach are more likely to be globally accepted, effective, and impactful. While the global side of DEI is complex, the key is to start!

Sylvia Gonner, CAE ■

Sylvia Gonner, CAE, owner of CultureWiz, is a consultant, trainer, speaker, facilitator, and experienced association executive specialised in international management, cross-cultural communications, and global diversity and inclusion. She speaks six languages, has worked on all continents, and travelled to 70 countries.

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Creating Meaningful Connections
in a Digital World

These days we have an almost infinite number of digital connections. This really became apparent when someone reached out to me recently and asked …"It's not 2020 anymore and 2022 is a new world … should we still be connected?".

Great question!

When the world moved en masse to digital practically overnight in 2020, we all amassed significant digital connections. But was it from fear of missing out or the need to stay connected when face-to-face was not possible?

Online connections can generally be defined as strong or weak ties, and now it's time to choose what you want to do with them.

How many connections are too many?

From socialising, to working, and finding the answers to our many questions, we now have a new appreciation of online community platforms.

Digital communities have globally connected us, regardless of our geographic location, giving us an opportunity to be together even when we can't.

Although it's not 2020 anymore, you should now be looking at the digital platforms you are subscribed to, asking yourself, "Is this community or connection adding value to where you are right now?" If you can't answer this question, then I would suggest, it is okay to take a break and focus on the other communities where you are receiving more value and have stronger connections.

You can always re-join later!

Are you really showing your true self?

Every time someone interacts with your digital profile, they form an opinion. I would suggest the same goes for when you decide to connect with someone new, you review their profile, and you decide whether you see any value in connecting with them.

Here's the thing – every connection is valuable, but are you maximising them or are you simply showing up to sell?

Real connections happen when you're being authentic. Whether it is turning up for a Zoom call, or posting a message, it's okay to show your true self in the digital world, as it's very possible to make genuine connections, the same as if they were in-person.

Next time you are scrolling through your newsfeeds, think about who in your network you can offer to connect them with in your own network that will add real value.

There is a place for connections in both the digital world and the real world. It depends on the relationship you are looking to nurture. It's much like a B2B group where you turn up each week and offer a new lead, but is that really how we are still doing business? Shouldn't we be connecting with people based on their skills and interests in the digital and real world?

And don't be afraid to choose to unfollow or take a break from those connections which once may have been relevant but are now in a different industry to you or aren't being authentic.

You can always re-follow them later!
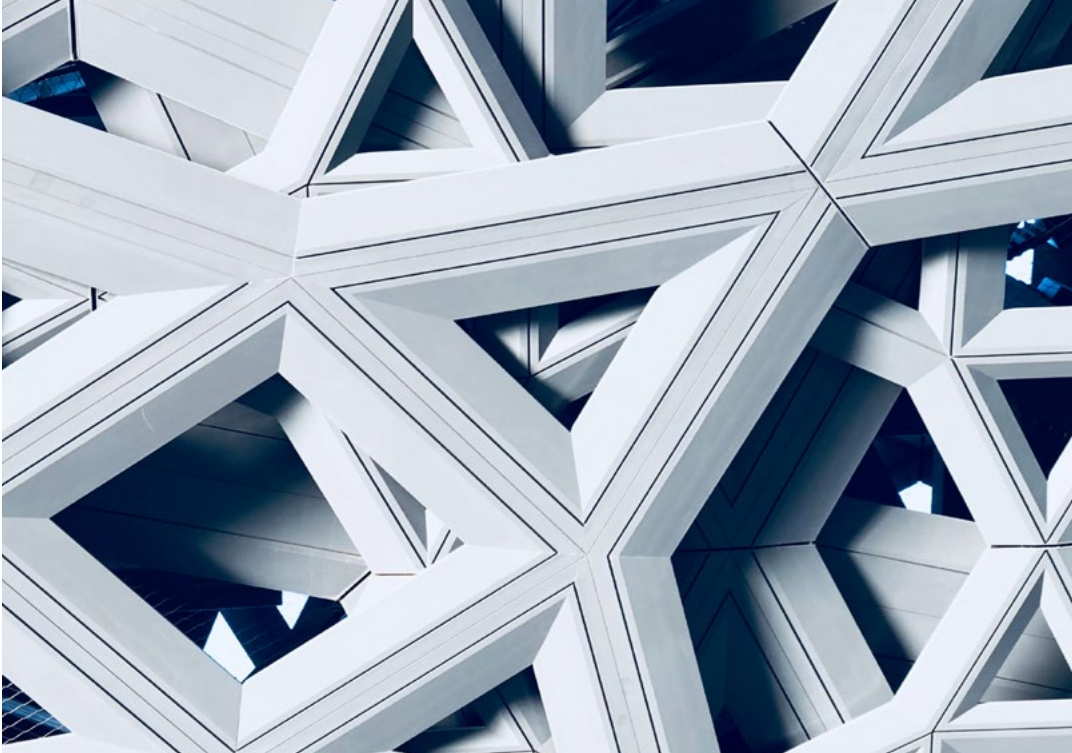
How to have more authentic digital connections in 2023

- Choose the digital platforms that add value to where you are right now.

- Show your true personality through your digital profile.

- Make genuine connections, digitally.

- Offer real value. That's not just selling your products, maybe it's making an introduction to someone in your network.

"You're the average of the five people who you spend the most time with," Jim Rohn.

This may resonate with many, but now that we are fully immersed in a digital world, we need to consider the scope of our connections and how much they are contributing to who we are becoming.

Where to from here?

If you're not sure where to start, I recommend a quick digital declutter so that you can focus on having more authentic digital connections. Here are my top tips.

1. Unsubscribe from those unread e-newsletters, rather than just deleting them.

2. Review your digital communities and decide which ones are adding the most value to where you are right now.

3. Review your online connections, and decide who should be in your circle right now.

Don't worry, you can always re-follow, rejoin, or re-subscribe at a later date!

Angela Shelton ■

Angela is a passionate leader, skilled at mobilising people and resources to achieve great success. A relentless optimist, she thrives on helping Association Professionals to showcase and improve their success by supporting their learning with innovative events and connecting people to their tribe. She is the CEO of Answers for Associations – a free online community for Association professionals.

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2023 Looks Like a Good Time to Invent a New Type of Leadership Portal

por·tal; the approach or entrance to a bridge or tunnel.

That definition of a "portal" is very appropriate for what associations are facing as we enter 2023. In the past, we have talked about "bridging the gap between members and leaders;" we've joked about volunteers looking down that "tunnel" of the organisation's leadership ladder, with the oncoming headlight of responsibility and another five years on the Board staring back at them. That is why building a new leadership portal is a crucial step.

Look at the definition. The portal is not your organisation's leadership development structure – it is the pathway, the entrance, to it. We need to extend that portal out further to gain the input, the interest, and the commitment from our evolving leaders or we are going to miss the opportunity to engage them in any meaningful way.

Leadership portals are not a new concept. Many associations already have them as part of their volunteer management efforts. Several of the client organisations I have worked with over the years have established Leadership Portals. These include the Society of Office and Industrial REALTORS; the American Bar Association; and the Society of Women Engineers. These great organisations all understand that the development of their leaders is of the highest priority, especially given the increased pressure on members' time in an era of global economic, political, and environmental uncertainty.

A number of private companies, educational institutions, and civic and religious organisations have their leadership portals for their constituents, too.

These portals all serve multiple purposes, including:

- consolidating leadership information, skills training, learning tools, and historical information in one place

- reinforcing to leaders that they are not alone in their volunteer efforts, and identifying other current and past leaders who can empathise with the time challenges organisational leadership presents

- creating a space where leaders can find others with whom they can partner or collaborate on projects, events, processes, etc

- providing online training, access to resources, and opportunities for potential personal and professional development, and

- in Chapter-based organisations, the leadership portal also supplies specific information on Chapter requirements, best practice success stories, and any updates on current policies and procedures.

These leadership portals are all well-presented and well-stocked with pertinent information, how-to suggestions, and a lot of examples of effective leadership principles. In my opinion, the only real problem with them is that they are a little too late in the leadership journey. The portal – the approach or entrance – needs to be filled with the next generation of organisational leaders, not the current generation.

Associations worldwide have been dealing with the generational differences of their leadership for more than a century. In 2023, those generational differences are going to challenge almost every organisation at an even higher level.

The so-called Baby Boomer generation, people who have been dominant in industry, politics, and the not-for-profit community for most of the past 30-40 years, are just about ready to pass the leadership of these organisations on to.......who? The youngest of these Baby Boomers are now in their mid-60's,

and one of the problems they leave behind is that they stayed in their leadership roles for too long. These men and women worked hard to achieve leadership status in their organisations, and once they got there, they did not want to leave. Look at the current leadership of the United States – President Joe Biden is 78 (in his first term!); Speaker Nancy Pelosi, the second most powerful politician, is in her 80's. Both have been in leadership roles for decades. It is almost as though a generation of potential leaders got skipped somehow.

Has the same happened to your organisation?

My suggestion is for all associations to take a really hard look at how you are attracting new people to leadership positions. Calls for volunteers do not work; hoping interested people will step forward is futile; asking current leaders to stay on only creates more of the same situations we face now.

Here are some things we need to do to make our Leadership Portals not just places where leaders go for information but also the places where people can start their leadership experiences.

- Create profiles for your leadership positions, outlining the key skills and characteristics you seek in each of those positions. Be able to talk about these when considering potential candidates and try to match the candidate to the position.

- Use your new member onboarding procedure to start identifying potential volunteer leaders. Create a human resource database you can reference when trying to fill leadership positions. It makes it easier to ask people to take on a leadership role in which they feel they have some opportunity to succeed.

- Your leadership portal should allow emerging leaders to start with some of the "smallest," least time-consuming volunteer positions. Let members get started with positions in which they are comfortable. Be sure to provide appropriate recognition for even the smallest volunteer role. That is how you get people to move on to the next level.

- Remember that you cannot teach characteristics, but you can teach skills. You not only can develop strong future leadership, but you can also give them transferable skills that translate into success in their professional and personal lives.

The most common Leadership Portals help members bridge the engagement gap between being a member and being a leader. In 2023, try pushing that portal out a bit, and have it include an introduction to leadership, too.

It will help attract a whole generation of leaders for your organisation, and for your profession, industry, or community.

Mark Levin CAE CSP ■

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Rethinking
Innovation

We hear the term "innovation" everywhere and are made to believe it is important. For many associations, innovation means getting together for a brainstorming workshop to come up with ideas out of the blue, in the hope that one will stick. But there is more to it than that.

What is innovation?

Let's start by understanding what we mean by innovation. Many people think that innovation is all about that "apple falling from the tree moment", the technology, the ideas, or they need another Steve Jobs on their team because innovation requires some superhuman intuitive ability.

But innovation is simply a process for managing uncertainty and de-risking new ideas. It can be used to modify business models, adapt to change or unexpected events like COVID-19, and to improve existing products and services.

Because it is a process, innovation can be taught and integrated into an association's culture and way of thinking.

For an idea to be innovative, it must also be useful. Creative ideas don't always lead to innovations because they don't necessarily produce viable solutions to problems which is why brainstorming workshops often lead nowhere.

Types of innovation

Not all innovations are equal. Different types of innovation require different skills, resources, and support. They also need different degrees of autonomy to succeed.

Innovation can be grouped into three main categories:

- Efficiency innovation – these are incremental innovations that improve operational aspects of the association's business model. They are low risk with low uncertainty, don't change the business model in a substantial way, can deliver an immediate impact and should occur across all parts of the organisation.

- Sustaining innovation – these types of innovation are about exploring opportunities to extend the association's business model, to strengthen the association and deliver additional value to members. Typical examples of sustaining innovations include developing new products and services, new distribution channels, or geographic expansion. They are generally low to medium risk and generate substantial gains but can also require considerable investment.

- Transformative innovation – these types of innovation are the most difficult and explore opportunities outside of an association's traditional field. These types of innovations position associations for the long term and protect them from disruption. They tend to be high risk with lots of uncertainty but also have the potential for the biggest gains. They are best developed by autonomous teams operating outside traditional business units – often these teams will be working in protected spaces like corporate accelerator programs.

Associations should have a portfolio of projects across all three categories in order to remain relevant whilst protecting themselves from disruption.

An association should have a number of efficiency innovations representing low risk continuous improvement. Sustaining innovations require more effort and resources and should be selectively piloted to develop the best ideas. Transformative innovations have the greatest uncertainty but the greatest potential impact and involve lots of small bets that are validated and de-risked through prototyping and pilots.

Implementing innovation

People can make developing innovative solutions a great deal more confusing than it has to be.

Fundamentally there are seven key stages to developing successful innovations:

Stage 1 – Create your mission and vision.

This stage is about identifying what matters most to your organisation. It is aimed at helping you define and understand your why and your mission – the reason why you do the things you do, or the reason your association exists.

Too often organisations waste time and effort pursuing what they believe to be a good idea without ever taking the time to consider if this is moving the organisation forward: they get wedded to the idea and not the outcome.

Defining your mission clearly allows you to manage your portfolio of innovations. Ideas that no longer support the mission get retired.

Rethinking **Innovation**

Stage 2 – Identify the opportunity.

This stage is about identifying opportunities that can help the association deliver its mission.

For efficiency innovations this can be as simple as conducting a five-minute after-action review following the completion of a task where the team simply asks what did we do well, what didn't we do well, and what needs to change next time.

For sustaining and transformative innovations, we look to understand the ecosystem in which we operate and identify points of influence.

Stage 3 – Identify your market segment.

Once we have identified the points of influence in the ecosystem we can then determine "who" exerts this influence. These stakeholders then become the target market segment for your idea and we can then begin to understand the market characteristics and needs.

Stage 4 – Develop solutions for your market segment that also delivers your mission outcomes.

In this stage we develop a range of potential solutions for our target market segment.

For associations that have a social or environmental purpose it is important to understand that the needs of your market segment may not directly align with your mission.

For example, we created an award-winning television show to drive mainstream demand for sustainable housing. But the key need of our target market (our audience) was the need for entertainment and to decide if they should renovate or rebuild their home. So our solution was an entertaining lifestyle show called Renovate or Rebuild. The show met the audience's needs and used the storytelling within the show to educate the audience about the benefits of

sustainable homes. The audience is not watching the show to learn about sustainable housing, that outcome is a consequence of them watching an entertaining television show about home renovations.

Stage 5 – Make sure it works before you launch.

The number one reason startups fail is that there is no market need for their product. In other words they created a solution looking for a problem.

To prevent your idea from failing you should validate your solution through prototyping and piloting.

Stage 6 – Design a business model.

We usually associate an industry's transformation with the adoption of a new technology or innovation. But although new technologies are often major factors, they have never transformed an industry on their own. What does achieve such a transformation is a business model that can link a new technology to an emerging market need.

Consider the following:

- Facebook is the world's largest media company but creates no content

- Bitcoin is the world's largest bank, with no actual cash

- AirBNB is the world's largest accommodation provider yet owns no real estate

- AliBaba is world's most valuable retailer but has no inventory of its own, and

- Uber is the world's largest taxi company yet it owns no vehicles.

What allows these companies to achieve such large-scale transformation is not new technology or innovation, it is the business models upon which they are built.
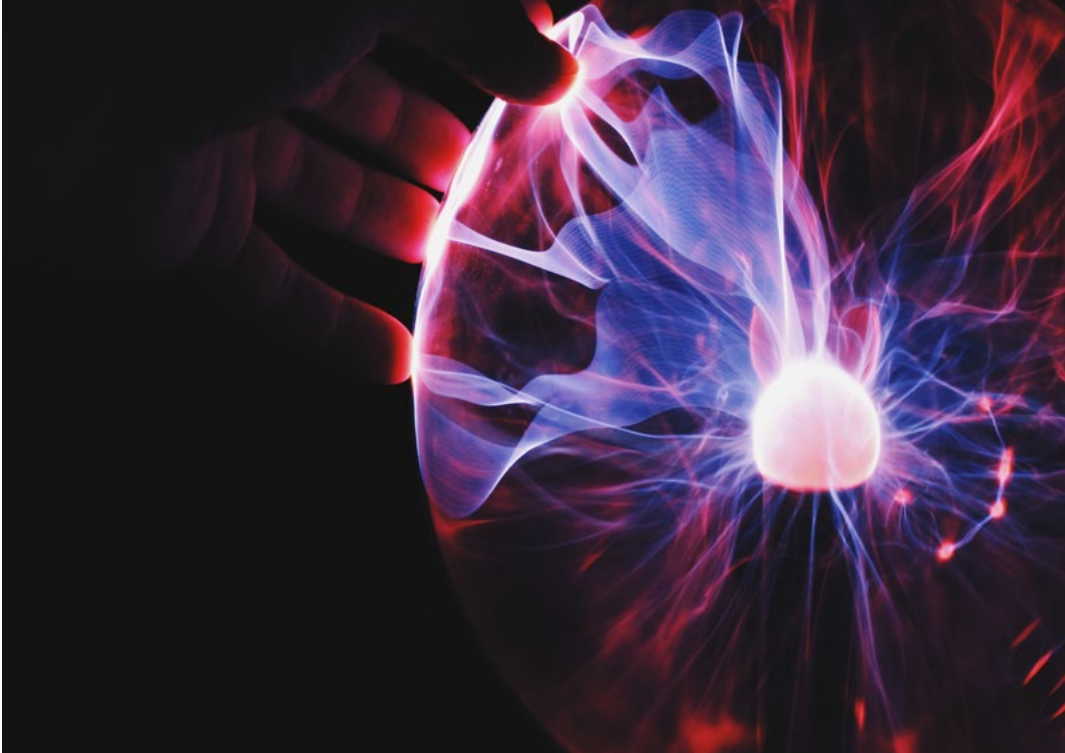
A business model is how a company creates value for itself while delivering products or services for its customers.

This video from our Youtube channel explains the 11 key parts of a successful business model.

Stage 7 – Launch your solution with the right marketing and communications.

You are ready to launch your innovation and now is the time to let people in your target audience know about it. This is where you can employ the latest behavioural science insights through your marketing and communications to make real change happen.

Conclusion

This seven-stage process draws upon the latest insights from innovation and entrepreneurial thinking and applies it to your innovation challenges to provide you with a disciplined and evidence-based framework.

Innovation is not some magic black box from which amazing ideas miraculously emerge.

Innovation is a process for managing risk and uncertainty, it can be taught, it can be learned, and it can be implemented successfully by any organisation.

James McGregor is the Founder of the Blue Tribe Company and specialises in helping others create products, services, and startups that solve some of the world's biggest environmental and social challenges. He studied Sustainable Business at the University of Cambridge, is the author of 23 peer reviewed research papers and is an industry thought leader in sustainable business design. As a thought leader he has been featured regularly in the media including Australia's Channel 9, The Australian, The Sydney Morning Herald and the ABC.

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James McGregor ■

The Path to the Top
is Paved with Better Questions, Not Fast Answers

Nine profession-changing questions I learned through deep listening at 600 associations.

I wracked my brain for something to give you, and I knew you'd love it if I distilled my top lessons from 40 years of serving 600 professions.

What are the nine profession-changing questions that will drive any association to excellence or drive it into the ground, then extinction?

Why do association leaders think they need to be the smartest person in their profession and come up with solutions to near-impossible situations?

If you, like me, have already invested a few decades of your life in daily meetings, weekly conference calls, conventions, chapter events, workshops, task forces and conversations (including email exchanges) with more than 35 people every day, you may have formed your own list of questions.

I've refined my list every day by asking others if they can think of a better, deeper way to get to the core of the truth we both seem to be seeking?

How do you get from 9,000 questions to the nine that drive associations?

My story starts with an obsession with professions and the life of learning, curiosity, robust conversations, belonging, and mentoring that I've witnessed in more than 600 different professions which formed an association or independent credentialing agency. With equal passion and absolute commitment to duty, I love storytelling and unending quest for truth and an engaging headline that comes with my calling as a journalist.

In my mid-twenties I got the opportunity to step into association management. At the time, I did not know it was a profession. There was no training course or career ladder or certification for association people, so I created my own professional framework, which meant interviewing hundreds of strangers who had two characteristics: They chose to become a professional and they affiliated with a state or national professional society, guild, or association.

That experience put together the two things I loved most and set me on a mission to become the storyteller for the professions.
Because professionals tended to adhere to each other in organisations formed to make them smarter and faster through shared insights and practices, the best place to find, then write the story of each profession was inside their association.

My big break came at 29 with the headhunter's phone call to come to Washington, DC, to step into senior management of a national association as Communication Director. The challenge ahead became clear at my first board of director's meeting: Everyone at the table was over 50 and only two in the room were more than 20 years younger — me and the executive director who hired me.

That was the beginning of my 40-year story on how I discovered that the path to the top is paved with better questions and not fast answers. Listening deeply and taking notes comes naturally to a journalist because it's all about their story and not you. My job was to tell the story of one profession which is how we achieved record-setting growth by all measures.

The biggest lesson learned from that experience was associations that made statements and pitched products, events, conventions, and acted like experts with all the answers did not do as well as the association that told the story of its origins, causes, champions, challenges, present conditions and future scenarios. The story made other professionals want to become part of them and to step into the story with their own voice and version of why they loved the profession they practised.

The next break came at 34 when I got the opportunity to tell the story of every association on the planet with the offer to join the first consulting firm to devote 100 per cent of its business to national associations. A handful of association executives had left their regular paycheck positions with perks to start The Communicators, Inc. and a few years later they hired me to continue my quest to tell the stories of every profession who would hire us.

Associations and constituents changed significantly and the nine questions got better

For your next meeting or your next website or your next opportunity to meet with a philanthropist who wants to fund a project and become part of your story, take these nine questions with you. You don't have to ask them all. I've learned, you don't need any other questions, either. As you learn and turn knowledge into writing, actions, and deliverables, see if you can further refine the questions that tell the story of your association.

Here are the nine questions and how to make them clear.

1. What business are we in?

Specifically, why were we formed and is that still a reason for continuing? More specifically, who do we choose to serve and why do they prefer to come to us or trust us, over all other options, to delight them?

More than 90 per cent of associations struggle to answer this. Is it any wonder that you have trouble doing business if you don't know what you do better than anyone else? Here's a quick look at the most common incorrect answers: 501 c 3 – nope. That's a relationship with the IRS. Membership business — nope. That's a noun and not a business value. How about convention business? Nope. Still a noun and not a business value. What about education business or professional development business? Nope. Still nouns and millions of other businesses, not just associations, do that.

2. Does everyone in this profession recognise the most valuable members when they appear?

This question goes to the core of the association's ability to identify every person who is practicing in their profession, whether or not they are an association member. This question goes to the heart of how well the professional group has created collective knowledge and knows individually, down to their email address, who to go to for further information or learning.

3. Have we confused money with our profession's story?

Every story has a beginning, middle and end. The story has characters and a storyline. Have we mixed in other professions with our profession, thus causing confusion and leadership corruption? What roles do suppliers and advisors and trainers for our profession play? Does money make someone the same or more valued than individuals in our profession?

4. Which comes first? The story or the business plan?

The biggest reason strategic planning and action plans don't deliver on the aspirations that created them is they have no story. The story is the feature-length movie of your profession. It's a story with seasons, episodes and sequels. The story is nonfiction and engages an audience. That audience is often other professionals and can include millions of others who benefit because your profession exists but they were never trained, practiced, or certified in your profession.

The Path to the Top is Paved with Better Questions, Not Fast Answers

5. Who owns your profession's passion and mission?

This question goes to the core of who will take us into the future or put us out of business? All of the nine questions form a network of the master story. This question plays off of the first question. Are you merely processing things and administering steps or do you own it, with your whole being? It takes only a handful of the smartest, coolest, most visionary people in your profession to start their own enterprise to win the hearts and minds of your members.

6. Does technology serve us or do we work to serve the technology suppliers?

Before you hire anyone, including hiring technology, to work for you, do you have a super clear job description, including promotion and exit reasons?

The speed of technology in the past 30 years is exciting and exhausting. Did you want to learn that much about software features and functions? Were you prepared to rethink all relationships and rewrite the rules of engagement? When tempted to look at a "demo" or download a trial version, have you completed the three steps that must come before wasting even five minutes on a demo?

Is this software built specifically for my needs, my customer, and my available time? Or did someone build a program and expect you will figure out how to slam a square peg in a round hole? Even worse, if you feel wowed by two different software applications, are you prepared for the costs and disruption for your association, just to figure out how to make the software work together, plus work with your people, and interact with all of your members and customers who may decide their relationship with you is not enhanced by the technology?

7. Who is the voice of our profession?

Before Google, before email and before social media, associations bet their life and financial future on claiming to be the voice of the profession. Whether you call them members or customers of your association, they have changed faster and in more diverse ways, without the corresponding changes in the association that says they represent them.

Members of your profession are finding their own voices, writing, publishing, blogging, podcasting, and broadcasting every day. If anything, your association may be the collector of money which you put in a fund to make donations to people elected to Congress, the Senate, Executive Branch, plus state and local legislators. Individuals are more directly involved in speaking up, connecting with others and donating directly.

8. What is the timeline for our association or even our profession?

Most of you know the year it started, but do you know the year it will die?

The first time you do the lifeline exercise is brutal. It makes you think about extremely important questions and signals that are easier to ignore or excuse away, for one more day.

To get this right, practice once on yourself before you do this for your association. The same principles and steps apply for individuals or complex organisations. After all, your body and life are about as complex as it gets when it comes to answering the questions.

Draw a line. You can do it with paper, with a computer or a monster whiteboard covering the entire wall in your office. Start at the left and put the day you were born. Then put some marks on the line to show 10-year milestones. At the right, put the date you will die or when your association will become extinct.

Now plot the story. What happened before today and is our history? What is happening this year? What is likely to happen in the years or decades ahead? What are the most critical elements for our growth? What are the inevitable signs that we will die? In the case of a whole profession, I strongly suggest reading The Future of The Professions, 2015, Oxford Press.

9. What's our enduring reason for being? What do we do for the profession that no other business model can replicate or knock off?

Do you see how all nine questions form a network? Do you see how this one answers the main, double-barrel question, which is "Who needs you? And who do you need?"

This is a question with no fast answer. You must answer it every year and through every disruption, pandemic, and opportunity. This is the theme for your story and the feature-length movie of your profession. Here's some answers that have come from listening to hundreds of professions. See if they go to the core of your profession.

We are here to learn from each other. Our purpose is to make everyone who comes into our profession faster, smarter and connected to divergent and different thoughts and better questions. Artificial intelligence (AI) can't do that. Our profession excels at empathy, serendipity, and insights from decades of experience and communicating to achieve a smile or raised eyebrows on another's face. AI will never replace authentic, original, and socialisation.

Because we created the profession, we are best positioned to recognise opportunities for it. We are the best at revisiting the questions our founders and peers have asked and then ask better ones. We are best at helping people arrive at dramatically better options. We are bold enough to say no dramatically better solution is possible without better questions. We are masters and knowing without changing your questions, you will never make it beyond incremental progress along the same path we've been pursuing.

Sometimes the outcome of asking a different question is an immediate insight – a novel solution that has people slapping their foreheads at how obvious it should have been – Hal Gregersen, MIT Leadership Center.

I'll show you my top nine questions if you show me yours. Send yours to me at Georgia@Communicators.com. I respond to all direct messages. There are no templates or autoresponders in my communication. Just you and me and what matters.

Georgia Patrick, CEO, The Communicators, journalist, story finder, thinking partner, entrepreneur, trusted guide for professionals seeking better paths to destinations barely travelled. She turns wishes into actions. She is co-founder of the Gifted Professionals and Communicators community.

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What Associations and Nonprofits Can Learn from
Deep Adaptation

The past few months have seen more than their share of climate-related catastrophes. From the unfolding tragedy in Pakistan where more than one-third of their country is underwater, to extreme heat waves in China, Europe, and the United States it should be obvious that we are moving into an increasingly unstable world.

However, what these events are calling for is a combination of critical thinking, compassion, and courage. Associations and nonprofits can lead their members, donors, causes, and industries and professions in more powerful ways than they ever thought possible, or necessary.

One of the frameworks we can consider using to help us deal with what is happening and how we can adapt to it, is the one articulated by Dr. Jem Bendell in his paper, "Deep Adaptation: A Map for Navigating Climate Tragedy." In it, he sets out four questions for us to consider as we continue to navigate uncertain waters. In directly addressing these four questions with your boards and volunteer leaders, I believe it is possible to spur heroic action from our profession that, by and large, is still asleep.

Question 1: What do we value most that we want to keep and how?

Getting very clear on what our values are, and what we wish to preserve no matter how chaotic the future gets is going to be critical. You have already experienced a shock from the recent global pandemic, and many of you realised in the middle of that crisis that there were values you didn't want to compromise. Now that things are feeling more 'normal' it is going to be tempting to go back to 'busy' as opposed to 'meaningful.' The repeated forest fires in California have left me scrambling through my house deciding what must go, what would be nice to go, and what could burn. You need to do something similar with your strategic plans.

Question 2: What do we need to let go of so as to not make matters worse?

Start with your office space for one thing. You realised you can work remotely, so why are you pushing to return to an old paradigm that wasn't working anyway? According to the Intergovernmental Panel on Climate Change, (IPCC) we must reduce carbon emissions by 45 per cent globally by 2030 and reach net zero by 2050 to prevent the most extreme weather events. It's 2022. Do the maths. Your annual conference emits a large amount of CO_2. You can use online calculators to determine the amount of carbon your members are creating due to travel and attendance and provide a carbon offset by investing some of your conference revenues to tree planting or other initiatives.

Question 3: What could we bring back to help us with these difficult times?

GenX, it's your time to shine. We remember the days of grassroots lobbying programs that we ran with a box of recipe cards on our desks. I'm not suggesting we abandon technology, but there is a mindset that remembers what the world was like before all (gesturing wildly) this. There is a natural tendency to want to go back, especially when the future seems so unpredictable, but we need to remember things weren't all that great in the good old days. How can we preserve the progress we have made, while at the same time honouring some of the basics. As it turns out, we can do with a lot less than we think.

Question 4: With what and with whom shall we make peace as we awaken to our mutual mortality?

Not to put too fine a point on it, but isn't this the entire point of our existence? What is it that drives us crazy in associations and nonprofits? Conflict. Misunderstanding. Power struggles. I think it's time for us to just stop. Stop the petty disagreements. Stop tolerating leaders who bring the drama. It's time for us to make peace in our organisations, in our industries and professions, in our personal lives. Unleash your compassion on your members and stakeholders. Remember the strength in our communities. And yes, love yourselves and your peers a little more.

What Associations and Nonprofits Can Learn from **Deep Adaptation**

10 Things You can be Doing Now

A few months ago I had the honour to be on the Association Chat broadcast with Dr. Rupert Read (@GreenRupertRead) and Kiki L'Italien (@kikilitalien) as we discussed the state of the climate crisis in the wake of the failure of COP26 in Glasgow during the Fall of 2021. As a part of that broadcast, I mentioned 10 things associations need to be doing right now to help address the catastrophic situation that we find ourselves in.

1. Your strategic plan needs an overhaul. When I say overhaul, what I really mean is to set it on fire. The idea that we can effectively plan for anything on the timescales we are used to was outdated 10 years ago. Now, it is simply folly. I have developed a process to use transformative adaptation as the basis for any strategic planning efforts you may wish to engage in going forward. Please stay tuned for more and if you are interested, please reach out to me.

2. Deploy your lobbyists. Associations in the United States have a literal ARMY of lobbyists on standby to deploy at a moment's notice. The problem is, we hide behind this idea of "relevance." Climate chaos represents a clear and present danger to every single person you represent. If we stopped hiding and started using our lobbyists to engage on climate issues we could push the needle and push it fast.

3. Sustainability will not save us. In the 1970s we had the environmental movement – but we failed. In the 1990s and early 2000s sustainability was the drumbeat – but we failed. The last shot to gain a foothold on the beach is regeneration of our social, environmental, spiritual, and economic systems. Regeneration is our final frontier. I'm not saying sustainability doesn't have important tenets in it, and I'm not encouraging us to abandon those efforts, however they will not be sufficient in and of themselves. It's time we admit it.

4. Get your members on board. Forward thinking associations are going to begin analysing their members' industries and professions to see how they can rapidly, drastically reduce their carbon emissions and begin to engage in regenerative practices. Provide the leadership your members need. Without a healthy environment and a functioning society, your members' businesses have no chance to thrive.

5. Join Fridays for Future and strike. Encourage your staff and your members to begin to participate in concerted, non-violent climate action. Why are we leaving this to Fridays for Future and their school strikes? We should ALL be striking on Fridays to bring attention to these issues.

6. Stay Remote. There is NO reason to go back to the pre-pandemic office life. Absolutely none. There is no reason to air condition our homes and our offices. Estimates are as temperatures continue to increase, global carbon emissions from air conditioning by itself will add .5 degrees to the overall total by 2100. In a world where every .5 degree increase is exponentially worse, we need to realise air conditioning may be a survival tactic, but it is robbing Peter to pay Paul.

7. Hold more regional meetings. Carbon emissions from travel are a problem. Large annual conferences have a huge carbon footprint, even if they are "sustainable." Break it up and get local.

8. Radically reinvest in chapters. I admit it, I have never been a huge fan of chapters because of governance issues and other challenges. I was wrong about centralisation. Your association's long term success will depend on decentralised, locally focused chapters of members. Get the resources together and ensure your chapters are strong. All global concerns end up playing out locally. Empower your local leaders to lead.

9. Enlist sponsors and affiliates. Work with your sponsors and affiliates to ensure they are getting beyond sustainability and are embracing regeneration instead. Evaluate your partners and make your support contingent on their sincere efforts to address our collective climate emergency.

10. Invest in mental health. Ecological grief is real and growing. As societal pressures continue to mount, your members will need access to mental health services. Develop programs, develop partnerships, and recognise our collective mental health is going to continue to degrade unless we all start taking care of each other. Your association will need to support members in ways you never imagined. Get ready to help.

Bonus Hint: Realise that Generation Z and the more climate aware of us no longer care what your mission is. There is only one mission left.

Shelly Alcorn is CEO of Michelle Alcorn and Associates and specialises in strategy and governance for the association community. She is a frequent keynote speaker focusing on critical issues faced by organisations and society at large. Her main interests have been how to be more human in an increasingly machine-driven world and what impacts the rise of artificial intelligence will have on the workplace of the future. She is now laser focused on our global climate emergency and the role associations need to play in the face of the sixth mass extinction. Find her on Twitter @shellyalcorn

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Don't Wait to Move the Rug!

Seven Steps for Organisational Excellence

Consultants see everything — from organisations that make Dunder Mifflin look like a tight ship to associations that could teach us a thing or two.

During a recent presentation, I asked the audience to share their opinions about what it means to be an excellent organisation. As you might expect, there were a variety of responses.

This was my own answer. Excellence means providing value to customers, members, industry, and the public. My presentation outlined seven steps to deliver what those constituents want and need today and in the future.

Before you take that journey, you need to be ready to make a leap. This story illustrates my point.

Be Courageous

I was helping an association manage a leadership change. The previous CEO was a "traditionalist." His management style was reflected throughout the organisation.

Multiple redundant and outdated work practices begged to be addressed, but a small thing caught my attention. Each day, someone tripped over an area rug outside the conference room.

When I suggested getting rid of the obstacle, the tremendous resistance to this change surprised me. Fear about moving the rug was the residue of an era when the status quo ruled, and the CEO was the source for all decisions.

We parked the accident waiting to happen in a closet. There was a sigh of relief when the new CEO didn't notice. With the literal stumbling block gone, other changes came more easily.

These seven strategies will help you see challenges with fresh eyes and remove anything that stands in the way of success.

1. Understand the market

Business as usual is never a good option. Even when the disaster on the front page isn't in your backyard, technology, the market, and customer preferences constantly evolve. Forward-facing leaders make monitoring new professional developments and their place in the business community a routine process.

2. Organise effectively

To innovate, solve problems, and manage change you need a multi-talented team who can use today's tools to build new models and products that didn't exist in the past. Create a leadership framework that fits your organisation but be sure that it is cross-functional and diverse.

3. Ask questions

Sharon Rice, .orgSource Managing Director of Business Strategy, believes we've got planning backward. "Business transformation doesn't start with a strategy," she advises. "It begins with compelling questions that trigger innovation and drive growth."

Challenge your team by exploring these fundamentals about your operations and business model. Ask:

- Why does our organisation exist?

- If our association did not exist, would industry leaders create it?

- If not, why not?

- To be relevant, should our business model change over the next five years?

4. Analyse the options

To find answers, associations have a wealth of data to draw on. The right technology makes this important resource available. An efficient tech stack will produce analytics and dashboards to develop key performance indicators and allow you to set goals based on real-time information.

These are areas where data gathering and the related KPIs can help to assess and predict performance:

- Customers/constituents
- Products/services
- Distribution systems
- Organisational efficiency/operations
- Financial performance

5. Explore the Future

KPIs also help predict future scenarios. One way to avoid the most challenging calls is to stay ahead of them.

Scenario planning is a critical competency for both change and crisis management. When your team needs leadership through a volatile situation, scenario planning is a tool that can be used to see around the corners and develop short, mid, and long-range strategies with flexibility baked into the design.

6. Create the roadmap

After you've asked questions and analysed data, strategy is your roadmap to the future.

An integrated planning process ensures that goals are actionable. It allows the board to do what they do best — set the vision. Identifying business strategy falls to the executive leadership team. Managers are responsible for operationalising initiatives. The process cuts across the organisation, and there is constant communication among departments to ensure alignment.

7. Foster innovation

Innovation means more than making something new. It is continuous quality improvement paired with the willingness to be deliberately uncomfortable. Take a moment to bask in your accomplishments, but never stop raising the bar.

Rolling out a new educational podcast because that's what is trending isn't the point. But if the initiative answered a challenging question or delivered greater member value and you used research, data, and iteration to guide the decision-making, that puts you in the right zone.

Remove obstacles

Don't let fear be an obstacle to excellence. Change incrementally. Pick simple projects with a goal of learning. Test, evaluate, and determine the best fit for your group. Success has its own momentum. Move the rug and begin your journey.

Sherry Budziak ■

Sherry Budziak is the Founder and CEO of .orgSource, a management and digital strategy consultancy, and the Co-Founder of .orgCommunity, a professional development organisation. She has helped more than 200 associations achieve their objectives by identifying opportunities for efficiency and innovation. Sherry is a sought-after writer, presenter, and thought leader.

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Why a Strategic Core is Needed
Today More than Ever

Pivot. Nimble. Shift.

Coming out of two years of ongoing societal disruption, there are frames and phrases organisational leaderships are exhausted of hearing. Yet, the underlying commonality of these areas is a focus on the needs of change in the moment. There is only so long anyone can live in a crisis and have rapid-decision making serve as a recipe for success. Coming up for a breath of air, organisations are recognising it is time to once again turn eyes to the horizon. How does the future we want to create look different? What new strengths have we discovered that we should invest in and leverage to bring about that future? Have we discovered new audiences who will be key partners, enabling the successful advancement of mission? These questions and more drive towards crafting, adopting, and living an organisational strategic core.

A strategic core does not try to encompass in the central strategy and goals of an organisation the operational metrics and milestones of the past. Those more tactical elements are still necessary, as places of "how" rather than "why," and emerge subsequent to the visioning and approval of a direction. The key components of an organisation's strategic core function at a higher level.

Shared and ever-evolving vision of a mission-impactful future.

This is a narrative description of elements of the inspirational tomorrow the organisation is striving to create. Through a process of meaningful inquiry and additive listening, organisational leaders embrace their role as storytellers and champions for the organisation to create this narrative. Once composed, the narrative serves both as a referendum on the significance and potential of the organisation, and an entry point for new voices –of leadership and membership. These voices can add to that story, shifting the focus as new threats and opportunities arise. This narrative may not be part of the one-pager strategy summary on a website, but it is a living and ongoing true north connecting organisational value and meaning.

Vision and mission statements.

Almost every industry and organisation type has some version of a vision and mission statement. For non-profit organisations, these statements together should serve three primary purposes.

- Leadership litmus test. Before making critical resource investment decisions, organisational leaders should look at the vision and mission statements and reflect on whether the resources to be invested move the organisation closer to those statements in the most efficient, effective, and impactful way possible.

- Reason to affiliate. The vision and mission statements should contain an aspirational future the organisation is uniquely positioned to create. Those who find the vision and mission compelling will want to be part of the journey. This desire to affiliate may take on the frame of a member deciding to join or another organisation deciding to become an ally.

- External definition of identity and purpose. Whether with legislators, regulators, educational partners, or the public, there will be key moments where an organisation is connecting with those not in the industry. In these moments, the vision and mission statements serve as the introduction, ensuring those who may never be a part of the organisation understand who they are meeting with for a more fruitful relationship.

Strategic priority areas.

An organisation may have the capacity to do anything (within reason), but it certainly can not do everything. Priority areas, or sometimes goal areas, give focus to where an organisation is going and enable it to shift efforts and resources to create the visioned future, often creating a better balance of depth and breadth. In articulating these areas there are two general schools of thought:

- Priority areas by operational strengths. This is the more traditional avenue of delineating focus and strategy. Functional areas taking or providing the most resources will drive the priority areas for the organisation. It is not unusual to see these specified in terms such as advocacy, learning, meetings, or membership.

- Priority areas by purpose. This is a bigger leap for many organisations. Those who choose to take this approach transcend functional areas and answer the question of what is trying to be achieved in a given functional area. As an example, an organisation does not exist for advocacy. It exists to communicate the value of its [insert industry, message, constituency, etc.]. By framing a goal area as 'communicating the value,' the organisation shifts into a cross-functional operationalisation of the goals. Indeed, traditional advocacy efforts fit in this arena, so too do education, public relations, and partnership efforts. Instead of perpetuating operational silos, the organisation can map resource investment and expenditure efforts across priority areas to drive mission.

Why a Strategic Core is Needed
Today More than Ever

Statements of purpose. Once the priority areas are established, an organisation then looks to craft a brief statement for each to clarify what achievement looks like in the area. These are not yet milestones or tactics, instead they are statements of effort designating achievement.

Statements of success and strategies.

Once the priorities have been authored, leaders establish two additional, high-level guidance pieces.

- Statements of success. Statements are multi-year narratives describing the indicators of success for a future state of the organisation. The success statements will often serve as the basis for establishing yearly metrics in an action/operational plan.

- Key strategies. The strategies are focal, high-potential efforts essential to enacting a shared and evolving vision of the future.

Strategy-wide measures of progress.

There are often a number of operational or organisational priorities against which leaders want to see EVERY goal or priority area measured. These often include progress or success measures for fiscal sustainability/responsibility, effective communications, or governance excellence. Setting these measures is a clear indication from leaders about which areas deserve the most attention and planning.

In the description of the strategic core, there is not a focus on tactics or short-term milestones. As disruption moves from occasional to a weekly occurrence, the strategic core can surf the wave of disruption with rapid strategy-driven responses. An organisation can affirm and continue to pursue its vision even as it changes how it does so. The strategic core also provides a stability in focus and articulation of direction through the greatest of instabilities.

It is worthwhile to pause to note the unique place Diversity, Equity, Inclusion, Justice, and Access (DEIJA) plays for all organisations. While the definition and priority/approach ascribed to DEIJA may be specific from organisation to organisation, the topic is a piece of reflection and intention in strategic core work. DEIJA plays a role in organisational values (what you experience when you come to the organisation – the culture) and in governance (how DEIJA impacts the pathways to, ethos, and decisions of leadership). It also appears in strategy work.

- **DEIJA as a strategy-wide measure.** Every priority area of the organisation must measure progress and intention against DEIJA as it pertains to each strategic priority.

- **DEIJA as a strategic priority area.** There are times when organisations are called to bring additional focus to growth and improvement in DEIJA and must measure progress separate from other strategic priorities.

- **DEIJA as both a strategy wide measure and key strategic priority area.** When an organisation is looking to measure the progress of all DEIJA efforts in relation to strategic priorities and make specific investments as part of the strategic core.

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The value of crafting a strategic core includes several key leadership development and connection opportunities. The most powerful of which is in the alignment of vision with the path to get to the vision. The identification of priority areas enforces the importance of prioritising, sequencing, and choosing activities with the greatest potential. Boards of excellence are incredibly talented at saying no. The more leaders can discern where NOT to expend effort and resources, the greater the capacity to invest in the places of greatest potential. The work of a strategic core – in authorship and continuation – builds this skill.

As a supplementary strategic effort, many organisations will build or refine an annual process of programmatic impact measurement. Combined with the strategic core, measuring the fiscal and mission impact of each programmatic investment further helps leaders decide which areas to sunset, pause, maintain, adapt, invest in, or create.

A strategic core also serves as a nexus from which an organisation can reflect on its current system of governance and evaluate relevance. Much like going to a doctor for a check-up, healthy organisations will take a larger step back every five to seven years to examine governance holistically and will ensure there are routines to conduct regular, annual pressure testing and adjustment of governance processes. It is common, after developing a new strategic core, to take a fresh look at committee and council structures, ensuring each aligns to the strategic priorities of the organisation. This can recommit the work of volunteer groups to organisational priorities, creating more meaningful volunteer experiences.

Finally, a strategic core crafted, refined, approved, and executed in a concordant action plan will not reach its potential without a mindset and system of communication, conversation, and evolution. Strategy done for a membership is much different than strategy crafted and advanced with the membership. It is critically important that the strategic core be crafted with meaningful places of input and engagement with members. Doing so will result in a strategic core and priority areas with accessible opportunities for members to take action and contribute to priority advancement.

The strategic core is the north star by which an organisation can better set direction and tell the story of past accomplishment, present strength, and future aspiration. Through a strategic core, leaders can assure all parts of the organisation are better aligned with the purpose, vision, and mission.

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Strategic Planning:
Opportunities for moving forward

In the past few years we have seen many changes in the association sector.

With this in mind, this year my contribution highlights several opportunities to help you drive change and keep moving forward. Some of these ideas will impact strategy, whilst others focus on tactics.

The planning process

1. Members expect their association to be ahead of the curve in knowing what is on the horizon. Keeping them informed, and helping them plan with confidence, generates significant value for members. There is an opportunity to ensure this vital process is undertaken regularly by embedding it in your governance process. Establish a panel of experts, from a variety of disciplines, to report back to the Board on the drivers of change that are likely to impact on your community. Use this to facilitate an annual future focus discussion forum, to guide your board, members and sector stakeholders through the critical issues and possible consequences. Deliver an experience that will sharpen the quality of strategic thinking for your sector.

2. Plan for the complete economic cycle. Your members will live through boom times, followed by a recession, which will bottom out, and then experience the recovery period. Know the different issues and concerns members have at each stage. How will being a member help them better navigate through each stage? Do you have a strong value proposition and how will the priority of different benefits change?

3. Demographic changes to membership should also be planned for. Prepare a generation projection report for 2028 and 2033. Where are the opportunities? Where are the big shifts? For example, Baby Boomers are now retiring in significant numbers and some might value volunteer opportunities to give back and make a difference, while others might want to stay in work and value retraining opportunities especially in STEM skills.

The membership model

4. One big change, and huge growth area, has been the rise of the subscription economy. Netflix, Spotify, Amazon, Apple and others are using the membership model. One big difference is they don't invite customers to renew their membership. There is no annual renewal notice. It's ongoing, until you want to stop. Is it time to review the pros and cons of this approach?

5. Another important feature of the subscription economy is it's a monthly fee. Often the amount slides under your notice radar because it is not big enough to draw attention to. Also when times get tough, a large annual bill that requires attention can cause anxiety and be distressing. It might trigger a cancellation. Is it time to encourage more members to pay monthly?

Communications and events

6. Our communication preferences have changed significantly. Many members prefer using apps, and an app that is effortless to use, offers you an opportunity to increase engagement, value and build community. Videos and podcasts have both become increasingly popular, so now is a great time to invest in your video editing and audio capabilities so you can easily capitalise on repurposing content and reach new audiences.

7. With the last point in mind, and because of the recent growth of virtual conferencing, every event you organise can be planned with three different audience experiences in mind:

a) being in the room – part of the live audience

b) being part of a virtual audience – watching it at the same time from a distance

c) being part of the on-demand audience – watching it later –preferably just the parts I wanted to watch, or perhaps occasionally, the complete event. This is where having great video editing resources will enable you to excel for this audience.

Each of these affords the member different experiences, advantages and levels of investment (financial, time and the ability to multitask). Where are the opportunities to add more valuable experiences for these three audiences? How can you create memories that will bring members back?

This final point is important. Moving forward will require focusing on the experience as a main driver of value for members. Priorities have shifted away from using and consuming more physical resources. How we make members feel, and in particular, feeling a sense of connection with other members, and with the causes we focus on, will ensure membership remains relevant and meaningful.

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ReVS:
A Pathway to Association Growth

Many associations have struggled during the pandemic and will continue to face challenges as this crisis, which began as a health issue, has evolved into an economic drawback. The good news is that many associations have also adopted plans and programs to mitigate the adverse effects of the pandemic and have opened opportunities for growth.

I had the chance to witness firsthand the situation of some associations here in the Philippines through my interaction with them as members of the Philippine Council of Associations and Association Executives (PCAAE). As such, I have developed from this experience, a framework which is by no means comprehensive and is a work in progress, needing adjusting and tweaking as changes in its midst happen.

 The pathway, which I acronymed "ReVS," has three key elements (as given below), organised in such as a way that the outcomes of one element relate to the other two and that all three contributes to the success of the pathway:

1. Re is for relevance and has two considerations: (a) purpose and mission, and (b) value proposition.

Purpose guides the organisation. It answers the question why: why does it exist? Why does it do what it does? And why does it serve a higher cause? A clear and succinct purpose statement (10 words or less) is essential for messaging across the organisation and its stakeholders.

Mission drives the organisation. It answers the question: what does the organisation undertake to accomplish its purpose? What difference does it make? And what change will happen? The mission statement revolves around representation, participation, and service provision.

Both the purpose and mission statements will be the bases to draw out the organisation's value proposition.

Value proposition covers four general areas:

a) Learning: (a) education programs (online and in-person) and (b) certification program.

b) Knowledge: (a) publications (bulletins, newsletters, journals, books, magazines) (b) website (c) survey and research.

c) Community: special interest groups, professional sections, member listserves, social networking sites, online and offline networks, networking and engagement opportunities, member-only connection events, discussion forums, volunteering opportunities, benchmarking and best-practices exchange.

d) Advocacy: lobbying, formulating policy, presenting testimony, providing specialised and technical information.

The above will be bases for product and service development which will also have three interrelated considerations: (a) a narrow focus (b) considered "fit for purpose" and (c) with a built-in automatic review, whether to enhance or discontinue.

2. V is for visibility and it involves communication and messaging as well as branding. It also means being "top of mind" in the area of its influence and being in the "guest list" of events related to its field. Leveraging brand identity and assets is very much a crucial part of visibility, including imaging, social media presence, and areas where its brand is called for.

3. S is for strength in three critical sources: (a) people (b) technology and (c) finance.

People includes: Board, management and staff, members and volunteers. Some considerations:

a) For the Board, it is a plus factor that an association has a nimble, competency-based Board. Other essentials are intentional onboarding, i.e., orienting new Board members to get their feet wet quickly and practicing DEI.

b) For management and staff, it is also good that an association has a professional management staff led by an Executive Director. Functions that are crucial for operations are membership, programming, communication and marketing, administration and finance, and information technology.

c) For volunteers, who provide additional resource to the organisation, they may come from the members themselves as well as from non-members who are experts in their own rights. Finding them and fitting them in well will help the organisation.

d) Members are the lifeblood of the association so member engagement is essential to keep them up-to-date, excited, and recognised.

Technology refers to IT and digitisation which play a significant role in member benefit delivery and operational efficiency in today's new normal. Two considerations:

e) In-house or outsourced capability: In-house digitisation could be limited to member data-basing, and accounting software while outsourcing can be for website/hosting, data analytics, digital publication.

f) Associations could also leverage their networks by working with their members in accessing technologies that may be useful for them.

Finance covers the association's needs to generate revenue and produce surplus to pay for member service delivery and related costs as well as overhead. Prudent financial management and investment is key to its survival and sustainability. An annual surplus of at least 10 per cent could be targeted to build up a reserve fund for the 'rainy day.'

Putting all the elements of "ReVS" together needs both logic and creativity. I hope this pathway may be useful for your association to plan ahead and grow.

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Five Ideas
Association Decision-Makers Must Discard in 2023

With the start of 2023 now just weeks away, association decision-makers would be wise to pause and reflect on which ideas will advance the ongoing effort to move their organisations forward, not only over the next 12 months but for the rest of this decade and beyond. To facilitate their inquiry process, this article examines why five popular ideas are, in truth, quite detrimental to the future of all associations and must be discarded immediately.

Future-proof. Given the complex and difficult challenges association decision-makers have faced in the last 2+ years, it is easy to understand why this idea has gained traction in our community. But as I wrote more than two years ago, "[w]hile clearly appealing from a marketing perspective, the implication of this catchphrase is that associations can be made somehow impervious to the impact of future forces." This is an unattainable outcome. Instead, association decision-makers must work to anticipate a full range of plausible futures through a consistent and robust practice of foresight and use their intentional learning to shape different and better futures for their organisations, stakeholders, and successors.

Generational labels. We know that generational labels are meaningless. Nevertheless, even as we put pressure on young people to step up and save the world from their predecessors' mistakes, our community also demeans them by implication through the continued use of harmful shorthand descriptors. As I argued in 2019, "...associations should not participate in any way in the ongoing denigration of the very stakeholders they want to attract to their organisations," a warning that still goes mostly unheeded. To thrive in the years ahead, associations must stop applying unsupportable generalisations to categorise young people and start building an empathic understanding of who they are as actual human beings.

Relevance. In recent years, the notion that ensuring relevance is the strategic endgame for associations may have finally overtaken membership as the community's most sacrosanct orthodox belief. Relevance is a fallacy, however, one on which I have been pushing back for many years. As I wrote in the fall of 2020, "continuing to perpetuate the relevance fallacy is a serious mistake because it creates a clear pathway back to complacency," which is precisely what has happened over the last two years. For associations to thrive in the years ahead, they must strive to make an ethical and purposeful impact on our world rather than wasting organisational attention and energy on a futile run toward relevance.

Soft skills. The shift to more remote work, the intensifying power struggle between employers and workers about returning to the office, and the accelerating adoption of artificial intelligence/automation technologies combine to raise serious questions about the long-term future of human contribution to work. For association stakeholders and successors, navigating this disrupted context in the years ahead will require them to develop more robust capabilities for coordination, cooperation, and collaboration, and become better at communications, creativity, and imagination. While each of these skills is profoundly human, none are "soft," and association decision-makers are long overdue to stop describing them in this way.

Strategic planning. My contrarian view on the association community's enduring commitment to strategic planning is straightforward: strategic planning is not a good use of association resources. This was true before the pandemic, and strategy as an exercise in planning will not help association decision-makers navigate the discontinuous next they will need to contend with for the foreseeable future. What associations need is strategy as a process of learning, which concentrates on the purpose-driven and empathic co-creation of distinctive value with stakeholders as a complement to the practice of foresight that must be the primary focus of association boards.

The beginning of a new year is always an important moment for association decision-makers to think differently about what it will take to build their organisations to thrive. As the fourth year of The Turbulent Twenties begins, the urgency for new thinking and action continues to grow. Choosing to let go of these five outmoded and damaging ideas is a necessary first step in the right direction.

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Making Membership Essential During Challenging Times &
Not Fiddling Whilst Rome Burns

It's safe to say we've all had a tough couple of years due to the COVID-19 pandemic. However, membership organisations and associations across the globe have remained resilient and most are now back on track. We're out of the woods, right?

Well, over the next 18 months members' attention will firmly shift from the realities of the pandemic to their personal, family lives, business finances and spend.

At the time of writing this article global inflation had risen from slightly above 0 per cent to 10 per cent in just a year, 60 countries simultaneously raised interest rates (a number not seen for over two decades), businesses that had taken out government-backed loans were being asked to start paying them back (despite being in financial distress) and the global stock market indices was down by 21 per cent. Energy prices in the UK/EU are expected to skyrocket.

All of these indicators point towards a pending global recession that will almost certainly hit over the coming year. From a membership perspective we need to be ready for it.

Global Inflation Tracker

(source: FT Global Inflation Tracker).

Membership is currently considered as optional or dare I say a 'nice to have'.

Music streaming subscription companies have been the first to see decreases in subscribers/ members, as consumers 'tighten their belts' and view these memberships as 'disposable'. In the first quarter 1 million subscriptions had been cancelled and growth for the rest of the year was predicted at just 1 per cent. Take a look at Apple Music's new member value proposition (MVP).

With zero commitment, subscribers will be whole heartedly looking and feeling like their subscription is 100 per cent transactional (source: Kantar Research, 2022). During challenging times, loyalty (at least as far as these subscription services are concerned) will be rock-bottom. We don't want that for membership!

So, what can membership organisations do to circumnavigate what will be quite a tough time?

Organisations have a number of tools at their disposal, however because of the responsive and risk-averse nature of many organisations there is a danger of 'Fiddling Whilst Rome Burns'.

Cutting short term budgets, fast-forwarding to member engagement only campaigns, automating processes and/or moving benefits online will only go so far in the short term.

Our best chance of medium to long term success (in my view) will be to go back to basics and consider relevance, current perceived and actual member value delivered, deepen member loyalty and create robust (yet flexible) future member engagement strategies, plans and effective delivery.

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Making Membership Essential During Challenging Times & **Not Fiddling Whilst Rome Burns**

The two key questions every membership and association professional (and indeed every member) should be able to answer (and articulate online and offline) in under 30 seconds:

1. Why would a prospective member join?

2. Why would an existing member renew?

It is incredible to report that in 2022 only 59 per cent of UK membership organisations have a formalised and clearly articulated Member Value Proposition (MVP). (Source: Digital Excellence 2022 Research Report by the MemberWise Network).

In terms of strategy the UK association and membership sector is also behind the curve. Roughly two-thirds of UK medium/large organisations have no digital strategy and/or member engagement strategy in place.

We need to put this right as we have all heard the well coined phrase "Fail to Plan. Plan to Fail".

Don't let this be your organisation.

A focus for our network over the coming months will be to make membership 'essential' in the minds of members, so that ahead of annual renewals (during challenging times) there is less price sensitivity, higher loyalty and ideally increased advocacy. Whilst recognising some members are happy to be passive we encourage membership organisations and associations to adopt a 360 degree/365 days approach to member engagement to optimise satisfaction/loyalty.

A key recommendation we also have is that you should not assume your members know about the benefits of membership. To coin a phrase from CEO of the Institute of Physics (IOP), Tom Grinyer, "We think members think about membership more than they actually do." So more concise communication of relevant benefits (to key member segments) of membership is needed. Long lists/brochures/PDFs of generic member benefits will no longer cut it.

If membership is seen as optional, organisations need to focus on the key benefits of membership that are valued by members and ensure perfect knowledge and optimised use is achieved. At the same time benefits that are not valued should be discontinued.

Membership needs to be viewed as essential in the minds of your members and by considering your value proposition and the desired mindset of key (current and prospective) member segments we can more appropriately invest in member engagement strategy, planning and delivery.

MemberWise Network Resource Signposting:

- MemberWise Connect
  (Online Professional Community)

- MemberWise Learn
  (Online Learning Portal)

- MemberWise Network Website
  (feat. Free best practice guides/resources/blog)

Should I Sunset my Program?

Are you debating if you should sunset an entire program, or possibly a component of a program?

An exercise that I love to do with organisations is what I call the High-Low exercise.

Bonus tip: you can do this exercise with any product your association offers.

1. Begin by listing out all of the features in your product by bullets with your team. As an example, here is a membership list we created with a past client:

- weekly curated content from trusted sources
- weekly email bulletin with our latest content
- 12 monthly newsletters
- 4 quarterly journals
- discounts on offerings (events, certification, etc.)
- database with thousands of historical articles
- webinars, podcasts, blogs, and whitepapers
- private member-only linkedin group for networking
- career centre
- mentor opportunities
- annual research on salaries, career opportunities, and what's next for the field
- diversity, equity, and inclusion content every year specific to our field

2. Go one bullet at a time and ask yourselves as a team if this is of high value or low value to your members. If you aren't sure, send a quick survey to find out. We recommend asking for:

- Name
- Email
- Membership type (if categories)
- Demographic questions (if you want to segment responses)
- List all of the bullets and ask for their top three as a required question, then ask an optional why for those who choose to give qualitative feedback.
- List all of the bullets again (with flow to remove their prior three if your software permits this) and ask for their bottom three as a required question, then ask an optional why for those who choose to give qualitative feedback. (Note – if you have 10+ bullets, ask for top three and bottom three; if you have five to nine bullets, ask for top two and bottom two).

Plot each bullet on a scale of 1-5 with 1 being low value and 5 being high value. Something such as a weekly newsletter with the latest content might feel like high value because it's something that many members will click on, but at the end of the day that's not necessarily a value lever that will make someone join your association.

More than likely, high value items will be things like continuing education, networking, and access to authoritative content for the industry that they can't find from generic sources on Google.

Should I **Sunset My Program?**

3. Go back through that same list, but this time you're going to ask if it is high effort or low effort for our organisation to put on.

This is relative, so it will vary by organisation, but high effort tends to mean something that takes up a lot of staff time or resources, even if you've budgeted for it. Low effort typically equates to something automated or running on autopilot with an outside vendor. It doesn't take much effort or many resources. Once again, rate each bullet on a new scale of 1-5 with 1 being low effort and 5 being high effort for your organisation.

4. Finally, when you're done with this you'll be able to map everything that's in membership into one of four quadrants based on a value axis and an effort axis, as below:

- **High Value, Low Effort:** This is your golden arena. You want as much as possible to be high value, but also automated so that it's low effort for your organisation. This is where you should consider how you might scale up to optimise your program.

- **High Value, High Effort:** These make a strong difference in acquiring new members/sponsors/attendees and retaining your current audience, but it also takes a lot of effort from your organisation. Therefore, it takes resources including time and money, which goes back to why financial sustainability matters. These are most likely the items that help decommoditize your organisation from competitors – this is your premium offering/tier that you charge for.

- **Low Value, Low Effort:** These components are nice to have. It doesn't take much time or effort so it's okay to keep in, but it's not driving sales. Newsletters tend to fall here – these are things you won't sunset, but you won't allow to become high effort for your team.

- **Low Value, High Effort:** This is your danger zone. These are things that take up a lot of staff time or resources and don't have a great return on investment. That doesn't necessarily mean that you need to sunset these bottom tier items, but it might mean that these are the things that you scale back, or have a tough conversation regarding KPIs to confirm continuation or sunsetting. If they don't decrease in effort (possibly through automation) or increase in value, it will be time to sunset.

By walking through this High-Low exercise, your team can quickly determine what should be considered for sunsetting as well as where you should scale up and continue to differentiate your offer in your competitive landscape.

Based on which quadrant each component or program falls into, you can make data-informed decisions:

HIGH
VALUE

LOW
EFFORT

HIGH
EFFORT

LOW
VALUE
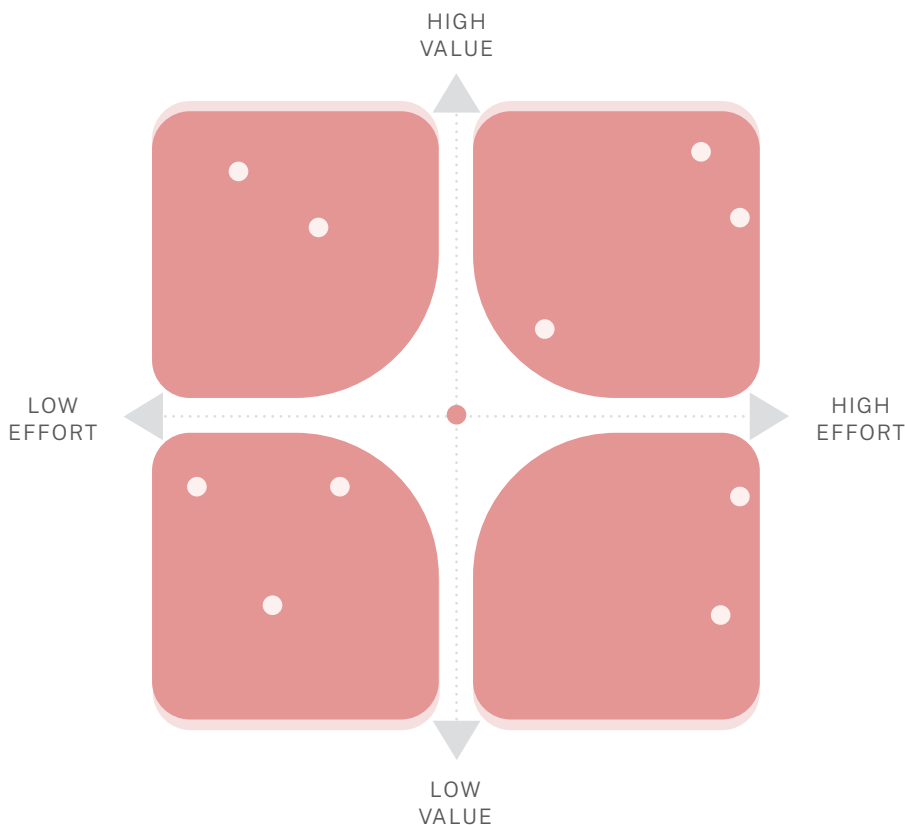
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How Advocacy
Can Be a Key Driver of Member Value

Association advocacy has never been more important or more urgent. During the height of the pandemic, the individual and collective advocacy efforts of associations around the world saved countless lives and drove economic relief and recovery for many professions and industries alike. This, in turn, heightened the interest around advocacy among many association members, in some cases for the first time.

As a result, associations have a unique opportunity to build upon this elevated awareness and enthusiasm to firmly establish advocacy as a key driver of member value going forward.

But how?

To be sure, advocacy is nothing new for the association community. Long before COVID-19, associations worked to advance their members' interests and drive positive societal impact with agencies, ministries, parliamentary bodies, and multilateral institutions across the globe. But how many of those associations consciously connected those efforts back to member recruitment, engagement, and retention? Sadly, far fewer.

Why, you ask?

It was once famously observed that, "To many, government is like the weather – an inescapable, often unpleasant fact of life best left to its own mysterious devices." To many association executives, so too are the complexities and nuances of their own advocacy programs.

Perhaps so, but like that trusted weather app on your phone, help successfully navigating the 'inescapable' can be extremely valuable. And finding a way to explain, circumvent, and potentially overcome the 'mysterious'? Priceless! Well, that's exactly what associations delivered for their members during the pandemic through their advocacy efforts, and that work carries on today from Washington, DC and Brussels to Geneva, Canberra, and beyond.

Too many associations, however, have fallen short over time in communicating those advocacy endeavours and hard-won victories back to their members in a way that reinforces the value they provide. This is a missed opportunity, because not only is advocacy one of the top reasons given for joining associations, but advocacy is among the most important topics for members to receive information on once they have already joined.

Rather than segment member-value and advocacy messaging, the key is to communicate about advocacy in an integrated way that shows how advocacy is a critical piece to the relevance and engagement puzzle. This requires leveraging marketing best practices around cadence, consistency, and preferences so that advocacy messages and other communications reinforce each other without contradiction or overwhelming the recipient.

Done well, this can accelerate the "me" to "we" membership journey. While members often join associations to receive tangible benefits such as event registration discounts and access to specialised information, such rational benefits are eventually exhausted. The demonstration of collective action on behalf of a member, however, taps into more emotional components that can deepen association affinity beyond benefits, products, discounts, and services.

What does this mean for membership growth and retention? Whether it's selecting a new phone or deciding whether to join or renew an association membership, the foundational means-ends model of consumer judgement shows that the perceptions, expectations, and beliefs that drive decision-making have both rational and emotional components. Rational components can be replicated or replaced by competitors or substitutes, but not emotional ones.

That's why association advocacy — successfully executed and properly communicated — can shift the join or renew decision from a rational analysis of specific benefits and their perceived functional utility to an emotional one that taps into personal values in a way that heightens relevance and drives future engagement.

While the pandemic showed that many association offerings can be quickly disrupted, nothing can disrupt the emotional power of a membership that believes, "My association is fighting for me!" That's why advocacy must be a key driver of member value for associations into the future.

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Aligning Membership Models to Purpose

What is a membership model review? First, it's not a membership category review.

Why? A membership category review determines if there is a better way to structure your membership category options to refine how you offer value to different member segments. The underlying business model remains unchanged – you are simply looking for a better way to do "business as usual".

A membership model review is more complex.

It accepts that associations do not exist to recruit members and that membership is just one of the many tools to help advance purpose. It takes a deep look into the foundations of the association to ensure that "tool" is correctly aligned with your purpose. It's about looking for a better way to do business.

Your membership model should be the result of informed decisions across the six components of a membership model. Sadly, most association membership models are the result of the haphazard historical evolution of the association. The lack of alignment means that, for many associations, their membership model inhibits them carrying out their true purpose.

It is not the cure-all for poor membership performance.

It is common for associations to undertake a membership model review when experiencing membership issues. While an unaligned membership model can inhibit membership success, there may be other factors at play. Is it common for a membership model review to identify other factors inhibiting performance.

Elements of a membership model review

Your membership model is a combination of the choices – and interrelationships – between:

Your purpose. Contrary to popular belief the role of associations is not to recruit and retain members. The advancement of that cause is the purpose of associations. A clear and compelling purpose provides a solid foundation for all association activities to flow. It is a lens through which decisions can be evaluated, a tool against which success can be measured, and a constant "north star" in a rapidly changing world.

Who you serve. While there are a lot of people who "could" be a member, not everyone "should" be a member of your association. All individuals and businesses who engage with your organisation will fall into one of five groups below. A membership structure is rarely appropriate for those falling into the Customer and Campaign categories. And only appropriate in the Engage category if certain conditions are met.

- Serve – Those you exist to serve.
- Engage – Those you engage to advance your purpose.
- Customers – Those who transactionally purchase our products and services.
- Campaign – Those we only engage with to run campaigns from time to time.
- Vendors – Those who provide products or services to our community.

How you serve. It is common to see associations wasting resources on activities unaligned with the current purpose because "we've always done them". For an association to fulfil its purpose, the choice of activities must be carefully considered, and focus placed on where the most impact can be achieved. The impact of functional choice has a huge impact on all aspects of the association. Each of these functions have characteristics that impact your membership model. The more functions you choose to employ, the more challenging it becomes to structure an effective membership model and deliver compelling value. The five choices are:

- Representation. To represent the interests or exert influence on behalf of a group to a specific stakeholder/s (E.g., government and/or the public).

- Mobilisation. To mobilise people or organisations to take collective or independent action to achieve an objective.

- Service Provision. To provide products, services, events, and/or communications to assist them to achieve their objectives.

- Participation. To create pathways for individuals or organisations to pursue participation pathways to excellence. These pathways are built from initial trial to elite performance. This is often found in sports or professional training pathways.

- Community. To foster networking and build a community that enables participants to connect directly and find solutions to their challenges. This can be online, offline, or both.

How you engage. How you engage with your market to deliver your functions is a major determinant of your membership model. Broadly speaking, associations can deliver each function in one of three ways:

- Traditional. Where the association delivers functions via traditional channels, such as direct mail, email, and face-to-face (most older people grew up with this model).

- Modern. Where the association uses technology, automation, and new media – as well as relevant traditional media – to deliver functions.

- Online. Where the association uses an integrated online technology platform to deliver its functions with strong data-driven automation creating a seamless user interface.

The other factor is your capability to deliver each function. Within each of the ways, an association's performance sits on a spectrum of capability ranging from Developing to Intermediate to Advanced.

As part of the process of identifying the right model for your organisation it is important to understand:

- Your current state. How do we currently deliver each function (E.g. Modern Developing)?

- Your ideal state. How could we better deliver each function (E.g. Modern Advanced)?

- The gap. How could we best bridge the gap between our current state and ideal state?

The greater the gap, the more change required. For example, an association who is Traditional Advance would require significant transformation to shift to an Online Advanced position. It would require significant changes in technology, workforce capability, and culture – just to name a few.

Aligning Membership Models
to Purpose

Your identity. Your identity confers certain expectations and boundaries around the membership model development process. Factors contributing to your identity include:

- Sector positioning. Whether you are a Primary or Secondary Association within your sector has a significant impact on your model. A Primary Association is the dominant body – for example, a surgeon is likely to be a Fellow of the Royal Australasian College of Surgeons. A Secondary Association is one that people join in addition to their primary membership. For example, a surgeon may also be a member of the Australian Medical Association. Associations whose members come from a range of disciplines, specialities or industries are more likely to be Secondary Associations.

- Type of organisation. Certain types of organisations have specific expectations around the nature of their offering. For example, medical colleges are understood to provide training pathways for individuals in their profession.

- Structure of your organisation. The structure of your organisation can create limitations on your membership model. For example, an association within a Federated structure may need to incorporate capitation fees within its pricing models.

How it is funded. There are many ways of funding a membership program. To identify your options, you must understand your current performance, including:

- Your membership fees as a percentage of total revenue.

- Your membership fee revenue and numbers (in total and by market segment).

- The cost of recruiting and retaining members (what costs would disappear if you didn't have members?).

- The challenges, issues and opportunities with your current membership fee structure.

From there you can:

- Set your membership goals.

- Determine the type of fee model you will use for each segment (E.g. annual fee, subscription, no fee).

- Identify the fee offset revenue streams, particularly if choosing no or minimal fees.

- Clarify the detail within each other. For example, pricing preferences (flat, tiered, none), membership categories, payment options and renewal period.

Transitional considerations. With a sound idea for what your membership model will look like, it is also important to review transitional considerations such as the operational impact on your organisation in areas including governance, component frameworks (E.g. committees and branches), volunteering pathways, your product and services offering, workforce, technology, and communications.

This is a very brief overview key factors to consider when reviewing your membership model. Perhaps the biggest takeaway from this process is the understanding that membership models within every association are always evolving. Failure to adapt and meet the changing operating landscape can increase the gap between your "current state" and "ideal state" – so significantly that complex and high-risk change is required. You can avoid this by regularly checking to ensure your model is aligned to your purpose and supporting the success of your association.

Belinda Moore has devoted more than 30 years to understanding the characteristics of high-performing associations – and sharing those insights so other associations can emulate that success. As a speaker and facilitator, she is known for her enthusiastic and engaging style. In her sessions she reveals insights from her experiences and research to ensure people walk away with practical ideas and insights they can immediately apply. Much of her current consultancy work focused on strategic planning and membership model reviews for associations. Belinda has written four books: The Membership Machine, Membership Fundamentals, Membership Managers' Handbook, and Association Annie: Herding Cats. She authored the white papers Associations Evolve (2021), Association Apocalypse (2019), Rise! (2020), Membership is Dead? (2014), and COVID & Beyond (2020). She is the editor of the annual Associations Evolve journal.

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Identifying and Solving
Systemic Membership Marketing Challenges

"Why isn't my membership growing?" We hear this question often in meetings with association executives. As we investigate, a consistent theme emerges. In most instances, a systemic impediment is holding back membership efforts.

These systemic challenges are not always obvious. However, based on real-world experience and 14 years of data collected from thousands of associations through the annual, industry-wide Membership Marketing Benchmarking Report, several common obstacles have been identified that constrain membership growth. Identifying one or more of these roadblocks for your organisation and fixing them serves as a powerful lever for growth. Here are the five common membership marketing impediments.

Undefined value proposition

Presenting a clear value proposition is foundational to membership marketing. Sadly, in the most recent benchmarking research, only 10 per cent of associations say they offer a very compelling value proposition. The real issue for many groups may not be that they do not offer attractive benefits but that they have a lack of understanding of the value they deliver. Members do not write a check to renew if they do not see the return on investment. Yet, in the same report, the median renewal rate for associations is 84 per cent. This apparent contradiction indicates that many associations may not fully recognise the value that they are providing. Taking the time to interact with members and conducting research allows an association to clearly define its value proposition and learn how to message that value to prospects and members.

In attention to membership recruitment

The ongoing responsibilities of serving members and urgent activities can block out the essential job of adding new members to the top of the funnel. However, not consistently asking prospective members to join represents one of the top hindrances to growth. Years of benchmarking data affirm a strong correlation between increased new member input and overall membership growth. Renewing current members is essential, but renewal rates are hard to change and have remained remarkably consistent for years. You cannot renew your way to growth. However, adding more new members by prioritising staffing and budgets devoted to recruitment will often ignite gains for an association.

Overreliance on a single channel

Many associations that focus on membership marketing find results diminishing by relying on a single tactic to add and retain members. Pandemic-caused cancellations hurt groups that relied on an annual meeting to attract members. Others dependent on email have seen drops in open and click rates through overuse. The solution to ensuring your message gets through is developing a portfolio of communication channels using an omnichannel strategy. This approach uses many methods like mail, phone, social media, paid digital ads, and sales efforts to meet prospects and members where they are most likely to interact. There is no single stand-alone marketing channel that can fully support membership marketing.

Underfunding membership efforts

Acquiring new members is one of an association's most expensive marketing initiatives. But compared to any other associated product or service, membership generates a predictable ongoing revenue stream. An organisation with an 80 per cent renewal rate will keep members on average for five years. Plus, members tend to be the best non-dues customers for an association. So, for example, an organisation with dues of $150 and non-dues revenue of $50 will see a lifetime value from a new member of $1,000 on average. This return warrants a substantial investment. Benchmarking data supports the impact of increasing membership marketing budgets. Over the past year, there was a correlation with better results for those groups who boosted their membership marketing spending. Conversely, those reporting declines in membership counts tend to have decreased their budgets.

Lack of innovation

Focusing on organisational innovation is another vital driver of membership growth. While only 29 per cent of associations consider themselves extremely or very innovative, these groups are significantly more likely to see increased membership counts. At the macro level, innovation may require reevaluating your membership package. Is deploying a tiered membership structure or offering a hybrid membership where either an individual or an organisation can join in your future? At the micro level, one of the most significant opportunities to innovate is through market testing, tracking results, and analysing the returns of your marketing campaigns. Building a testing orientation into marketing efforts allows you to continually adapt as your audiences tell you what they want through their responses. Meaningful elements to test can include who you target in your promotions, what special offers you make, how you present your messages, and what combination of channels works best.

Increasing an association's membership remains an achievable goal. Year after year, benchmarking research highlights that many more associations see their membership counts going up than those experiencing a decline. The opportunity for growth often comes down to focusing on high-leverage strategies with a proven track record of success. Take advantage of these growth drivers to build a thriving membership program.

Tony Rossell ■

Tony Rossell serves as the senior vice president of Marketing General Incorporated (MGI), a direct marketing agency in Virginia, USA. He has consulted with hundreds of associations for over three decades to help them achieve their membership growth goals and mission through better strategy, research, and marketing. A frequent writer and speaker, his recently published book, Membership Recruitment: How to Grow Recurring Revenue, Reach New Markets, and Advance Your Mission, offers a practical guide to help membership professionals. He is a contributing author to two other books, Membership Marketing (ASAE 2000) and Membership Essentials (Wiley 2016). He is a regular speaker at association conferences and has presented membership marketing topics on four continents. He is the past chair of the ASAE Membership Professionals Advisory Council.

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The True Meaning and Benefits of
Member-Centricity

Is your association member-centric? Perhaps you're immediately thinking, "Certainly!", but is member-centricity really as simple as it sounds?

Member-centricity is the ability to anticipate members' different needs, expectations, and communication preferences; and then deliver your personalised service to meet these anticipations. This can be achieved with the right set of technology as well as the ability to read and interpret the volume and variety of member data it provides.

With more and more brands offering highly customised products and services with exceptional delivery, customer-centricity has become the new norm as customers only want to spend their time and money on organisations that deliver personalised and relevant experiences.

Try to remember using a service of one of the brands with a customer-centric culture. Whether it's Spotify, Netflix, Amazon, Sephora, or McDonald's, once you buy a product, it's like by the wave of a magic wand you're offered another one that you just wanted (or maybe didn't even know you wanted, but you're already buying it!).

As providing content is at the core of membership organisations, the role of associations isn't just to create more content and events, but to be able to curate this content, create a journey for members, and offer what is the most relevant and useful at this particular point of time (whether it's their career, business need or personal experience). Be a Netflix of your industry.

If the ultimate goal for your association is to create a culture of member-centricity, following the steps below may help you get there.

1. Start with the culture

Customer-centricity begins with your association's culture. If you want to be member-centric, then your association needs to make a company-wide commitment to your members' success.

Every department, not only the membership team and other front-line employees, needs to create services and experiences with members in mind. Starting from an organisation's top leaders, every role needs to operate under the assumption that they have the potential to impact the overall member experience.

2. Embrace the power of technology

To succeed in the era of customer-centricity, associations must undergo a continual digital transformation to create an exceptional digital experience for their members and team.

New digital tools are constantly emerging to meet the needs of modern businesses. These tools work together to address every stage of the membership cycle: attracting, converting, engaging, managing, and understanding your members. They also make collaboration across teams simple and intuitive. When implemented well, a good technology stack creates an agile and data-driven company that can best meet members' needs.

The good news is that with growing competition these tools are becoming more and more affordable, and even small businesses can embrace the power of data and technology.

3. Encourage data-driven decision making

There has never been more customer data available than there is today, and associations are in the unique position of being able to directly communicate with their customers and members as well as gather the most accurate and detailed information.

However, ironically, the volume and variety of data flooding into organisations is often the main reason why customer focus is so hard. The challenge is the ability to read and interpret this data, and to use it in a meaningful way.

One of the main recipes of success for member-centricity is centralised access to customer data and insights, whether it's an all-in-one membership administration system, Customer Relationship Management system, or any other tool that merges customer data from different sources that you may use.

4. Focus on personalisation

Personalisation is at the heart of customer-centricity. And this doesn't just mean including your members' names at the start of an email.

With the highly cluttered inboxes and customisable social media feeds, your members expect to receive content relevant to their location, career stage, industry, and interests. They want to see content addressing their problems, not the list of services and events you're offering. They want to login to your member portal and see the information that's relevant to them.

Start personalisation by segmenting your data and creating member personas based not only on their geographic location or industries, but based on their needs, challenges, and common values. Narrow and sharpen your focus on your key segments and make sure you understand them well. Then use your data and insights to offer personalised, targeted offerings.

Member-centricity starts by focusing on member needs and how they want to interact with your association – not your events, programs, or tiers of membership. By designing your programs and services from the member perspective, nurturing your team culture, analysing your members' journeys, and removing obstacles along it, your association will provide meaningful member experiences as well as build long-lasting relationships with your members.

Olena Lima ■

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Organisational Membership:
The Future for Association Growth

"Group" membership is not a growth strategy.

Many associations have "group" membership, which usually amounts to a modest volume discount, sometimes with a single invoice. Unfortunately, these group membership plans do not do very well and are mostly an afterthought in the membership strategy.

The problem is that companies don't want to pay for any employee's membership. Or at least far fewer companies do. Most organisations stopped paying employees' membership dues when times got tough and never started again.

Organisational membership is the new path to growth

Organisational membership is an entirely different value proposition. It is a B2B offering designed with the executive decision-maker in mind. The real magic in the offering is a distinct set of benefits that speak to the needs of the executives who make the decision.

What kinds of things? They must be things that have demonstrable financial value and elevate the decision-maker's profile. They could include:

- positive public relations in publications highlighting the great things their organisation is doing

- access to advocacy and policy leaders to be in the know and have their voices heard

- a seat at the table on an Executive Advisory Council with the CEO

- help in recruiting employees with exclusive data and priority promotional opportunities

- substantial savings on education and events they have to pay for (e.g. continuing education, training events).

These are things that only the association can provide, that have real bottom-line value to a corporation at a minimal cost to the association to deliver. This kind of offer works because it has clear value and is easy to justify financially.

Organisational value is worth far more than dues

Associations think about dues first, which is wrong for organisations. Why? The value to the organisation is not a matter of how many employees they sign up for membership; it is the tangible financial impact they will receive. How much is $1 million in savings worth to an organisation?

Corporations expect to pay for things this way — the greater the value, the more things cost. In organisational membership, larger companies generally get more value than smaller ones and thus pay more. A large organisation might pay $100K for that $1 million in value. A smaller one might get less and so pay less.

An explosive growth opportunity

A prominent medical society that Sequence worked with launched an organisational membership for large health systems that employ physicians. They offer a suite of benefits, including inside access, publicity, burnout prevention, early access to residents for recruiting, and free continuing education. In addition, all of the physicians in the system are eligible for an individual membership at no cost.

The cost is value-based, ranging from a flat fee of $15k for smaller systems to $100K for large ones. Health systems sign up for the tangible financial value they receive.

It is an overwhelming success. In the first year, 5,000 new physicians came in through enterprise membership, so many they had to pause

the program because they could not onboard them fast enough. The association projects that more than half of its new members will join through organisational membership in a few years.

The key? Sell it the right way

What were the keys to success? First, an incredibly attractive set of benefits based on thorough research. Second, a convincing financial case. Finally, and most importantly, sales.

Organisational membership is a B2B sale. It takes time and skill to reach and persuade the right buyers. In this case, it meant a dedicated sales resource with the high-quality sales approach executive buyers expect.

Other Sequence clients have had equivalent success with organisational membership programs custom-tailored for their markets. For example, the Executive's Club of Chicago doubled its membership in three years after rolling out a new Enterprise Member value proposition.

Minimise the risk

One concern is how much it might "cannibalise" individual membership. The risk is that organisational membership might ultimately decrease net revenue by offering discounted memberships to individuals who would have paid full price.

It is a valid question that one can answer with good data analysis. Unless market penetration is exceptionally high, the revenue gains will outweigh the discounts in most cases.

There is also a risk that big groups that join at once might leave at once, creating excessive volatility in membership. One can mitigate this with thoughtful multi-year contracts, extended notice provisions, and other safeguards.

The future of association growth

For many associations, individual membership has reached a plateau. Growth is meagre, despite their best efforts, and it is unrealistic to expect big jumps in growth from doing the same old things. A new model is needed.

Organisational membership allows associations to enter a new market where they have an immediate competitive advantage – and to do so at a very low cost. The revenue and membership growth opportunities are significant. Too significant not to seriously explore.

Chris Vaughan ■

Chris left his career as a Big Strategy partner in 2001 to launch Sequence Consulting, exclusively focused on association growth. His mission is to help associations grow membership and revenue. Chris works with the most successful associations worldwide, including AARP, American Medical Association, IEEE, American Psychological Association, SAE International, and many others.

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The Role of Subscription Pricing
in Association Membership

Subscription is a pricing tactic.

It is not a strategy.

It's important to remember this distinction when you're designing subscription-based membership offerings for your association.

Many associations are attracted to subscriptions for the same reasons as corporations:

- Predictable cash flow allows for more thoughtful and confident investing in the future.

- Members who subscribe often establish habits, and engage more deeply in the association.

- Subscribing can increase loyalty and satisfaction, and result in referrals.

I have seen the transformative power of subscription pricing in building "forever transactions" between organisations and the people they serve. I have spent most of my career studying subscription pricing, membership models and the power of focusing on long-term relationships.

But if you want your subscription offerings to be successful, and to result in greater engagement, loyalty and lifetime member value, you have to think holistically.

STEP 1:
Define your ideal member and forever promise

Step 1 is to take a step back and ask yourself a few questions. Who is your ideal member? What is the ongoing goal this member is trying to achieve, or ongoing challenge they're trying to solve?

In many associations, the "ideal member" wants to thrive personally and to support the integrity of the profession as a whole. So the ongoing goal (or what I call "forever promise") is "help me thrive in my profession, and ensure the integrity of this profession for the future."

STEP 2:
Determine all of the ways you can help members achieve that goal

Step 2 is about your product offering. Now that you have a clear idea of your ideal member and their desired outcome, you can consider what your organisation can do to help them.

Let's take "thrive professionally and support the integrity of the industry as a whole" as the forever promise.

You might start at the beginning of that person's career, maybe while they're in school. What can you do to help them early on? Maybe offer discounts on conferences, mentorship, and help with student loans.

Later in their career, their needs evolve — they are trying to stay current in changes in the field and build a network of colleagues and peers. So the right benefits here might be briefings, access to experts, and small group events to build connection.

And as this person reaches their peak professional status, they may value recognition for their contributions to the profession, as well as the ability to mentor others. They may also be looking for help as they plan for retirement and who will succeed them and take over their business.

By building your product offering, against the member journey, you can provide ongoing value, build engagement and drive loyalty. Ideally, it will seem to your members as if you can "see around corners" for them, helping them anticipate the next challenge before they've even considered it.

STEP 3:
Structure and price your offerings

Only once you have the offerings and the member journey mapped out can you begin to think about the value of what you can offer, and who among your ideal members would want it. There's quite a bit of iteration that goes on here. You may find that your offer is more or less valuable to different segments (new versus experienced professionals, for example, or people who attend your conference versus people who don't).

Triangulate pricing, considering what your member is willing to pay, what the offering will cost you to deliver, and what alternatives the member has to achieve that forever promise.

It can be tempting to offer many subscriptions along with "add ons" for conferences, databases, and other elements.

Keep in mind that the more complex your pricing, the harder it is for the member to establish habits and just trust that you're going to help them achieve their goals, in exchange for fair payment.

STEP 4 (Step Forever):
Test test test

Even with a clear ideal member, forever promise and offering, you need to test and see how your audience responds. Do they understand what you're offering? Is it relevant to them at that price? Once they sign up, how do they engage and what distinguishes the subscribers who stay from the ones who leave?

You will have many questions to test early on, before scaling your launch. But even after the full launch, you'll want to continue iterating, learning from the data you're getting back, and improving the offering.

The biggest mistake I see with organisations of all types that launch subscriptions as just one of many business models, is that they think that the launch is the finish line. And really, it's just the starting line.

Robbie Kellman Baxter ■

Robbie Kellman Baxter is a consultant, instructor, author and speaker. She wrote two bestselling books The Membership Economy and The Forever Transaction, hosts the podcast Subscription Stories, and has developed 10 courses for LinkedIn Learning. Robbie has more than 20 years' experience providing strategic business advice to major organisations, including Netflix, Microsoft and the Wall Street Journal as well as dozens of professional societies and associations. She has been focused on subscription and membership models for the past twenty years, and has degrees from Stanford and Harvard.

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Is there a Future for Association Chapters?

While we all felt the rumblings in chapters before 2020, the pandemic has us jumping over deepening cracks in the system. We saw too many chapters go dormant even as we saw others burst with activity and new faces. Disruption opened a door for us to explore new options for chapters and chapter programs.

Two major studies captured much of this experience in data. Findings from ASAE Foresight Works: A World Reshaped by COVID uncovered several common themes characterising the chapter response to COVID-19.

20th century form limited 21st century function. An antiquated organisational structure limits chapters' ability to adapt to a virtual environment. While some pivoted successfully, many lacked the flexible and innovative mindset, resources, and/or technology to shift quickly to the virtual format.

Time zones, rather than geography, redefined operational boundaries. The shift to a virtual environment produced several interesting side effects. Many chapter members who had never participated in traditional in-person events showed up for virtual programs — suggesting an opportunity for responsive chapters to expand their value proposition beyond those members willing to get in a car. Yet, paradoxically, this shift also placed chapters in direct competition with programs delivered by the central organisation (association headquarters/HQ) and other chapters.

Good leadership still matters. Chapters that adapted well to the pandemic benefited from good leadership — flexible, innovative, empathetic, business-savvy, problem-solving leaders. This fundamental attribute of effective organisations is especially important in an environment of uncertainty and radical change — and it applies regardless of technology.

The Mariner Management/Billhighway 2022 Chapter Benchmarking Report filled in with data from association CEOs, CRPs (Component Relations Professionals) and chapter leaders. The full report, available for download (free), highlights three critical deserts that if addressed can truly help associations answer, "are chapters worth the effort?" And if they are, how to apply the right services and support to create what appears to be an elusive value.

To understand the three deserts, we asked associations: are chapters worth the effort?

This question continues to stump the association community. Only 30 per cent of CEOs offered an unqualified "absolutely" when asked if chapters are worth the effort and organisational resources devoted to them.

The answers of the remaining 70 per cent ranged from "probably" to "absolutely not" with an average score of 2.8 on a 5-point scale earning a C- at best. CRPs gave an only slightly better score of 2.9 for overall effectiveness.

Based on the CEO and CRP surveys, roundtables, and focus groups, the uncertainty derives from fuzzy metrics caused by the persistent lack of valid chapter performance data. Only 22 per cent of associations surveyed reported having direct access to a full range of chapter data while 39 per cent reported no access at all. Most associations rely on chapter-reported or anecdotal information which, on our close inspection, is usually incomplete and/or inaccurate in far too many cases.

In our qualitative research, CEOs and CRPs agreed their associations need a local presence for networking, education, and advocacy. Yet, without data, CEOs and CRPs struggle to confidently affirm the quality and value of chapter performance in these areas.

Given the extensive range of programs and services offered by associations to support their chapters, associations need a more effective chapter data management system, one that provides a reliable measure of member value and engagement in chapter programs.

We detected no obvious positive correlation between headquarters support and consequent chapter

effectiveness — sadly, more HQ support did not seem to produce better chapter performance. This persistent ambiguity should be a red flag to associations when considering allocation of scarce resources. If HQ provides the same support year after year, such as leadership training, but chapter performance doesn't improve, it's time to evaluate and revamp the type of support provided.

We're not arguing that chapters aren't worth the resources or effort, but associations must address the severe limitations of their current model of chapter performance assessment. Addressing this will permit associations to more effectively support chapters.

Conundrums aside, chapters do have a place in many associations. They've been an oasis for members in many associations — providing PPE, securing legislative/regulatory wins, delivering critical news, and offering comfort. However, the path to a successful future lies in navigating three deserts.

- **Data desert.** The "data desert" represents a consistent and disturbing theme throughout this research. We continue to rely on fragmented, disconnected software systems that offer a fractured view of how our chapter system delivers value to members and serves the mission. Though none are perfect, plenty of technology platforms are available that could provide a far more accurate picture of our chapters' performance and a much stronger basis on which to allocate our limited chapter resources.

  Action: Seek new technological answers and bring chapter leaders into the conversation to assure buy-in. Talk to your AMS vendor and chapter technology partners about solutions, and challenge your IT/digital staff to meet this opportunity.

- **Volunteer desert.** One CEO observed, "The grass is always greener... where you water it!" Our volunteers represent a precious resource that we tend to waste by asking them to spend their extremely limited time dealing with administrative checklist functions rather than member service and the mission.

  Action: We need to apply resources, especially technology, that reduce or eliminate the need for volunteers to fulfil those administrative roles. We must build a volunteer development program that supports and places our volunteers in roles where they are most likely to succeed.

- **Strategic desert.** CEOs, CRPs, and chapter leaders spend far too much of their collective time in the tactical weeds. We must step back and view our chapters as one part of a vibrant ecosystem working collaboratively to serve the member and move the mission. We allow ourselves to be hamstrung by territorial squabbles that reinforce an "us versus them" culture. Let's throw off our HQ shoes or chapter shoes and put on our member shoes so we can focus on why we're here in the first place.

  Action: To get beyond the chapter volunteer and staff blinders, talk with members about their experiences. Tap behavioural data to uncover how members are interacting with their chapters. Develop chapter member personas and walk through their experiences in a journey mapping exercise.

A final note: At the core of chapters are volunteers. Coming in late Fall 2022 is the ASAE Foundation report on effective volunteer models which will offer a roadmap for shoring up this core.

Peggy Hoffman, FASAE, CAE ■

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Optimal Resourcing for Success:
Volunteers Vs Outsourcing Vs In-House Team

For associations and other NFPs, one of the key issues is finding a balance between resources required and funds available. Here we explore the various ways to optimise output through a variety of resourcing options.

Volunteers

The backbone of many associations – particularly smaller-scale ones – is their willing base of volunteers. Typically rising from the membership, these individuals give large amounts of time and passion to the cause and know the sector well. They can contribute greatly, but care should be taken to ensure cultural fit, a focus on high-level goals and having a structure in place which allows for smooth succession.

Types of roles

- Board of Directors
- Subject matter experts
- Committee members

Should be

- Focused on strategy
- Guiding and directing

Upsides

- Cost-saving
- Passionate and motivated
- Strong sector knowledge

Risks

- Not their first priority (deadline issues)
- Loss of IP through frequent change-over
- Skills-match may not be optimal
- Personal politics
- Lack of consistency in processes

Outsourcing

Many associations opt to outsource some, if not all of their operational roles. This model can work either short or long term and can include everyone from receptionist to CEO. The flexibility that this model affords to organisations, particularly where revenue is unpredictable or workload is variable, holds huge appeal and benefits. But, it requires very clear boundaries, Service Level Agreements and management. Your Board (of volunteers) plays an active role in the success of the outsourced team.

Types of roles

- Administration/bookkeeping
- Operational management
- Specialised skill sets (eg public relations, graphic design, human resources)
- Project work
- Roles with variable workloads

Should be

- Operational and process driven
- Goal/output driven
- Ultimately accountable to the Board

Upsides

- Minimised risk where revenue is uncertain and/or workload is variable
- Can engage all the skill sets you need without increasing fixed costs/headcount
- Flexibility to increase/decrease with projects and general workload
- Will work to your deadlines and priorities

Risks

- Generally not experts in your sector
- Can take time to train/on-board new people or teams
- Can lead to loss of continuity of team and relationships
- Can be perceived poorly by members

In-house

Sometimes seen as the holy grail of resourcing models, perceived as giving legitimacy to an organisation, there are benefits to having your 'own team', particularly around the strength of relationships with members. As a smaller-scale organisation, directly employing staff can come with significant risks and for this reason, in-house resourcing is most often seen where revenue and scale are larger and growing.

Types of roles

- Administration/bookkeeping
- Operational management
- Specialised skill sets (eg public relations, graphic design, human resources)
- Project work
- Roles with variable workloads

Should be

- Operational and process driven
- Goal/output driven
- Ultimately accountable to the Board

Upsides

- Increased consistency of team
- Strong relationships with members and stakeholders
- They develop deep knowledge of your sector over time
- Will work to your deadlines and priorities

Risks

- Committed staffing costs regardless of workload
- Jack-of-all-trades team members rather than specialised skill sets
- Loss of nimbleness and adaptability
- Time and cost of looking after a team (office expenses, human resources management, workplace health and safety commitments, insurances etc)

There tends to be a natural evolution through these various models; start-ups and micro-organisations often establish themselves through the hard work of generous volunteers, gradually engaging some outsourced team on an as-needed basis until workload and funding allows for engagement of an in-house team. There is a lot of cross-over between models as organisations gradually evolve and adopt a hybrid of two or all options. For most, the Board will always be made up of volunteers. However, for the operational roles, determining the optimum structure needs to be based on a variety of considerations, including for example:

- Your strategic goals
- Your budget
- The variability of your workload and/or revenue
- The variety of roles and the degree of specialisation you require

There is no set-in-stone right or wrong. There can only be what works for you now. The key is to have a solid strategic plan and a Board which is flexible and open-minded about how best to achieve your goals. Ultimately, the most important question you should be asking in determining staffing structure is 'What model will best serve our members?'. That is, after all, the end-goal for every association.

Julie Krieger ■

Onsomble founder, Julie Krieger, believes in the power of associations to make positive change in our society. A self-described problem-solver, Julie's super-power is in cutting through the noise to find the heart of an issue and then developing practical and fruitful solutions. She brings intuition, EQ and a positive mindset to each challenge.

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The Real Reason
Members Lean Out

Erika sat at her desk with a mug of steaming coffee and popped her email open. Since she joined the association three weeks ago, she'd been scanning the daily digests that chronicled activity in the online forum. Sometimes the topics were interesting, and occasionally, an idea caught her eye that she could use immediately.

Today was one of those days. She was just about to make her first entry. A quick thank you to the commenters for their thoughts and a note about how she would modify the idea for use in her organisation when she glanced at the title of the thread below it.

Another member had asked the group a question Erika thought was relevant. Eager to read the answer, she plunged into the first response. The words were startling in their bluntness, and Erika reread them, wondering if she had misinterpreted. Nope, she was right. The response felt abrupt, dismissive, and condescending. Erika noticed those hot feelings of shame even though she hadn't even asked the question.

She deleted the few words she had typed and exited the community without leaving a reply.

It is difficult to articulate when things 'feel off,' so members rarely share why they don't participate, stop contributing, or leave our community altogether. When feelings of being unsafe whisper in their brains, they may shrug their shoulders and think, "I guess this community is not for people like me. That's too bad." The community is likely for people precisely like them, but they've gotten a cue that it is unsafe.

Feelings of safety are one of the foundations for engagement. Our brains are highly attuned to picking up on signals that indicate whether it is safe to join in, share, and ultimately let our guard down and belong. Without intention, groups may default to behaviours that unintentionally exclude other members.

There are many ways to let new, current, and prospective members know that this professional community is safe. Here are a few.

Connect early

Warm welcomes are the first impressions that signal safety to new members and first-time attendees. Early greetings, even something as quick and straightforward as a genuine smile, can demonstrate how friendly the community is before members start to wonder. You may call or email new members using a very warm tone. Welcome attendees with big smiles and chit-chat, whether in-person or online. Perhaps make a special effort with first-time attendees by welcoming them by name and, if time allows, introduce them to a long-time member.

Model behaviours

Often members are looking for signs about how the group behaves, which means we as leaders can nudge the group's norms by modelling the behaviours we want to see. Think of all the actions we can demonstrate that can help members feel a sense of safety – approachability, warmth, friendliness, openness, generosity, and intent listening are just some. What would you add to your list? Start demonstrating one or two of these behaviours at your next event, and you might see colleagues start to model their behaviour after you.

Address loneliness

Often members tell me they are the only ones like them in their office, department, or organisation. Many professionals are lonely, and loneliness coupled with feelings of being undervalued can leave professionals feeling discouraged and frustrated – perhaps they may even leave the profession or industry in search of a more welcoming environment. Associations can be the antidote for some of the loneliness that pervades the world of work, especially when we make addressing loneliness a goal. I've heard chapters making time to swap stories so members realise many others have had similar experiences. Alliances intentionally form for members who are the most overlooked and underrepresented. Event hosts notice how difficult it is to start relationships while networking, so they look for more ways to cultivate lasting relationships.

These are just some ways to make our communities safer to share, participate, contribute, and volunteer. It may be worth starting a conversation with leaders to identify the common places where feelings of safety might be jeopardised in your association. Knowing where the problem is can help you reverse-engineer a solution.

Amanda Lea Kaiser ■

Amanda Lea Kaiser is a popular keynote speaker for audiences of association leaders worldwide. She is at the forefront of exploring how member and attendee engagement is rapidly changing within professional communities. Her new book Elevating Engagement: Uncommon Strategies for Creating a Thriving Member Community, publishes Valentine's Day, 2023.

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How to Nurture Engagement
in Your Online Community

Launching your online community is hard work. Getting the strategy and technical pieces together are all important pieces, but how do you bring members in and get them participating?

The high of launching your community feels like enough to keep you going for weeks, but if you've built your online community without thinking about bringing new members in then you've missed the mark. Communities are not meant to be launched and then left. But how do you go about the business of bringing new people in? If you're aligned with the strategy of the business, this is easier than you think.

Lean on your early adopters

In the planning stages of your community building process, you likely had conversations with potential/existing members to understand what they are looking for in a community experience. There's also a likelihood that there were a handful of those people that stated they'd be willing to help get things going. These people would be your early adopters for your community – those who already believe in the power the community can hold and are willing to volunteer their time to ensure that it gets off the ground running. They could be subject matter experts, existing volunteers, or members who are eager to have a community they can interact with online. Don't be afraid to go back and ask them to devote a little time to starting conversations and answering questions at launch. Recognise them in the community with a special badge or member spotlight early on to show them that their efforts are appreciated. It goes a long way.

Think about cross-functional collaboration

If you have an open community, there's an opportunity for you to bring people in and connect them to the information and resources that your association offers. That said, this is a great opportunity for you to connect into your association's marketing, content, or communications team to work together to create awareness for the online community and for information and communications that may not have as far of a reach as typical activities would have. The caveat here is to do this strategically. You'll want to avoid having the community become a marketing machine which diminishes the value for your community members and, quite frankly, for your association. There's a delicate balance here, so make sure you stay close to your strategy when engaging this way.

Importantly, the Act also created a requirement that all online platforms operating in Australia allow users to report content or individuals to a platform administrator or moderator. If the tools you're using don't have this basic functionality, consider a change. They're risking harsh penalties and there's an array of better options to help keep your community safe.

Hold a virtual open house

This is especially useful when you initially launch your online community. It helps people understand why you exist and gets them connected quickly to what your community has to offer. In 2015 when I was working for a professional membership association, we launched our new online community program and were trying to figure out how to generate excitement and get people involved (this community launch was replacing an old community model and simultaneously deconstructing a volunteer model around that community). A colleague of mine at the time thought of the idea of holding a virtual open house. We included communication about it in chapter emails, member newsletters, and in news that appeared on the association website. The day of the open house, we had a ton of traffic and offered a bunch of ways for people to engage. From webinars and ongoing discussion threads to a downloadable eBook, there was something for everyone who visited the online community that day. And it helped remove any mystery around how people could interact or why the online community existed. The key here is to not let that excitement die once the open house is over. Continue to offer similar experiences (no matter how big or small) to get people coming back and engaging.

Creating opportunities for ongoing engagement doesn't have to be difficult. The great thing about online communities is that you can meet members where they are and help them discover what's valuable for them. It doesn't have to be grand or flashy, it just needs to be relatively easy for members to participate and should foster a sense of community that they cannot find anywhere else.

Marjorie Anderson ■

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Know Your Responsibilities
When Gathering People Online

In her book, *The Art of Gathering*, Priya Parker writes about the responsibilities of bringing people together. She describes the fallacy of the 'chill host', who, fearing they will make it all about them if they step into a guiding role, plays it 'chill' and leaves guests to mingle. This may feel like a smart community building move, but it's actually a killer. Members feel unmoored, dominant voices fill the void, and psychological safety – an essential community building block – becomes precarious.

As more and more associations realise the importance of gathering their people online, they need to consider their legal and moral duty to create a safe space where those people can thrive in relation to your organisation's purpose. Don't fall into the trap of 'chill hosting', rather, be an engaged host that steers an optimal shared experience and creates critical guardrails.

That's where moderation comes in. Often misunderstood as merely 'removing the bad stuff', moderation is holistic and strategic work that informs the effectiveness and the experience of our communities. And, in the wake of growing regulatory moves in Australia and other countries to better protect people online, it's now also a question of compliance.

There are two main types of moderation your online community manager should be thinking about: regulatory, and cultural. Regulatory moderation means the actions that help you stay compliant with laws, regulations and official guidance from government and other institutions (such as rules around hate speech, defamation, and cyberbullying). Cultural moderation covers those actions that relate to content and behaviour not necessarily regulated by law but deeply relevant to your unique community and its social norms.

The most common risks dealt with in online communities in Australia include defamation, hate speech, bullying and threats of harm (to self and others). Though they typically occur less often in communities of purpose or practice that sit outside social media platforms, they still happen, so don't be caught off guard.

Let's look at two simple but important compliance considerations you'll need a plan for – defamation and bullying.

In Australia, since 2019 (the Voller versus Nationwide decision), anyone gathering or hosting people in a shared online space is now liable for defamatory content posted by their users or participants within that space. This applies to public social media platforms, your association's online communities and internal workplace communities equally – in each case you're considered 'the publisher'. This means you need protocols, processes and people to help you guard against the risk of defamation and allow prompt action if you believe that risk is present. Court cases against online community administrators (and their organisations) are increasing, and those without these things in play are not faring well. Protection doesn't require 24/7 hyper-vigilance – just that you have a clear plan, and a trained moderator to execute it with context.

Online harassment is already covered under Australian criminal codes, but our newly minted Online Safety Act (introduced in 2021 in conjunction with the eSafety Commissioner), ushered in world-first anti-cyberbullying provisions that give adult

targets of online abuse more options for redress and accountability. There are now significant fines and possible imprisonment for those engaging in a pattern of harm-inducing behaviour. Since the adoption of the Act, online community owners are increasingly sharing eSafety reporting links and resources with users. While your existing moderation practices should identify and act on this behaviour already, it's valuable for your members to know the full extent of options available – especially if they're being targeted outside your community and the ripple effects find their way into your space.

Importantly, the Act also created a requirement that all online platforms operating in Australia allow users to report content or individuals to a platform administrator or moderator. If the tools you're using don't have this basic functionality, consider a change. They're risking harsh penalties and there's an array of better options to help keep your community safe.

Here's a starter moderation and governance checklist to help you stay compliant with current Australian laws and build a safe, thriving community:

1. Ensure you have clear Community Guidelines that both stipulate prohibited behaviour (noting Australian regulatory requirements), and call out what it means to be a great community member. These should be agreed to as part of your member onboarding journey. They don't have to be a boring old list – you can be creative in their presentation.

2. Create a Risk Matrix that ranks your leading risks and for each, what actions to take, who to notify or escalate to (including contact details and back-ups), and timeframes to abide by.

3. Engage in regular moderation record keeping, which you'll need if things go sideways. Some platforms offer moderation audit trails or admin note-taking features, or you can use a simple spreadsheet as a shift report or incident log. Keep it simple and consistent.

4. Consider a Response Guide to act as a playbook for common and high risk scenarios that includes templates, guidance around tone and links to relevant resources (such as support services for mental health).

5. Ensure you have moderation by a human happening – consistently and consequentially. Automated tools can be helpful, but nothing beats a trained moderator who understands your key responsibilities, and the unique culture of your community.

Venessa is Australia's leading expert in online communities. Her many clients include Woolworths, Australia Post, ABC, SBS, AASW, FEW and Teach for Australia. She is Director of Australian Community Managers, the peak body for online community management practitioners, and she teaches online community management at the University of Sydney, where she is pursuing her PhD.

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Venessa Paech ■

Why Your Association Needs Content Strategy

Your association exists to provide value to members, and likely to improve the profession or niche in which your members operate.

That value comes from the products, programs, services, information, resources, and tools you create.

What is content?

Your valuable offerings manifest themselves in the world as content: words, pictures, audio, or video.

Some examples:

- Advocacy issue updates
- Books
- Conference proceedings
- Clinical practice guidelines
- Courses
- How-to information
- Industry standards
- Legislative talking points
- Program information
- Original research
- Webinars

Regardless of the format – text (articles, blog posts, web pages), infographics, videos, PDFs, graphics, etc. – it's all content.

Who creates associations' content?

Association content is created by staff or member subject-matter experts (SMEs) – conference planners, government relations folks, course developers, researchers. SMEs often lack experience communicating to audiences who need the information. As a result, members may not know about your valuable offerings and may question the value they get from membership.

But it doesn't have to be that way.

If you treat your content strategically, members are more likely to:

- Use the programs you create for them
- Support your efforts to shape industry-positive legislation
- Register for courses
- Download research
- Attend conferences

Members who use your content will have more favorable opinions of your organisation, and are more likely to renew their membership and recommend your association to industry colleagues.

What is content strategy?

Content strategy is the practice of planning for the creation, publication, delivery, and governance of useful, usable, effective content.
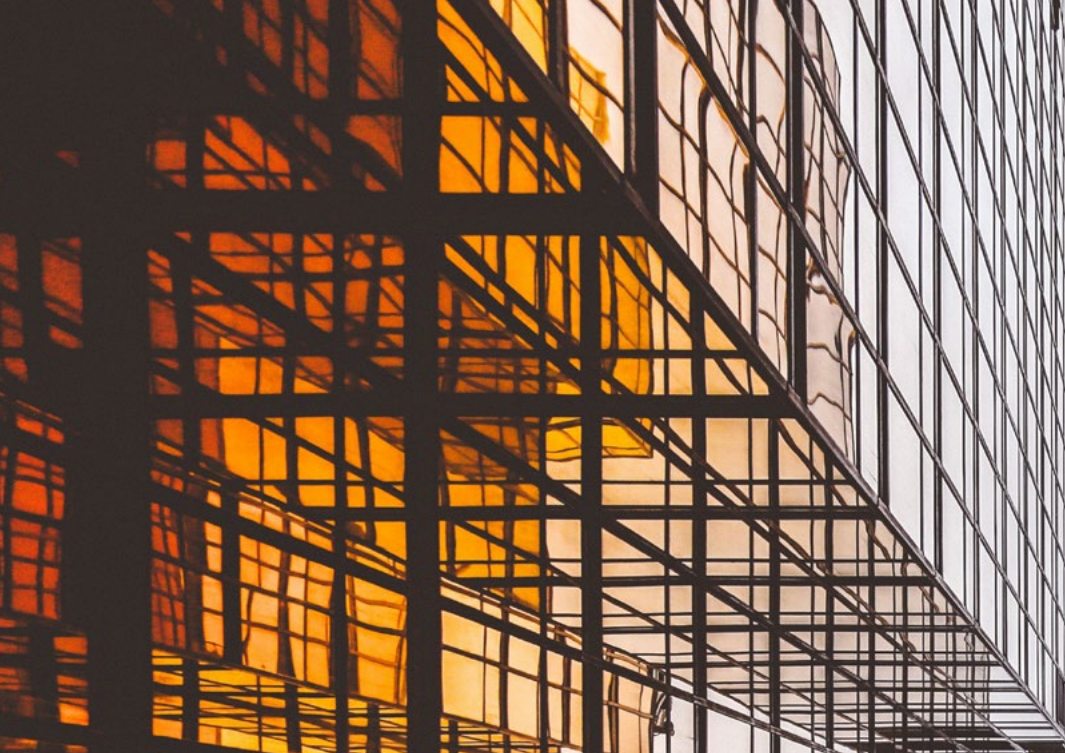
Useful means content is presented so its relevance comes through loud and clear

Usable means content is easy to find and act on

Effective means that content meets its goals

The objective of content strategy is to get the right content to the right person at the right time for the right action.

Why content strategy?

Smart organisations align their content with their strategic goals. This means several things, as listed in [Association Content Strategies for a Changing World,](#) a report published by the ASAE Foundation in 2019:

- Each piece of content it produces has an explicit, measurable goal tied to a specific outcome of the program that the content is about and a clearly articulated audience.

- Content is created in a way — terminology, readability level, format, length, timing, etc. — that resonates with the audience.

- The people with expertise in creating, publishing, and promoting content work in partnership with subject-matter experts managing the organisation's offerings to ensure that the content about and from those programs achieves its goals.

- The organisation evaluates content to determine whether the content meets its goals, and that information drives decisions about what to do more of, do less of, or do differently.

- Subject-matter experts work in partnership with each other to determine when to collaborate, when to cross-link, and when to reuse content that another department has created.

(I was a co-author of this report, along with Carrie Hane and Dina Lewis, CAE.)

Content strategy is a key way associations can make sure that the content about their work is published in a way that resonates with the audience and, therefore, has the greatest chance to succeed.

Hilary Marsh is president and chief strategist of Content Company, a consultancy that helps associations and other content-rich organisations engage audiences and get better results by improving their content practices. She is also a frequent conference speaker, leader, teacher, and mentor.

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Why Your Association Needs
Content Strategy

What does it take to have a content strategy?

Content strategy consists of six building blocks, each with several tactics:

- Know the organisation
- Know the audience
- Ensure content effectiveness
- Plan and promote content
- Support content with structure
- Sustain with content governance/operations

We will dive into the blocks and tactics in more detail in the next article, but for now it's enough to say that not every organisation needs to use all of the tactics to achieve content success.

Starting your content strategy journey

Every organisation's journey to content strategy is different, because associations have such a diverse set of sizes, focus areas, staff composition, challenges, and industry dynamics.

To get started, take stock of where you are now and start planning content better:

1. Learn what content you have now with a content audit. You'll likely uncover content you didn't know you had, content that is outdated, or old versions of current information.

2. See how your content is doing. Start by collecting analytics data for each piece of content currently live on your website. You may be surprised at how much outdated or little-used content you find.

3. Start conversations across the organisation about current and upcoming content. Identify opportunities to collaborate and cross-link content that is relevant to the same member segment or used for a common purpose.

Find colleagues who already realise the need for a more strategic approach to content. They may be in communications, education, marketing, information technology, or a program area. If you work together, the journey will be easier.

This article is the first in a three-part series. Read the other two:

- How a Content Strategy Will Help your Association Thrive

- How to Determine Whether Your Content Strategy is Succeeding

Hilary Marsh

Are you Leading the Conversation, or Just Following it?

As anyone who has witnessed the triumphant return of in-person conferences after two long years of online or hybrid events can attest, it's lovely to be back.

And with many associations recording their best event attendance in years, it's clear it's not just association staff who are enjoying the chance to get out from behind a screen and see real live people again.

Fostering connections has always been a key part of the value of associations, and the wholesale return of big forums for connection has put wind in the sails of many associations.

As we re-embrace the power of events to connect with our members, however, it would be a mistake to think nothing has changed.

While events may be booming, associations are nonetheless seeing their traditional value proposition being eroded on multiple fronts.

There are new providers of CPD points, new centres of influence and new forums for networking and training. The pandemic strengthened the footholds of many of these disparate sources of competition. It also accelerated the shift to digital experiences, particularly among younger members.

For most associations, content came to the fore during the pandemic, especially during times where in-person events were not possible.

For many, content became more important than ever in fostering meaningful connections with members.

And while some focus has rightfully returned to events, rethinking and refining your approach to content can pay dividends in bolstering your value proposition.

Are you Leading the Conversation,
or Just Following it?

A shout, not an echo

Association content – whether it's a beautiful print magazine, up-to-the-minute digital news, or a lively podcast – is routinely rated as a key member benefit. It's also often a key tool for member acquisition.

And that is exactly how many associations treat their content – as simply a member benefit.

Their content might be the best source of news for those in their industry. It might be a trusted authority on the trends shaping the sector. It could win awards for the stories it tells.

But if all this content does is amplify and echo the conversations already taking place in the industry, it's not working as hard as it must in today's world.

Your content can be so much more than a member benefit – it's also potentially the most powerful channel for communicating your broader member value proposition, which in essence is enabling your membership to shape the tomorrow of their industry alongside you.

To be clear, this doesn't mean the occasional news piece about your advocacy wins, or a letter from the CEO, or information about upcoming events.

Instead, your content can be a platform for driving – not just echoing – the conversations in the industry.

And driving those conversations can be an incredibly powerful way to drive member retention and acquisition.

More than a cost-benefit analysis

It's all too easy to think that people approach membership as a simple cost-benefit analysis – putting in x dollars in exchange for y in member benefits.

But research has shown that is only half the story.

When people join an association, it is also because they want to belong to something larger than themselves. The excitement with which people returned to big national conferences is just one small expression of that.

A powerful thread that binds members of a professional association is a shared commitment to a common purpose – and the association that wants to stay relevant must weave that thread into a flag that everyone – members and non-members alike – can clearly see.

This is why we are seeing leading associations taking public stances where previously they have let others do the talking.

It's manifesting in everything from campaigns around industry remuneration to ambitious visions on sustainability.

Crucially, they are doing more than putting out position papers or government briefings. They are mapping their content calendars to their stances and advocacy, including the membership and taking them on the journey with them.

This means wrapping policy, advocacy, marketing, content and events together in the planning stages, ensuring alignment on themes and amplifying your key messages.

Beyond members

The stances these organisations are taking are informed by their members – through formal surveys, through regular conversations, through feedback.

Of course, the better an association can understand its members, the better it can drive the right conversations, those that mean the most for the industry and those that work in it.

But for the association that is trying to not just retain but also to grow membership, understanding non-members is just as crucial.

We are working with more associations to connect with those who have chosen not to affiliate, to understand:

- Where they differ from members
- Where they are the same
- What preconceptions we need to consider countering
- Where they are turning for industry information, networking and training instead
- What their journey to membership looks like

This way, associations can be confident the flag they are flying is one that current non-members can rally behind too.

Takeaways

- Joining an association isn't just about member benefits – it's also about belonging to something bigger.
- Consider how your content can drive industry conversations, rather than just echo them. It matters to your members.
- Ensure your content is engaging by always talking about your advocacy from a perspective of what it means for your members.
- If you're not regularly surveying non-members, you're missing one half of the picture.

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Attention Economics:
The Bottleneck of Human Thought

When he defined the concept of attention economics in 1971, Nobel Laureate Herbert A. Simon wrote that "...a wealth of information creates a poverty of attention." Fifty plus years later, and in a data-rich world, the overwhelming wealth of information available to us has led to a scarcity of the commodity which information consumes, our attention.

When defining the membership proposition, we quite rightly focus on providing high quality products, delivering relevant and timely services, and realising value for money, all of which combine to ensure an exceptional experience of membership; but the membership proposition is only valuable if members know about and recognise its value, and consequently engage proactively with its constituent parts, i.e. if we capture and retain their attention.

Simon aptly described attention as being "...the bottleneck of human thought" that limits both what we can perceive and what we can do with the information when received. When we 'pay attention' to one thing, we inevitably ignore other things, affording a distinct and tangible value to our attention. As vast swathes of content continue to grow increasingly abundant and immediately available to members, their attention has become the single limiting factor in their consumption of an association's proposition; and within this context, members' attention should be understood as the single most valuable commodity driving associations' business development. We can derive attention's value from how much time we focus on a particular thing and so being cognisant of how to capture and retain members' attention is critical when developing and delivering the value proposition.

Our attention has always been limited, valuable, and scarce, but what distinguishes the present day is the prevalence of technology, which makes an overwhelming amount of information available, all of which is strategically aimed at capturing our attention. There are 4.48 billion active social media users[1], each averaging nearly 2½ hours a day on their devices, accessing one or more[2] of 150+ networks.[3] Indeed, as the scale of Instagram and TikTok becomes increasingly impersonal, a new generation of social media companies including BeReal, Locket Widget, Yubo, and Poparazzi have spotted an opportunity to prioritise intimacy over infamy, and all are jostling in a cluttered and competitive market to capture and retain our attention. We've spent a lot of time over the last 30 years talking about the information economy, as though information (and latterly 'data') is the valuable commodity, but it's not. It is attention that is the valuable commodity, because attention is limited, and therefore it is scarce, and therefore it is valuable.

Many (for-profit and non-profit) businesses understand the scarcity of our attention and are adapting their business models to capitalise on it. For instance, music streaming services like Spotify and Amazon Music have two revenue streams, allowing you to either monetarily pay for ad-free listening, or to pay with your attention and listen to adverts. Attention should not however be viewed as the end in itself but rather as a means for leading members down a path to sustained engagement. The challenges of the attention economy are sophisticated, and they are multifaceted, and therefore our response has to be equally sophisticated and multipronged. Ten years ago, if you wanted to increase traffic and membership leads, the formula was simple: publish more content.

Today however the equation is nowhere near as straightforward, requiring instead a complex blending of approaches:

1. Immediacy: provide priority access and/or immediate delivery;

2. Personalization: tailor content for the member, not just the membership;

3. Interpretation: provide support, guidance, and context in understanding a given topic;

4. Authenticity: provide real advice from real people;

5. Accessibility: provide content that is available when and where members want it;

6. Embodiment: consider the format is which content is delivered;

7. Patronage: offer "tipping" for content rather than a one-off, all-inclusive fee; and

8. Findability: filter out irrelevant content and surface the good stuff.[4]

The mental capacity of humans is limited, and the receptiveness of information is hence limited as well. As you set out to capture potential members' attention or to sustain members' attention, pause. Fight the instinct to produce more content. Battle the compulsion to create new services. Challenge the assumption that more stuff equates to more value. Instead, reflect on the realities of working in the attention economy. Rather than look only at the value proposition, examine your marketing methods, recognising that the way to capture attention today is not to shout more or to shout louder. Instead, think carefully about how you can adopt new strategies that help members navigate the information deluge and allow your association to prosper in the modern attention economy.

[1]   Constituting 56.8% of the world's population.

[2]   Users typically access on average 6.6 social media networks.

[3]   See the Influencer Marketing Hub's Social Media Marketing Benchmarking Report 2022 (https://tinyurl.com/fuya3fjy) for fascinating insights into users' behaviours, network trends, and analyses of the various impacts of social media.

[4]   Eight strategies to survive in the attention economy (Kevin Kelly, 2008) www.edge.org/conversation/kevin_kelly-better-than-free

Andrew Chamberlain ■

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How to Reset
Your Communications and Marketing Teams

Associations who have successfully come through the peak of the pandemic, are now finding their communications and marketing strategies in need of an upgrade. This makes sense, as the market, membership, and consumer behaviours and expectations have shifted hugely over the last few years and as such, brands, messaging and even positioning can appear tired, less impactful, and in need of a refresh.

Communications management guides the strategic, deliberate, sustained and measured two-way relationship an organisation has with its stakeholders. So, when our stakeholders change, so too must our communications.

But how to go about this in a way that engages the team, stays in budget, uses your existing resources, and reaches a new height of effectiveness?

Where are you at?

Many associations saw their communications dictated by pandemic-related updates and news flashes. This was a valuable contribution by associations, however, as a result some marketing teams have become disconnected from their communication goals and even the strategic plan.

Communication strategies written pre-pandemic are now out of date, irrelevant, or even forgotten, and this may manifest as an ad hoc social media feed, tired looking graphics, dwindling e-newsletter open rates, or a dated website.

Most CEOs I've spoken to talk about a need to 'reset' and 'refocus' the marketing effort, and the best team structure and skills needed to get the communications back on track.

The work of communications in a crisis or prolonged time of stress is different to communications work in a 'normal' state. Some marketing teams are still caught in the short-lead, reactive ways of working, typical of the last few years, and need to stop, reflect and reset.

The workforce challenge

Associations need to ask: Do I have the right team in place? Do I remove, replace, outsource or invest in my people?

The answer lies in an overlapping number of issues that need to be considered individually and then as a whole. The below framework will help associations determine how to structure their teams going forward.

1. Where are you headed? – your strategic plan

Professional communication managers know and understand your purpose or 'why', your audience profiles and what it is communications can do to help the organisation achieve its strategic plan.

They then use communication tools to activate the strategic goals, such as brand, member communication, engagement, sponsorship, product development, marketing, public relations and advocacy.

2. Strategic communications roadmap

The next step is to develop the communication goals – signposts about what success looks like, and what difference we want to inspire.

A communication goal could entail articulating your value proposition to your membership group and stakeholders, advocating for the profession

you represent to state and federal Members of Parliament, or reviewing and rebuilding your offering to members at each stage of their professional journey, etc.

Goals set the destination and impact for the work, then you look at how the work will be done.

3. Communication strategies

This is where we all want to get to, work descriptions as actions. I.e., to raise the issue, we are representing to a certain audience group, we might run an awareness week campaign or a public relations campaign. These are the strategies that determine what skillset, experience and resource level we need in the team.

4. Now you can assess the team

Only by knowing the scope of the strategies, informed by and connected to the strategic goals, can we start to unpack what and who you need in your communications and marketing team.

The professions of communications and marketing have grown and evolved rapidly. The scope ranges from being a copywriter, PR specialist, designer, photographer, strategist, search engine optimisation specialist, event organiser, videographer, speech writer, and everything in between. Each of these skills is a specialist area, so I encourage leaders and CEOs to honestly consider: What are the skill expectations you have of your team, and are they appropriate to the level of experience and package you are offering?

5. Remove, replace, outsource, or invest?

The skills and make-up of your team needs to be assessed against the communications strategies you want to implement. What can they do, want to do, or want to learn to do? Here are some questions to ask yourself.

- What do you need in-house and what could be outsourced?

- When communications is looking after publications, marketing, events, membership engagement, sponsorship and the website, have you allocated enough budget to do this right?

- Do your team want to learn more skills, or are they resistant to training?

- Are you willing to invest time into staff training? Or do you need results immediately?

- Do you understand what it takes to do this work? It is important to understand the process to do something such as write, build and distribute an e-newsletter to know how to cost it.

- What value does your organisation place on this function? Does your Marketing Manager address the Board or present and deliver on an annual budget?

These issues matched with the attitude and energy of your team will help you consider the best way forward and deliver a communications and marketing program that will help you achieve your strategic goals.

Felicity Zadro BA MA GAICD ■

Founder and Managing Director of ZADRO, an integrated communications agency, and Zadro University (ZU), an online training platform for marketing and communication professionals, Felicity is inspired to support organisations to make meaningful and authentic connections with their communities through the power of excellent communications.

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Trends in Revenue Diversification

In our White Paper – The Future of Associations: diversifying portfolios and increasing revenue (launched in July 2021), we asked the hard questions of associations such as what do your members need now? Where is our revenue going to come from? And how do we insulate ourselves from the next disruption?

Since then, associations have battled new challenges: workforce shortages, information technology transformations, cancelled conferences and finding new ways to connect. The landscape has shifted; it is a good time to pause and reflect on the big trends in association revenue today.

1. Where will revenue come from in the future?

Since then, associations have battled new challenges: workforce shortages, information technology transformations, cancelled conferences and finding new ways to connect. The landscape has shifted; it is a good time to pause and reflect on the big trends in association revenue today.

2. Replacing one revenue gap with another

Some associations have done very well to pivot their big income stream from their conference to their education offerings. Whilst this represents a significant piece of work for many and has kept organisations afloat during this time, it also comes with risk.

Education is undoubtedly a big revenue earner and I fully endorse this as a long-term sustainable revenue stream. However, replacing one big chunk of revenue with another, is not mitigating the risk of reliance on one key product; the key to risk mitigation is spreading the load.

3. The two ends of the bell curve

Whilst successful associations are engaging members at their peak professional age, an ongoing challenge for many is targeting the youth market and the ageing population.

This goes right to the heart of the conversation of membership value. The work is to keep your offering relevant for younger people (and the price right), as well as keeping the experienced members engaged (and paying) when they aren't necessarily benefiting from the full range of services.

Conversations associations should be having now

The way an association will work through commercialisation and revenue diversification issues will depend on the structure of the team, strength of the board, current program and product mix, history, culture, purpose and financial reserves. However, I encourage all associations to find the people and time to have the following important conversations.

- **Whose job is commercialisation and revenue diversification?** Often it sits with the CEO or even the CFO, however, being clear on who needs to ensure these issues are on their agenda, and who has the resources and time to deliver, is key to moving ahead. This is a capability building and skills issue, as much as a revenue structure one. In some larger associations we are seeing the emergence of a Head of Commercial – a role responsible for the commercial objectives of the organisation, which reflects a change that evolved out of the corporate arena a few years ago.

- **What is paying for whom?** Even in associations with diverse portfolios it is common for some revenue streams to be 'carrying' others. Is your education stream funding the membership? Is your advertising funding your webinar series? There are many ways to view revenue and how it is spent, however, it is wise to understand how it balances out and what the true cost of a revenue stream is

- **Is our reliance on membership fees a risk?** Many associations continue to rely heavily on membership revenue as their core revenue stream; if your membership revenue represents more than 65 per cent of total revenue, it can be a major risk to your sustainability if you don't also have additional streams that are profitable and 'low risk' or 'non-volatile'.

- **Are we searching for new audiences?** Does your association have access to the data that is needed to keep members, and find new ones? And if you have the data – does your association recognise how 'rich' that data is, its true commercial value?

- **Are our pricing models right?** Are you giving away too much for free or undervaluing your offerings by including it all in the one membership tier? For example, if non-members or subscribers can get access to your content for free or a very low fee, do they have incentive to become a member (if that is the goal)?

Hold your nerve with new products

If you've done your due diligence, then trust your new products you take to market. They likely won't all work, however, give it time and invest properly. It is not easy to take new products to market, and building audiences takes time. This is where your Risk Appetite Statement holds its own. Refer back to your Risk Appetite document, and if your organisation doesn't have one, this is another good reason to invest in one in order to ascertain the level of risk (financial, resourcing, time) your organisation is willing to take.

Today is the rainy day

We are hearing boards are nervous and reluctant to spend money reserves, and so are instead cutting costs and value from the offering, rather than investing in staff and products. We are living through the 'rainy day' now. It is time to invest if you can and prepare your organisation for the next stage of its development.

Deanna Varga ■

Founder and CEO of Mayvin Global, Deanna is renowned for her highly attuned business acumen, extensive experience and delivery of commercial and revenue generation strategies for associations.

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Successful Association Sponsorship Programs in the New Competitive Environment

The corporate sponsorship paradigm has shifted in two important and related ways:

- First, associations are not "sole source".
- Second, associations are not immune from competition.

Associations often tell companies, "If you want to reach our members and teach our members, you must be a sponsor of our association". (I said this to companies when I was VP of Corporate Partnerships for a national association.)

In fact, companies have many choices when it comes to reaching and teaching members of associations. Each of these choices is competition for associations' sponsorship programs.

Some associations believe that mission-focused, not-for-profit organisations are immune from competition. However, companies are usually spending their marketing dollars on sponsorships. Therefore, having many marketing choices is competition for associations.

While these paradigm shifts began more than a decade ago, they accelerated during the pandemic. Conferences and expos were the primary benefits many associations offered to sponsors. When conferences and expos were cancelled – or went virtual – companies found other ways to engage with association members, which created more competition for association sponsorship programs.

Competitors to Association Sponsorship Programs

Many companies have methodologies in place to determine where to spend their marketing dollars. Some companies use formulas like "return on investment" or "cost of customer acquisition" to compare the value of various marketing opportunities, including sponsorships.

When your association strategises about creating sponsorship programs and benefits to entice companies, here are the competitive forces to keep in mind. How can your association best the competition?

- Facebook and LinkedIn posts and groups create opportunities for companies to reach large groups of people and targeted groups of people with educational and product/service information.

- Association members can use Google to find companies' educational articles, webinars, etc.

- State affiliates of national associations often provide a more targeted, segmented audience than the national association's audience.

- There are a growing number of niche organisations. These groups provide informal coffee chats, networking opportunities, and webinars that attract members' interest.

- Members' frequent use of Zoom during COVID-19 has provided companies with an easy way to reach and present to members at minimal cost to the company and the members.

- An association's own conference can create competitive opportunities for companies that don't sponsor, exhibit, or register, however, company executives meet members in conference hotel lobbies and host dinners.

- Many of these competitive settings can provide companies with contact information for members that companies can use for follow-up messages.

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Competition among associations for sponsors

There is also competition among associations for sponsorship support. One corporate marketing executive told me, "Our company's 'sponsorship pie' is the same size as last year, however, this year we're 'cutting bigger pieces' by providing more support to associations with better sponsorship programs."

What are these association competitors?

- Members of trade and professional associations often find value from other associations with a similar or related mission (and executives are sometimes limited to joining one or two associations).

- Other associations in different professions or trades can be attractive to prospective sponsor companies that serve multiple verticals.

How to beat the competition

While all of this creates many challenges, associations do have an advantage: The power of affinity with associations can be a significant value proposition for sponsor companies. I've interviewed sponsors who express a desire to collaborate with associations. For example:

- "We want to help develop a more meaningful program. We think our participation is a direct benefit to the association's members."

- "We want more proactivity with the association."

- "What are creative ideas to reach their membership and how can we together reach their members?"

Here are three steps to plan a successful corporate sponsorship program in 2023 that addresses the competition:

1. Identify members' needs: By reviewing member surveys and having discussions with the association's staff and board members, identify the most pressing issues facing members.

2. Identify companies' expertise and business needs: First, identify each company's expertise in areas that relate directly to members' trade or profession, or more generic topics like leadership, mentoring, diversity, equity and inclusion, etc. Second, determine each company's marketing goals.

3. Partner with companies to meet members' needs: Develop and negotiate sponsorships with companies that match each companies' expertise (and marketing goals) with a member need.

Also, keep in mind that year-long, customised sponsorship packages aimed at meeting members' needs and sponsor companies' goals will be more successful than a series of transactional tactics.

Make 2023 the year to create a business plan for a corporate sponsorship program with a competitive advantage.

Bruce Rosenthal ■

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Generate Revenue and Keep Your Members by Offering a Tailored Insurance Program

Providing members with access to a tailored and discounted insurance offering is a tool used by associations to create member value and generate revenue.

It is a useful way to create value for current and prospective members while also establishing a passive revenue stream for the association.

These opportunities can be wasted if the programs are not executed effectively. Following are the common elements observed in highly successful insurance programs:

- **Excellent coverage.** You are known as the industry experts, so the products you offer members should always be best-in-class and tailored to their needs. This is even more important with insurance, because you want to be sure the policies you endorse will cover your members in a claim.

- **Highly competitive rates.** Discounting products for members is not new or complicated, but by being strategic in the way discounts are applied you can leverage it to bring in new members, in addition to retaining existing ones.

- **Leveraging activities.** The discounts available on insurance (10-25 per cent) can often save members more in insurance premiums than annual membership costs. Associations can leverage their insurance arrangements to maximise member recruitment and retention efforts.

- **Amazing buying process.** This is arguably the most important step, because value is often dictated by the experience your members have. The product itself is also important, but if the buying experience is not amazing it likely won't matter. This experience should be tailored to how your members like to engage. You might have a technology focused membership base which expects to engage online, or you could have a more traditional group who expects a personal touch from their service providers. Either way, the process should be as smooth as possible.
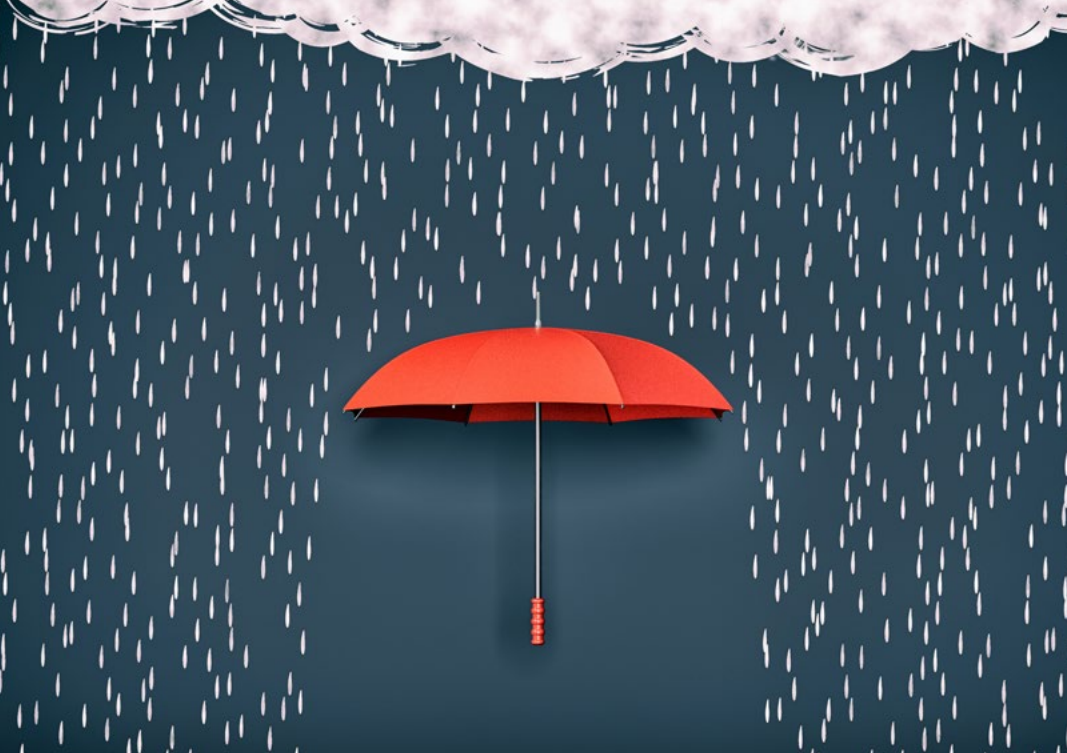
- **Availability of expert assistance.** Insurance can be complicated, and members will inevitably have questions to help them understand their insurance program and be comfortable that it will cover them in a claim. It is important to ensure your members can get the answers to questions to ensure they are getting the right insurance for their needs.

- **Scalable revenue streams.** While there may be up-front investment by your insurance partner, the big opportunity in insurance programs is in the ongoing passive revenue streams. Arrangements with partners should include a percentage or set fee from each policy sold. The passive income derived from renewals each year ensures the association receives income over the entire lifespan of the policy.

- **Ongoing marketing.** Members will already apply some value to insurance, but to demonstrate the full value of the program and all the benefits discussed above, you need to work with your partner to design a marketing plan. By demonstrating all the value that members will get out of the insurance program, you can make your membership even more sticky and increase your rate of retention.

Insurance programs are a wonderful opportunity to deliver significant value to members while also generating strong passive revenue for your association. By using the checklist above you can ensure you are maximising this valuable opportunity.

Tyler heads up the Programs Division at KBI insurance brokers. He specialises in helping associations create value for their members by tailoring insurance programs to suit their industry and membership mix. Tyler has worked with numerous associations of different sizes and industries to help attract and retain members while generating a passive revenue stream for the organisation. He is an owner of KBI and has nearly a decade of experience within the insurance industry.

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Post-Pandemic Meetings
Benefit from Different Strategies

In January of 2022, the Consumer Technology Association (CTA) held its first in-person CES (previously known as the Consumer Electronics Show) since the pandemic began. "We know it will be a smaller show this year, for obvious reasons," said Jean Foster, senior vice president at the CTA, the event's organiser.

Around 45,000 people attended the show, down from more than 170,000 who came for the last in-person gathering in 2020. CES ran one day shorter than originally planned as a result. Those who attended were required to show proof of vaccination and masks were required.

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More than 2,200 companies were expected to exhibit in person. The last pre-covid show had 4,400. More than 40 conference sessions were streamed for those attending remotely. Tech industry analyst Carolina Milanesi said, "Big industry events like this are becoming less important than they used to be" as digital technology has supplied other ways to network and keep up with trends.

I believe there will always be a segment of association members who prefer to meet in person. I also believe there is a portion who have seen the convenience, and time and money savings of virtual participation. And we've always known that there are some members that just can't (or won't) get away for in-person attendance.

From my perspective, it's not a question of in-person meetings OR virtual meetings. It's now a matter of in-person AND virtual meetings. The needs of these audiences are different and how we plan meetings must permanently change as a result.

Here are a few things to consider:

1. **Virtual and in-person don't have to be offered simultaneously.** You might have a separate calendar for each type of meeting.

2. **The approach for virtual and in-person should not be the same.** The mediums are different, limitations are different, and opportunities are different. Harness the strengths of each medium and plan accordingly. (Arianna Rehak and Leah Lazzari, CMP, offer a thoughtful approach which they call "The Tri-Brid Event Model.")

3. **When live streaming a meeting, think of it in terms of a television broadcast.** In-person attendees represent the studio audience and at-home attendees are the same as a broadcast audience. Meeting planners must now think like TV producers.

4. **Think "Before/During/After" in order to extend the impact of your meetings.** Rather than a three-day conference, what can you host a month or several weeks in advance of the meeting in preparation and to increase interest? What, if anything, do you want to livestream during the meeting (or record for presentation at a later date)? What kind of post-meeting events can you create ("Best Conference Ideas," follow up accountability groups, etc.)?

It's my hope that your members flock to your meetings and set attendance records. Monitor meeting trends and plan accordingly. Be willing to experiment and recalibrate if necessary. But don't plan to go back to the way things used to be. If you do, it will be a missed opportunity.

Embrace what we've learned about virtual meetings over the past couple of years, combine it with what we know about in-person meetings, and help invent the future for your organisation. There's no time like the present to create the future.

Mary Byers, CAE, CSP ■

Mary Byers, CAE, CSP, is the author of Race for Relevance: 5 Radical Changes for Associations. She's an association thought leader, consultant and strategic planning facilitator. She co-leads "Exceptional Boards: Strengthening the Governance Team" and is the host of the Successful Associations Today podcast.

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Three Pillars
of Event Sustainability

Sustainability, gosh... it's thrown out there a lot. I'm not sure how you feel whenever you hear it but for me, I have a couple of reactions.

1. **Confused** – This one word can mean so much and something different to each person.

2. **Daunted** – The thought of how to not just talk the talk but actually walk it and demonstrate true sustainability is daunting. As with so much we do, those asking think it's easy but we know it's not.

3. **Concerned** – What is it going to cost? Will it impact my bottom line and push my event into non-viability?

4. **Excited** – Once I get through the initial reactions, I'm then so excited and enthused at the thought of bringing something into my events that could truly make a positive difference.

What does sustainability actually mean?

According to the Oxford dictionary, sustainability means:

"The use of natural products and energy in a way that does not harm the environment."

"The ability to continue or be continued for a long time."

Personally, I love the definition that I read in Auaha,"Sustainability considers how we can meet today's needs without compromising our children's tomorrow".

Where did the concept of three pillars come from?

The United Nations outlines 17 Sustainability Goals which are wide-ranging and far reaching. The three pillars for sustainable events are loosely drawn from these but then adapted to be more specific for our industry.

What are the three pillars and what do they actually mean?

1. Environmental sustainability in events

Of the three pillars, this is probably the one that we've all done the most work on. Events can have a huge negative impact environmentally, particularly large trade shows. The Exhibition & Event Association of Australasia has been working to address this and you can read more about their 2030 pledge by following the link.

Ultimately, this pillar is about protecting our planet and minimising our footprint. When considering the environmental footprint of your event, key items to consider are:

• Reducing your carbon footprint – Think offsetting speaker flights and talking to your venue about their carbon neutrality options.

• Reducing food waste and working with food banks.

• Sourcing sustainable materials – Think beyond branded merchandise and into theming green products your exhibition supplier is using.

• The impact of your trade waste – Is it reusable, recyclable, plantable or consumable?

2. Socially sustainable events

The Green Event Ninjas sum this one up beautifully:

"Social sustainability is realised by equitably meeting the needs of all people affected by the planning or activation of an event."

I love this definition as it's so simple yet so impactful. As you start to break-down 'all people' it becomes so apparent of the vital role each of us plays in our world and the truly phenomenal impact we can each have. Events reach far and wide and we are the makers of magic.

You can look at this pillar through the lens of:

• Equity and inclusion

• Cultural diversity

• Creating healthy work/event spaces (think program here, not just food)

• Creating meaningful connections

• Leaving a positive legacy on the community where your meeting is being held

• Social well-being

3. Financially sustainability events

From an association perspective, this is front and centre every time we plan an event. For most associations, the financial impact of our large conferences and on-going events is what underpins the association's ability to perform activities that benefit members but don't generate revenue - advocacy being a prime function.

For events with a more corporate or leisure focus, the profitability of the event may not be a priority but other objectives are i.e. leads/sales generated, reward and recognition etc.

In broad terms, financial or economic sustainability is about being consciously aware of how you're using resources in a way that is responsible, good for business and considers the long-term impact.

This can include things like sourcing products from local first nations businesses or fair trade suppliers, impacts to the local economy where the event is being held, member or shareholder value and return on investment... to name a few.

If you'd like more information on this or to access future articles, forum discussions, interviews and more please visit me at www.businesseventsnetwork.com.au

The Business Events Network is a home for everyone involved in the amazing world that is business events.

Paula Rowntree ■

Paula is a passionate advocate for the power of business events to create long term social and economic impact. As a leader within the business event and association sectors, with more than 25 years' experience, she works with associations to successfully design, develop and implement business event strategies that enhance the member experience, adapt to changing environments and best practice, diversify revenue streams and increase the value of the organisation.

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Connecting Emotionally With Your Participants Pays Off:
Start Measuring Your ROE

We've all seen the feedback forms after running a successful event:

- "That was a great event; well-organised and interesting."
- "Made so many new connections!"
- "Learnt a lot from the speakers and experts – glad I joined."

On the surface, these are wonderful comments to receive from participants, but after organising and running the 47th International Symposium on _____ to the same glowing feedback, you might also find yourself thinking "so what?"

You're asking the right question. Based on why associations host events, generally speaking, you want to know:

- What does it mean for the way they now show up as members of your association?
- What decisions are they going to make differently that positively impacts their membership?
- What will change in their interaction with other members as a result of joining your event?

To truly influence business outcomes like the above, we believe an event must elicit an emotional response. That's why, together with our US-based partners The Community Factory, we set out last year to scientifically prove our theory on emotions.

We undertook a year-long study called Return On Emotion℠, designed to identify exactly which emotions need to be evoked in order to create an environment for business readiness.

Turns out, there are FIVE.

- **Hopeful**
- **Adventurous**
- **Active**
- **Accepted**
- **Motivated**

That's to say, carefully designing your association events around evoking these five emotions will drive membership revenue, member engagement and build meaningful connections among your members. The good news: the formula isn't just for events. If you are creating any type of marketing program targeted at your current and potential members, you can design, and then measure, it against this ROE formula to ensure you're hitting the mark.

So how do you measure the success of the program? It's a simple 5-question series to add into your post-event survey.

Using a 10-point scale, ask your participants how the experience made them feel on a set of the five core emotions and average the score.

- **From hopeless (0) to hopeful (10)**
- **From hesitant (0) to adventurous (10)**
- **From rejected (0) to accepted (10)**
- **From passive (0) to active (10)**
- **From uninspired (0) to motivated (10)**

Our research found that scores of 8.6 or greater meant that you're more likely to have successfully influenced membership decisions and engagement behaviours of your participants. Aggregately, this score will tell you if you created an environment for success. Individually (if your surveys are not anonymous), you'll know how to approach your participants in the future by what emotions they felt were lacking in the program.

These principles are a great way to avoid guessing how to design your next association event, and almost guaranteed to be a more rewarding experience for both you and your members.

Banu is co-founder and chief experience officer at uncommon conferences. She's a self-confessed "content and connection" junkie with over 17 years' global experience in marketing, communications and events. Armed with an Executive MBA, she designs and facilitates unique experiences that connect people, meaningfully and joyfully. Banu is grateful to live and work on the traditional lands of the Whadjuk people.

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Association Leaders

Experience Meaningful Engagement in the Northern Territory

Answers for Association's Association Leaders Retreat for 2022 was staged in mid-May at Uluru, in Australia's cultural heart. The Retreat was supported by Northern Territory Business Events, with the team providing invaluable contacts and information to ensure the program delivered an event with meaningful impact.

The Association Leaders Retreat (ALR) is held annually and is designed to provide like-minded association planners with three days of highly engaging sessions where they join in discussions on current issues and take the opportunity to network, whilst enjoying iconic landscapes and experiences.

The ALR is hosted by Answers for Associations which provides association professionals and industry experts with a forum to connect and discuss sector-related topics, share ideas and resources plus explore opportunities.

The Retreat has previously been staged in Alice Springs and Darwin in the Northern Territory.

A total of 33 delegates were in attendance at Uluru and encompassed a broad range of associations and not-for-profit organisations, along with other specialists from the associations sector.

Delegates were accommodated at the Sails in the Desert and Lost Camel Hotels which form part of the expansive Voyages Ayers Rock Resort complex.

Enriching NT culture plays its part

Conference sessions were held at the Voyages Ayers Rock Resort Conference Centre which is known as Uluru Meeting Place. The Tjungu Ballroom was the primary venue, the title 'Tjungu' aptly named by the local Anangu traditional owners to convey 'meeting together'. The venue's floor-to-ceiling glass windows ensured the stunning surrounding landscape provided an ideal backdrop to the event.

Expert Power sessions are a feature of the ALR and 2022 was no exception with more than 16 individual speakers presenting on a diverse range of highly relevant topics from strategic planning and governance to conducting a Knowledge Café.

Uluru-Kata Tjuta National Park is one of two dual World Heritage-Listed regions in the Northern Territory, the other being Kakadu National Park. The parks are listed with UNESCO for both their natural and also their cultural values, with the ancient Aboriginal culture in each location enabling enriching engagement for business event attendees.

Uluru delivers unique experiences

With Uluru home to so many iconic attractions and experiences, there were no shortage of options for the Retreat social program.

On the first evening, attendees were taken to a private outdoor area to enjoy an exclusive staging of the award-winning Sounds of Silence Dinner, an evening of superb dining under a twinkling outback sky. The three-course dinner included a didgeridoo performance and a presentation by the resident 'star-talker', who decoded the many features of the southern night sky.

Day Two saw a number of Retreat attendees rise extra early in order to experience a bucket-list sunrise breakfast tour, watching Uluru bathed in the ever-changing early morning light.

In the afternoon, sessions wrapped up a little

earlier to enable attendees to visit the Uluru Camel Farm where they took a leisurely camel ride across the desert, providing a truly unique way to view a desert sunset and survey the landscape dominated by the massive Uluru.

The Camel Farm was also the venue for a Sunset BBQ Dinner, the extensive outdoor terrace showcasing another impressive Uluru dining location.

After dinner, the group took a walk through the spectacular 'Field of Light' installation, which encompasses 50,000 glowing glass spheres placed in the desert sands and powered by solar energy, with Uluru as the backdrop and a brilliant night sky blanketed with stars.

Association professionals feel inspired

"The Retreat at Uluru was not only enjoyable but also inspirational and I think the destination provides great scope for any type of association gathering. In terms of facilities, there's everything that could be required along with the opportunity to have truly unique experiences like watching a desert sunrise, the Sounds of Silence Dinner, Field of Light and the Camel Farm experience. Uluru exceeded my expectations as local tourism operators, event services and local businesses worked together to bring together a seamless experience for our group. You can see why it's regarded as one of Australia's most iconic destinations." **Leigh-anne Shannon, Chief Executive Officer, Internal Medicine Society of Australia and New Zealand Ltd.**

"This was my first time attending Uluru for a business event, and it was magical. The opportunity to connect with association delegates, develop new relationships and discuss challenges in such a spiritual location added a layer of value that I had not anticipated. The diversity of experiences outside the conference facilities made the connections so special and memorable well beyond the three days we were there." **Deanna Varga, CEO & Founder, Mayvin Global; Adjunct Associate Professor, UTS.**

From an organiser's perspective

"Staging the Association Leaders Retreat at Uluru this year provided an opportunity for us to showcase one of Australia's most iconic destinations, whilst providing our delegates with invaluable business and cultural insights. Feedback received on the sessions and the Retreat activities has been overwhelmingly positive, with the meeting venue and meaningful local experiences combining to deliver a truly memorable event for all involved." **Angela Shelton, CEO, Answers for Associations.**

Michelle Graf ■

Michelle Graf is the Bidding and Government Relations Manager with Northern Territory Business Events (NTBE), the official convention bureau for the Northern Territory. Michelle has been with NTBE for eight years and is responsible for developing and implementing international bidding activities that position the Northern Territory as a competitive, distinctive and meaningful destination to stage globally focused Business Events as well as administering the Northern Territory Business Event Support Fund.

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Global Disruptors
- What Can They Teach Us About Events?

Remember when Airbnb came along and everyone was wondering why you would choose to stay in a regular house rather than a hotel?

How about Apple's iPod? It wasn't the first MP3 player to the market, but it was the first to hold 1,000+ songs and introduced the world to music 'streaming'.

What about Netflix? A disruptor from the very beginning, they have revolutionised the way people consume television content more than once.

Each came from humble beginnings but share key philosophies making them leaders in innovation. It's transformative companies like these that may provide inspiration for your own events. Take advantage of continuous change post-pandemic and refresh your offerings with the customer experience at the forefront.

These are my three fundamental lessons from innovation leaders that can underpin association event strategies:

Lesson 1: Provide a human experience

Airbnb shook the hotel industry by addressing the needs of both the guests and their hosts. By personalising profiles and connecting guests to hosts who live in those destinations, it offered a truly unique, local flavour – with a focus on the experience!

Similarly, associations can use design thinking to map out personas of each stakeholder attending their events: first time delegates, non-members, sponsors etc. By clearly identifying and articulating the needs of each of these groups, you can design initiatives to ensure that these participants have a memorable conference experience.

An international education conference used this methodology and uncovered that newcomers found it daunting to network at their events, given that the other attendees were largely familiar with each other. To combat this hesitation, organisers introduced a simple initiative that allowed attendees to personalise their badges. Participants customised their lanyards with fun conversation-starter stickers, such as country or interests. This cost-effective idea allowed first-time and veteran attendees alike to network easily.

Lesson 2: Purpose before product

Apple gave us the iPod – compact enough to fit into your pocket, but versatile enough to hold the songs you needed. Apple's strategy has always been to start with the customer experience and work backwards. They continually ask, 'What do our customers really want? What journey can we take them on?' Then they sit down to work out how to create the technology.

At the heart of your event strategy, you should be asking, "Why are we doing this?" and "How does this align with our mission?". Often when associations look inward with this critical mindset, the answers require us to rethink the traditional way that conferences have been run. When we find gaps that are underserved, we uncover an opportunity to evolve and innovate.

Before launching an inaugural energy conference in a crowded market, one association undertook extensive, in-depth market assessment in the sector. Its findings identified a proliferation of commercial conferences, which saw content being driven by sponsorship investment and largely labelled as "talk fests". This paved the way to design a "For the industry, by the industry" conference that featured strong educational content and a mix of delivery formats. By design, the engaging and interactive discussion was largely what drove strong event attendance – rivalling competing conferences with many more years in market.

Lesson 3: The power of data

Netflix's business model – from DVD rentals to streaming services on subscription – has been centralised on personalising the user experience. Big data plays a central role by analysing consumer behaviours and using AI to suggest content relevant to individuals.

Much like Netflix, associations gather an enormous amount of data. The introduction of digital offerings, such as webinars and virtual conferences, has provided a significant amount of information as to what their community wants. But how many associations review this data in-depth and take action from it?

A regional medical association analysed extensive data from webinars participants during and post-pandemic. Extracting valuable information about demographics, engaging content and topics, plus digital marketing metrics, saw them launch a hugely successful corporate partnership strategy. Their biennial flagship event was still central to their sponsorship offering, but detailed reporting on, and packaging of, additional engagement opportunities highlighted real return on investment for industry year-round – thus providing incentive to inject a greater investment.

Airbnb, Apple and Netflix created products or services to satisfy a gap in the market and created a solution to improve the human experience. We're not saying you need to come up with the next revolution in conferences. Just take a hard look at your events and ask yourself one question "Are we doing everything we can to best serve our community?". Chances are, if you're doing the same thing you've always done, the answer is no. People change. Industries grow. Professions are constantly evolving and becoming more sophisticated. So how do you ensure you are designing engaging event experiences?

Cindy-Lee is the Director - Associations Solutions at MCI Australia. She leverages her operational event and association management experience in a business development and consulting role at MCI to ensure optimised engagement and maximising revenue generating opportunities for associations.

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Have Venue Hire Agreements
Evolved?

Whether your association holds periodic, professional development sessions, social or networking events, or full-sized annual conferences, the biggest expense is usually the venue-hire agreement.

Venue-hire agreements are also the most onerous.

Have venue-hire agreements evolved in recent times?

Over the past few (COVID-19) years, venue-hire contracts have evolved a little, to take account of the pandemic. Sadly, the evolution has been inconsistent and many venues haven't changed their terms of hire at all. Often, change for the better has occurred only when the venue is told that its clause is a "deal-breaker".

Some venues have introduced specific clauses dealing with the consequences of COVID-19. Again, they differ dramatically from venue to venue. Many are one-sided and do not allow the hirer to postpone or cancel without penalty, if participants cannot attend because of travel restrictions and lock-downs.

I have negotiated with many venues on the subject of their Force Majeure and COVID-19 clauses, and I'm heartened to say that most of the time I have been able to achieve reasonable outcomes...

Beware - There are other harsh provisions

One important area where venue-hire agreements have not evolved at all, is their often-times ludicrously harsh liability regimes. I have seen a great number of venue-hire agreements and there has been no improvement in these harsh provisions that have been plaguing the events sector since time began.

The biggest culprit is the indemnity. An indemnity is a clause that requires the hirer to pay (or cover) all losses incurred by the venue during the event. Indemnities are not always sign-posted and some do not even use the word "indemnity". Many clauses operate as de facto indemnities.

Indemnities expose you to a much greater quantum of liability because the usual rules governing compensation do not apply.

Worse, is the fact that the hirer's insurance policies will almost never provide cover for such liability. Almost all policies of insurance expressly exclude cover for "assumed contractual liability" and an indemnity is just such a thing.

Worse still, is that the indemnities almost always require you to pay the venue not just for losses that you may cause, but also losses that are caused by others, whom you do not control, such as delegates, sponsors, exhibitors, and other suppliers.

Ordinarily, you would not be liable for the negligence of independent third parties. Again, your insurance won't help because it covers you for liability from what you do or fail to do – not what others may do.

Think about that for a moment. One of your delegates knocks over a candle and the venue burns down. Ordinarily you would not be liable, but under the indemnity you are – and your insurance will not come to the rescue!

In such clauses, the venue is effectively asking you to provide a private insurance policy, where you have no back-up cover of your own...

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Some venues (but by no means all) will negotiate with you if you or your lawyer seeks removal of such clauses –but many will not: I hear the response "No changes are permitted, it is our standard contract", all too often.

There are some measures you can take to mitigate the risks of venue indemnities – in your contracts with delegates, sponsors, exhibitors, and other suppliers – but the fundamental problem remains: You can be left "holding the bag".

There are many other clauses that are problematic in venue-hire agreements, but I focus on indemnities, as they can cause you a catastrophic liability.

Other problem-clauses include unreasonable cancellation clauses, costly TOD (technician on duty) fees and (absurd) unilateral rights for the venue operator to move your event to a different part of the venue –or even a different venue!

So common are indemnities and these other harsh clauses (in venue-hire agreements) that it is always prudent to have them reviewed. Whether you are managing your events in-house, or out-sourcing to an event manager, budget for a review by your (or your event manager's) trusted events-specialist lawyer. It doesn't have to cost sheep-stations and the downside, if you get caught out, can be much, much worse...

Finally, ensure that you or your event manager obtains a copy of the venue-hire agreement as early as possible, ideally, before you have committed to a budget and before your heart is set on that venue.

Be prepared to negotiate and, if necessary, to walk away if the venue does not "play ball" but do that early! As the event draws nearer, you lose bargaining power and you may not have time to find an alternate venue if your preferred venue digs its heels in and refuses to amend its harsh terms.

Matt is the principal at Matt Crouch Legal. He is a specialist events lawyer, teacher, author, and presenter, who's assisted associations and event managers with their events for over 30 years.

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Matt Crouch ■

Leveraging Education Programs to Build Value Across Your Association

As the world of work continues to evolve, professional associations are presented with an opportunity to evolve their business models and lead their professions through change. Hard to argue with this! But how do we, as professional associations, manage this change whilst ensuring we continue to support our members, and also build new revenue streams?

The Institute of Public Works Engineering Australasia (IPWEA) has elevated education in its strategic focus over the last two years, leveraging its education programs to meet member needs, while helping to address the skills shortage for infrastructure asset management professionals in Australia, New Zealand and internationally.

The IPWEA Asset Management Pathway, launched in 2021, directly addresses an international shortage of qualified infrastructure asset management professionals. Comprising online courses at three levels (Foundation, Build, Recognise), the Pathway offers long-term skills and knowledge growth to the profession, focusing on the 'what is asset management' as well as the 'how to do asset management'.

The Pathway links to an international certification process, enabling participants to leverage the courses undertaken to work towards certification as a qualified Asset Manager, in addition to achieving a micro-credential from IPWEA.

The impact of building the Pathway has been significant. Revenue from education programs has increased 50 per cent year on year for the past two years. International enrolments also continue to increase.

These are great outcomes, but the creation of a world-class development pathway has also impacted other areas of our organisation, leading to increased value for members and stakeholders:

- **Publications:** IPWEA's suite of technical publications and eBook Library are gaining traction in many new organisations as a result of Pathway course participants becoming familiar with the publications during their courses.

- **Tools and Platforms:** IPWEA's NAMS+ toolkit, which enables the modelling and presenting of asset data has gained significant additional subscribers due to our Pathway courses exposing participants to the tool.

- **Community:** Micro-credentialed short courses offer a digital badge which can be shared online via social platforms such as LinkedIn. At the completion of each course, LinkedIn is awash with our participants celebrating their achievement, which in turn offer significant promotional value across the profession.

- **Advocacy:** The increased participant flow through the Pathway courses has greatly increased IPWEA's influence on the asset management profession. The increased volume of participants has helped cement IPWEA's advocacy position to all levels of Government, as it is these decision makers that are observing the positive outcomes of our courses within their own organisations.
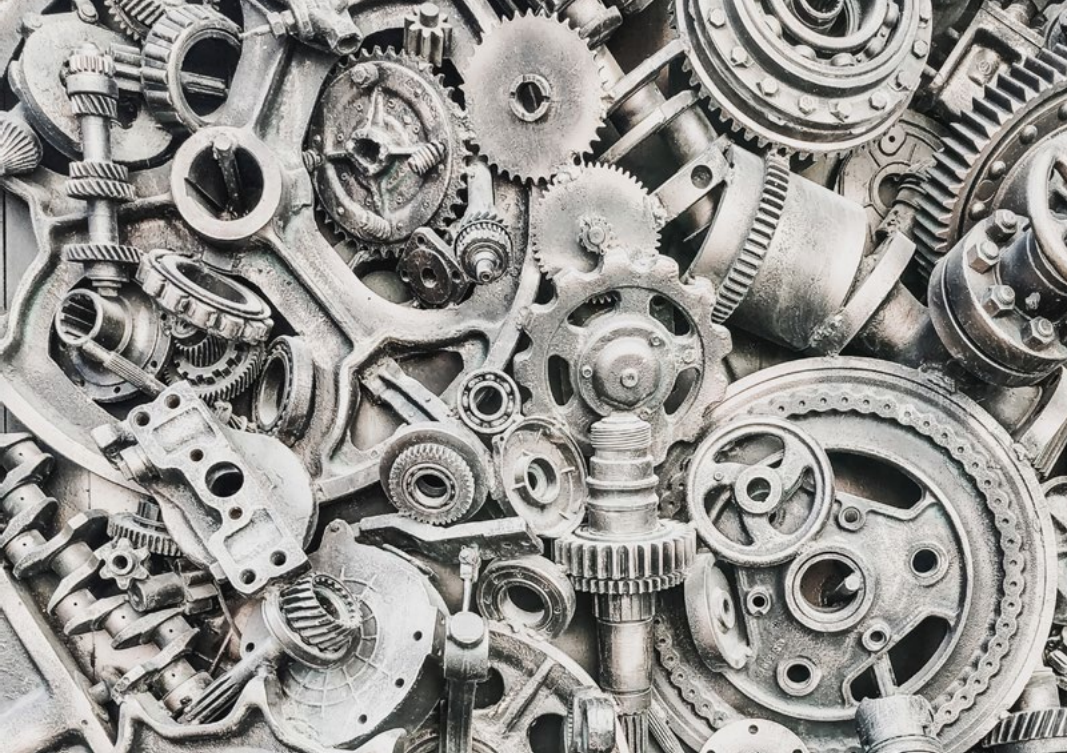
As the professions we represent and support continue to evolve, so too must our organisations. Supporting the professional development of our members and the professions that we represent is a key component to the value of professional associations.

With many professions facing change at a rate perhaps not previously witnessed, our organisations have to adapt to meet the current and future needs of our stakeholders. Education is an important component of our associations business models, whether this be through Australian Qualifications Framework aligned courses, micro-credentials, or general training programs. By strategically prioritising education, significant advantage can be gained across your association's offerings, while at the same time ensuring revenue streams to sustain your organisation into the future.

Jonathan's experience spans two decades in adult education and learning and development across the finance, not-for-profit and education sectors, working for organisations such as Commonwealth Bank, Australian Graduate School of Management (AGSM@UNSW Sydney) Sydney School of Entrepreneurship and Mission Australia. Prior to this, Jonathan worked as a corporate recruiter. Currently Head of Education at the Institute of Public Works Engineering Australasia, he has spent his career designing and implementing a wide range of initiatives to enhance employee and student learning and organisational improvement.

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Why Social Learning Matters.
Or, Why Most Webinars Suck

Ah webinars! Notifications of these learning opportunities tumble into our email inbox every day. Some sound interesting. Some even sound useful.

But we delete almost all of these notifications because we know what the format will be like; a host and perhaps a small panel of speakers will chat for 30 minutes to an hour, and there will be the always strained ritual of questions taken from the floor, delivered as text entries in a benighted Zoom call.

Even if we do decide to tune in, because we are off–camera and off–microphone, we will often be simultaneously answering emails, making dinner or having conversations with others. This is because our attention is naturally proportional to our sense of presence in a learning environment.

The result is we don't end up learning much at all from this format. It's stopped being a useful approach to learning, and while this is mostly platform-related, it also is because webinar formats have been reduced to text-based chat interaction.

So, the reason why most webinars suck is because hosts have chosen the wrong platform, and they have not thought about how people really learn.

Platform choice

The reason why associations host webinars on virtual conferencing platforms is straightforward. It's because they've paid for a subscription to a platform, and webinars are a way of capitalising on the existing subscription service.

This is possibly the worst reason to host a webinar on any meeting platform. Instead of thinking about how target audiences engage, and how better to problem solve together, organisations are broadcasting messages to audiences because they have a subscription.

It sucks both from an organisational perspective and from a learner perspective because it is deploying the "empty vessel" learning philosophy. That is, organisations are blasting out messages to their members or prospective audiences, filling up those empty minds with knowledge and then patting themselves on the head for a job well done. That's both patronising and unproductive.

They might as well have recorded a panel session and streamed it on YouTube, Facebook, or LinkedIn Video. At least with that approach, there would have been fewer connection issues and while maintaining the kind of engagement from live chat on any of those other platforms. **(If associations must deliver content in this fashion, I strongly recommend the pre-recorded panel session and live Q&A on a streaming platform. It's just more professional than the awkwardness of virtual conferencing meetings.)**

More effective are platforms that allow for real-time collaboration around documents and prototyping. These exist for remote collaboration, but ideally, it is better to create contexts for real life engagement which involve members or delegates in learning and problem-solving activities. And, if real time, face-to-face meetings are not possible, then hybrid solutions involving platforms which allow participants to share their ideas and their work on creative and collaborative canvases is preferable to webinar-style broadcasting.

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Learning together

There's a reason why school students suffered during the pandemic's lockdowns. And it wasn't because the teachers were luddites. Indeed, teachers in primary and secondary education have often been early adopters of emerging technologies in the classroom.

It was the social aspects of learning which were the most difficult to mimic with virtual conferencing platforms. As such, learning progression was much harder to maintain during lockdowns, because that social dimension was so limited.

As humans we are social animals, and social interaction is necessary for higher levels of learning. Anyone who has ever spent time with Bloom's Taxonomy will know that learning is not just a matter of remembering things. It requires interpretation, analysis, synthesis and even bargaining. Basic learning acquisition may be possible through reading and remote access to resources and limited engagement. But higher levels of learning are best achieved through critical assessment and interaction with others.

So learning is social. Even as adults, we get a better sense of our understanding when we learn together. In his work on Gamer Theory, Mackenzie Wark demonstrated that in measuring ourselves against one another, humans create a collective understanding of one another and contribute to collective intelligence.

As we gradually shift beyond the remote working and engagement that characterised the pandemic, learning programs should again consider how best to facilitate social learning and the opportunities to generate this collective understanding and intelligence.

Embrace interaction for the best learning

Social learning matters because decisions are made by and for people. It matters because understanding comes from negotiation and debate, not from rote memory recall. And it matters because in associations, we gain value from what we achieve together.

As a technologist, I am certainly not suggesting that you cannot or should not use technologies for learning. Instead, I'm recommending that associations move beyond the traditional, low-interaction webinar as the default learning experience.

There are so many other ways to learn. Real time collaboration and problem solving in groups and peer-to-peer mentoring and learning can be conducted both in person or online. Experiential learning is mostly face-to-face, although increasingly immersive learning through games (with the participation of others) is a highly effective and memorable learning experience. And the metaverse promises to create new levels of social interaction through digital channels.

But whether you settle for social engagement through real life meetings or mix it up with hybrid learning using various technology solutions, embrace opportunities to present, to interact and to continuously improve. Then, no matter what your association's goals, you will have created value for your membership.

Joanne Jacobs ■

Joanne Jacobs is digital strategist and Co-CEO of innovation consultancy, Disruptors Co. She mentors startups, provides expert commentary and has worked extensively in academia.

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A Learning-Integrated Life – How Data, Skills, and Artful Design Support Hybrid Work

The art of life is a constant readjustment to our surroundings. — Kakuzo Okakaura, 19ᵗʰ century Japanese art and cultural critic.

We now accept the fact that learning is a lifelong process of keeping abreast of change. And the most pressing task is to teach people how to learn — Peter Drucker.

The world is increasingly digital. We need engagement and learning that supports members to succeed by preparing them for a digital future. I believe that truly authentic learning is steeped in the art of blending effective design, strong pedagogical foundations and deep motivation and engagement. — **Liz Johnson, Deputy Vice Chancellor, Deakin University.**

Remember to breathe....

A lot has been written about what Covid-19 has "taught us". So many lessons we were supposed to have learned, so much time spent away from colleagues, friends and loved ones. For many, these "lost years" have been a time for reflection on where, how and why they work and what a productive and happy life means for them.

For businesses and the broader economy, the onslaught of hybrid work, the imminent tsunami of automation, sluggish workforce development and failing productivity growth sees organisations seemingly beset with challenges and existential threats.

Twenty-four-hour news cycles and pundits tell us that change today is culturally difficult, business disruption is fraught, and the future is uncertain. But hasn't that always been the case? The difference this time has been the unrelenting velocity and ferocity of winds that have buffered us.

Interestingly, my conversations with optimistic business leaders over the last four months tell me there is a break in the weather. I would argue that the pendulum has begun to swing back and that we have before us a unique mix of wicked problems, potent technology, growing collaboration and more optimistic policy settings. And I believe that the necessary fuel to drive change, our collective creativity, curiosity and compassion is better recognised.

This article explores how a carefully mixed amalgam of science, practicality and artful design be a power for positive change. Given the fluid nature of work and professional journeys, I will take a certain liberty in blurring the distinction between learners, members, and employees.

Let's start with science.

FROM DISRUPTION		TO INNOVATION
Complex, dated, underwhelming content and experiences	→	Access personalised learning experiences driving development anytime, anywhere, and on any device
Stale, disparate reports that lack insight for decision making	→	Act on strategic insights and data to evaluate ROI and deliver on long term business goals
Manual, slow, dated process that require huge time investments and resources	→	Analyse Impact. Easily create, manage, and report on learning effectiveness and ROI

If data is the answer…. what was the question?

In March 2022, The Australian newspaper published an article I have penned, exploring the idea that data is the key to getting workplace culture right. In strategic planning the challenge is twofold, asking the critical business-centric questions and then leveraging the right data to build actionable, evidence-based strategies.

I wrote that "The expectation of how we will work post-pandemic has now been set …defined by flexibility and meeting the needs of employees in every industry." Property Council of Australian data exposes uneven occupancy and space utilization rates across the country, an experience that aligns with the challenges of many leaders who struggle to recalibrate work as a hybrid experience.

And the rise of hybrid work has exposed the incompleteness of historical business and performance data in mitigating risk and levering opportunity. The accepted "science" no longer seemed fit for purpose.

Over the last two years, our clients leveraged over 130 rich data sets and visualisations to mitigate uneven performance and plan for growth in hybrid teams. Those same optimistic leaders were bullish because they had the right data and simple access. Less optimistic leaders who typically relied on more traditional HR, financial and business intelligence platforms saw only a small piece of the member or employees' journey, capabilities and value to the business.

So data is not and has never been the answer to any worthwhile question. It is however one of the most potent enablers to better understanding, authentically engaging and effectively supporting members and employees.

This leads us to some practical considerations.

It's jobs, skills, and learning.

If there is a word that best encapsulates the current mood, focus and vision for Australia, both domestically and internationally it is "reset". In this spirit I want to encourage a reset of our understanding of "learning".

As a teacher I came to understand the difference between education as a framework and learning as a journey. I also came to understand the potency of agency when learners took ownership of their journey. The primary school is a practical lab in which concepts and deeper learning, skills and competencies all come together.

I suggest that the current nomenclature of "jobs skills and training" needs a reset to "learning, skills, jobs and trust." If, like me, you are sustaining or growing teams then you know that the short game is about viability, skilled candidates and filling workforce needs. However, the longer game involves innovation, resilience and knowledge-enablement so effective skills mapping, personalised learning and trusted learning warrants are needed to truly lift productivity. Both games are founded on trust: that candidates have the skills, attitudes and habits needed and the employees provide the right culture and environment (clarity of roles and required skills).

A Learning-Integrated Life – **How Data, Skills, and Artful Design Support Hybrid Work**

The idea of "trust" is critical in the context of an education value chain, it underpins notions of value, reward, and agency. Consider the following.

- Learners, as consumers of educational products, ask: What is the value of this certificate, credential, or degree in the future world of work? What do I do when my more formal awards are not enough to meet my life and work goals?

- Employers, as consumers of a skilled, productive workforce, ask: What is the value of this certificate, credential, or degree to my business? What is the value of an employee to my business and what further learning will it take to make them productive?

I would argue that a broader reassessment of the fit and role of Competency-Based Education (CBE) models is worth exploring. Co-creation of competencies and outcomes is where the model starts; it is an intentional and transparent approach to mapping development needs, assessment design and content strategies. CBE precisely aligns with programmatic outcomes and most importantly, it gives choice and control to learners to better align life, educational and career and work goals.

Additionally, CBE offers organisations and their members the benefits of pivoting to a learner/member-centric model that recognises engagement and mastery of outcomes in terms of shared value and benefit. It also shows the benefits of unbundling services and products to a larger market and provides appropriate learner agency.

In practical terms this demands:

- core systems that integrate effectively and efficiently into the IT and business ecosystem

- cleaner, consolidated data flows that fuel a seamless member or employee-first experience

- trusted skills and learning warrants that are supported by employers, peak industry bodies and most importantly, the learner who consumes these programs and expects results.

If it doesn't do what it says on the tin, associations will never gain the necessary learner and employer buy-in.

And finally, to a little art...

Personalised learning where science meets art.

Working at D2L I can learn from our many partners; global and domestic associations, government, education and enterprise players that seek to transform learning and build workforce capacity.

These successful partners have come to see jobs skills and training through the lens of humanised learning. More and more they recognise that being a successful learning organisation is critical to being an effective business, department or enterprise.

D2L's own research, released in a 2022 whitepaper describes this eloquently as a "Learning-Integrated Life" where individuals are always in a learning mindset and intensive and episodic opportunities for learning are woven through the fabric of our lives, preparing us for successful careers and rich life experiences. This is the point at which we might address the notion of art.

WHAT THIS MEANS FOR EMPLOYEES/MEMBERS

- **Agency:** choice in pursuit of skills – what when and how learning occurs
- **Aspiration:** a clear achievable pathway for personal development and reward
- **Currency:** valued skills and capabilities with workplace and career relevance
- **Narrative:** insights into the broader development journey and connection to work/life balance
- **Value:** career impact, portability of digital certificate

WHAT THIS MEANS FOR EMPLOYERS/PEAK BODIES

- **Structure:** visibility of workforce skills gaps and areas of improvement
- **Access:** tech platforms, inclusive design of learning
- **Recognition:** evidence-based workforce development, distribution of talent
- **Culture:** engagement and continuous improvement, performance/reward based
- **Growth:** measurable business growth, track productivity, data informed policy.

Art is critical to rendering meaning and understanding in our world and I believe that it is the glue in a personal learning integrated life. At a basic level, the process of and elements central to learning or instructional design include the melding of pedagogical principles with multimedia and user experience and interface design. A well architected learning experience is informed by aesthetic judgements, nuance and creativity making content, assessment and activities come alive.

During a plenary session at a recent L&D conference, I was asked to summarise the value and meaning of CBE-based approaches at the macro level. I struggled a little until I tied "artistic" concepts such as agency, aspiration, narrative and value to processes, outcomes, and careers.

Art often sustains us in our day-to-day activities, bringing perspectives and insights previously unseen in our journey.

We have an unprecedented opportunity to gain actionable insights into employee performance, and to personalise learning journeys aligned to business priorities.

Every organisation is on their unique journey from disruption to innovation. I've seen how good businesses accelerate their growth by looking at the application of data, practical processes, and art/creativity through fresh eyes.

Peak bodies such as associations can make a unique contribution to the sustainability and growth of their stakeholders, helping to guide learners and employers, so that each can proactively benefit from our recent learnings and contribute to a more productive and creative future.

Tony Maguire ■

Tony has more than 25 years' executive experience, from start-ups through to Fortune 500 companies including Apple and Oracle and insights through collaborations with internationally-recognised educators, government and industry leaders.
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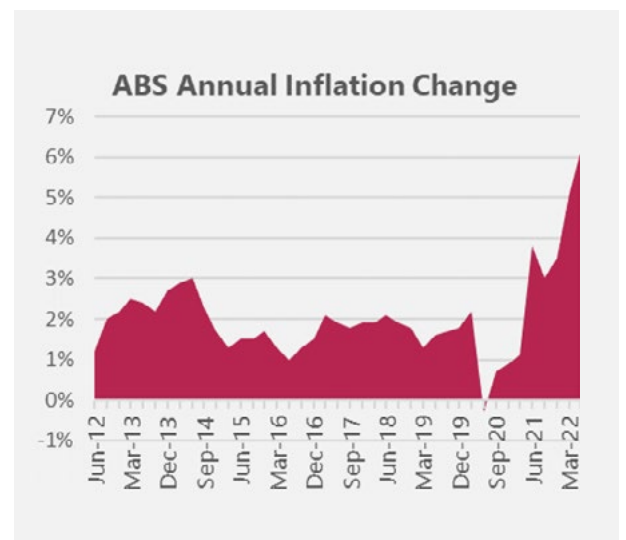
Talent
On the Front Line

At the start of the year the buzzwords that echoed around the world were "the great resignation". This trend from the US didn't quite hit Australian shores in the way it was initially slated to.

Instead we have observed a steady increase in several macro environmental factors impacting both talent retention and attraction.

- **Inflation:** Australia has been experiencing record levels of inflation with the annual rate reaching 6.1 per cent as at June 2022 – the fastest annual increase in 21 years. The federal government and Reserve Bank have forecast that inflation will peak at 7.75 per cent in the December quarter of 2022.

- **Wage Stagnation:** Inflation has far outstripped wage growth exacerbating the tension felt by employers and employees alike.

- **Job Mobility:** ABS cites that job mobility levels are the highest recorded since 2012. Wage stagnation has contributed to job mobility being the most effective avenue for a worker to achieve material salary increases.

None of these trends are shocking or new, given they've dominated news headlines. What's critical to understand though, is how these trends are manifesting as critical risks within your organisation and how to address them.

* Source Australian Bureau of Statistics

ABS Annual Inflation Change

Proactive talent retention and attraction strategies:

1. Benchmark salaries within your sector to understand what your staff may be offered elsewhere and how your salaries compare.

a) Given the current economic state, it's important that salaries are relatively benchmarked and not materially out of step.

b) However, the answer or lever to pull isn't always money. There are many factors which make up the strength of engagement and improve talent retention.

c) These can include training and development, career progression opportunities, culture, organisation values, flexibility and trust, wellbeing, leadership and employee benefits to name a few.

d) These seemingly intangible elements can be quantified in a comprehensive culture/staff engagement survey.

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2. Review your Employee Value Proposition (EVP) and Employee Brand, both are essential to talent retention and attraction.

a) EVP is internally focused: it is the promise an organisation makes to its employees, defining what you will give in return for their dedication and talent.

b) Employee Brand is externally focused: it's the value proposition that you market externally to potential candidates.

c) These two should align. Your EVP needs to deliver on the promises made in your employer branding. Otherwise people will lose trust in your organisation and your brand reputation will suffer.

3. Consider your most "essential" talent, those that will create a significant hole if they were to leave tomorrow.

a) Oftentimes the true value of a talent isn't realised until the person has left.

b) The cost and time involved in securing a replacement can far outstrip paying the original staff member what they're truly worth to the organisation.

Seventy-five per cent of non-profits recently identified talent attraction and retention as a key challenge*. It's worth investing the time to get this right proactively, because scrambling for good talent in a time of talent shortage is a difficult prospect none of us are keen to face.

Summary:

Having advised hundreds of associations and other non-profits on their remuneration, we find that there's often already a gut feel about whether the salary is out of step with the market. It's important to be armed with the right market relativity information to quantify the materiality of turnover risks particularly for staff members who are essential to the organisation.

Given organisation pressures, it's not always feasible or prudent to increase salaries. Running a staff engagement survey is a great way of understanding the strength of staff connection to the organisation, team and role. This can support quantification of turnover risk as well as highlight areas of strength and optimisation opportunities.

Finally, consider both your employee value proposition and employee brand. Be clear about what your values are and how you want employees to feel while working at your organisation. This can be a powerful tool for both attraction and ongoing retention.

J Smith AM ■

Since founding Enterprise Care in 1988, Damien has worked with thousands of Boards, CEOs, and Executives. His focus is on long-term practical, effective and impactful stakeholder solutions. Damien's portfolio continues to include multiple Board Chair and Board Committee roles, Deakin University MBA course presenter, author, conference speaker and guest presenter/ facilitator.

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Helping Your People
Embrace Change

One of the biggest challenges for association leaders at present is finding ways to help their people embrace change instead of pushing against it. In today's business environment, change is not just constant, it is rapid and relentless, impacting strategy, member value and how we do business.

In addition, after two years of pandemic and with rising living costs and economic uncertainty, change has a huge impact on the human side of business, not just in terms of performance and productivity, but in health and wellbeing.

Most people resist change because it seems too big, too hard, and too overwhelming, but change is achievable one small doable step at a time. Thrust a new strategy upon your team or ask them to change everything they do, and they will get paralysed by the pressure.

But what if you help your people see change as a series of small doable steps, and give them an achievable process to act on it daily?

Change is a game of inches

Over the years I've had the opportunity of interviewing hundreds of successful leaders and one of the things that stands out is they understand the value of doing the little things. More importantly they understand the value of helping their people focus on doing the little things. Because it's the little things you do that make the biggest difference.

Yes, it's the leader's role in uncertain and rapidly changing times to develop the right strategy, to have a long-term vision with short term flexibility (that's another conversation for another time). But strategy needs to be implemented and it's the actions of your people that bring strategy to life. Step by step, inch by inch. If there was a silver bullet to embracing change this is as close as you are going to get, because it is small steps that give people back a sense of control, creates momentum and boosts confidence. Especially when people are tired and change fatigued.

Like most things simplicity is key and there are three key areas to focus on to help embed a game of inches philosophy to embracing change.

1. See change differently.

There is a myth out there that to navigate disruptive times, or to get your business or career to the next level that you need to reinvent everything. That somehow you have to completely change everything you do. And that simply isn't true. In fact, it's hard, scary and leads to change "overwhelm". But what if you help your people shift their thinking from seeing change as something they can't control or do anything about, to focusing on the things they can control. And not big unachievable things but small doable things.

2. Be a gap hunter, not an idea hunter.

Gaps are problems or opportunities that if addressed, pay big dividends. It's easy when times are uncertain to get caught up in new ideas, however, ideas are worthless unless they address a gap. And it's the little, overlooked gaps, that make the biggest difference. Therefore, it's important to give your people permission to find gaps and act on them. Not big gaps but small ones that are aligned with your change initiatives and strategy. Gaps in what they do and how they do it, like improving or deleting processes, or working on their professional development. Your people who are at the coal face of your organisation, help them become gap hunters.

3. Ownership Vs Buy in.

If your team doesn't take ownership of change, they will fight it all the way. In business we hear much talk of getting people to 'buy-in' to such things as change programs, but the challenge is that 'buy-in' can be forced upon people. When people are forced to 'buy-in' to doing something they will never embrace it. 'Ownership' on the other hand, is where people will act on change not because they have to, but because they want to, because they see what's in it for them. They understand the opportunities and benefits acting on change creates. So it's ownership we're after because when leaders can help their people take ownership of change, they will start to embrace change. Listen actively to your people's needs and concerns about change, ask for their input and views, and keep communication open.

Yes, the business world is rapidly changing and it isn't likely to slow down any time soon, mind you it never has. And although change brings challenges, it also brings opportunities for associations. One of those opportunities for leaders is to help their people embrace change, which in turn has a flow on effect to people and performance.

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The Work Ecology Triangle:
Key to Strategic Development

As managers, we have come to think of necessary workplace skills as either hard or soft. Rethinking — and abandonment — of this outdated practice is necessary to move the workplace into the 21st century.

Traditionally, respected management thinkers, like Andrew DuBrin, in his Essentials of Management, defined hard skills, also called technical skills, as those relating to a particular task or situation. These operational skills involve both understanding and proficiency in a specific activity that address methods, processes, procedures, or techniques. These are also skills that can be, or have been, tested and may entail some professional, technical, or academic qualification. Easily quantifiable, these are unlike soft or human skills, which are related to personal behaviour.

Unfortunately, common definitions of soft skills encompass abilities largely associated with emotional intelligence, but are far too often independent of acquired knowledge. This definition is often followed by examples that include a positive or flexible attitude, or the manner in which an individual relates to others. Often, soft, or human skills are categorised as people or interpersonal skills, lacking quantifiable measurement. Indeed, testing has occurred mostly in the social sciences rather than in business schools. Hogwash! These human skills require both knowledge and years of practice. Let's put an end to this old-fashioned thinking.

Moreover, individuals in the 21st century require three sets of critical skills: operational, human, and digital, all of which require continuous learning, inquiry, and significant practice to be viable for both the individual and the organisation.

In this new 21st century work ecology, this third set of necessary skills cannot be underestimated. The technological advances that both disrupt and enhance the fundamentals necessary for successful employment and organisational sustainability require separating these digital skills from operational and human skill sets. Together, these three components of workplace behaviour are not hard or soft, they are necessary, interdependent, and can be respectfully measured.
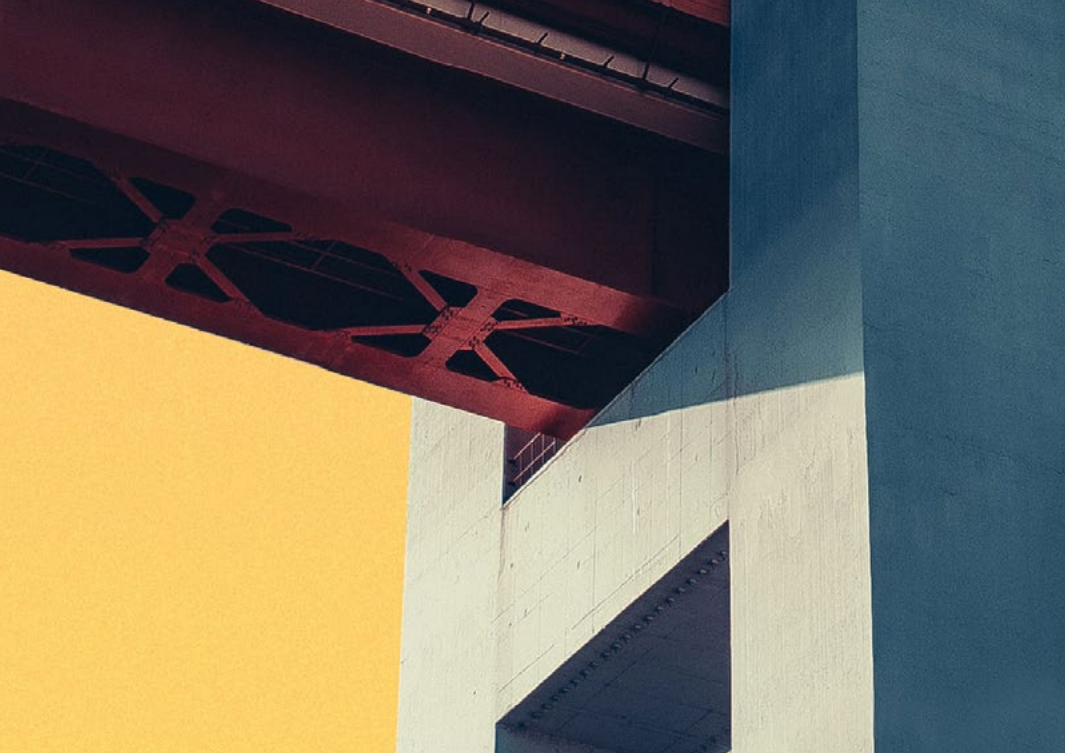
The triangle below illustrates the three sides of strategic success.

Work Ecology Triangle

Let's look at each of these skill categories. And be sure to note — the foundation of the three skill sets is the human skills component.

Human skills

These involve a command of practice and fluency, as well as a set of abilities that permit interpersonal understanding and communication. These include:

- **Collaboration** – Ability to play well with others and succeed in a team environment.

- **Autonomy** – Confidence to operate independently when appropriate; trust in self and organisation.

- **Communication** – Command of the organisational narrative, orally and in written form.

- **Creativity** – Innovative approach to work; a curious attitude, and hunger for learning.

- **Embrace of change** – Innovation, adaptability, flexibility, foresight.

- **Emotional intelligence** – Empathy, social sensitivity.

- **Leadership judgement** – Sound sense of when to lead and when to follow.

- **Motivation** – Energetic work ethic.

It is wrong to think of these skills as not requiring learning and academic rigour. To be competent in human skills one must engage in considerable reading, research, reflection, and practice. All components of academic rigour.

Certainly, they carry emotional overtones and can be difficult to measure. However, everyone knows when an individual possesses these skills and when they are absent. This is foundational, since all operational and digital skill capabilities cannot overcome the failure to act and interact in a human context.

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The Work Ecology Triangle:
Key to Strategic Development

Operational skills

This set of skills involves fundamental understanding, practice, and ability to engage in specific functions. These broad operational areas include:

- **Administration** – Organisational tactics that keep the institution in working order.

- **Data analysis** – Ability to detect patterns, integrating observations into daily operations.

- **Financial fluency** – Acting on sound tenets of accounting, budget preparation. Absorbing financials, evaluating proposals, making appropriate judgments with fiscal stewardship in mind.

- **General management** – Ability to see actions in context and practice foresight, sensitive to the difference of tactics and strategy. Talent for negotiation, conflict resolution, planning.

- **Re-engineering** – Evaluation and redesign of organisational processes.

- **Reporting** – Adept at collecting and organising information in a logical, concise manner that demonstrates status of operations.

- **Time management** – Prioritising to increase effectiveness and productivity.

- **Written expression** – Ability to craft concepts into words in a form that propels the desired message.

In the new ecology and culture of work and organisational fitness, we cannot avoid delineating a third set of proficiencies — that of digital skills — rather than lumping them into the old paradigm of hard and soft.

Digital skills

These represent the aptitude of the individual and an organisation to use technology. They include not only existing technological options, but an understanding that technological advances and disruption are ongoing, are welcome, and will require continuous upgrading. Organisations must invest in their employees by enhancing these skills as demanded by advances in technology. These include:

- AI fluency - General understanding of business and social implications of AI, machine learning and other technologies, and perception of the organisation's capacity to use them.

- Computer skills beyond the basics - Facility with email clients, search engines, spreadsheets and presentations. Awareness of basic security, backup, and privacy concerns, and a comfort level within an online environment.

- Digital etiquette and media fluency - Ability to understand, create, evaluate, select and employ technology systems to access, analyse, and communicate messages across a spectrum of platforms and formats.

- Document creation and information fluency - Ability to apply critical thinking, tools, and systems to address challenges at multiple levels across disciplines and format structures with a range of individuals and units.

- Problem solving - Sufficient aptitude to enable troubleshooting. Using orderly methods to find solutions through active listening, observational skills, data gathering, fact finding, and analysis to assess causes and potential solutions.

- Project collaboration - Using tech tools, analyse and offer solutions for project success throughout all organisational levels in pursuit of ultimate goal.

- Search and research - Capacity to seek and retrieve information via databases in order to execute basic qualitative and quantitative analysis.

A symbiotic relationship

Only by understanding the interdependent nature of these skill sets can individuals and organisations develop the capacity for 21st century success and sustainability, thereby fulfilling their obligation to their stakeholders.

In rethinking skill sets, we will need to change job descriptions and interview processes, deploy executives to manage teams and individuals in new ways, empower boards to learn and act in a future-focused capacity, exercise stewardship, and invest in continuous learning for all levels of the organisation.

Is it time for you and your group to use this new workplace skill construct as a prism to view a successful future?

Michael Butera ■ 114

Top Five Culture Problems
and How to Fix Them

Every leader shares the same objective: to create an amazing organisation that exceeds expected results and is an attractor of top talent. Although it's a subjective term, we think "amazing organisation" sums it up pretty well.

Of course, we've all lived in organisations that fall short of being amazing. These organisations aren't bad, and they get stuff done, but there is a constant reminder of the potential that is being left on the table, because that top-notch marketer we hired two years ago just left to work somewhere else, or the unending battle between the marketing team and the events team is constantly adding drag to our progress. That's not amazing — that's average, and we should do better.

But here's the truth that not enough of us are recognising: the difference between average organisations like those and the amazing ones is workplace culture. We're not saying strategy and operations are not important — they obviously are. But you can't reach "amazing" based on strategy and operations alone. They will get you in the game, but it's culture that makes you win, and here's why.

Culture is the water that your strategy and operations swim in. In that sense, strategy and operations are relatively independent. If you make a bad strategic move, that could hurt, though it's possible you could make up at least some of the difference with flawless execution. Similarly, if your operations are inefficient, you could, in theory, overcome that with some brilliant strategy.

But culture affects everything. When your culture is weak or misaligned, both strategy and execution suffer. Like that silo conflict between marketing and events — it limits your ability to deliver on your brilliant strategy, and it slows down execution. You'll still put on your events, and you'll still have a positive bottom line at the end of the year, but you won't be that amazing workplace that exceeds expected results and is an attractor of top talent. You'll be average.

And that's why fixing the problems inside your culture is so important right now. Just as culture problems cause your strategy and execution to suffer, fixing those problems has a positive impact on both strategy and execution, and can create a flywheel effect that can catapult you to "amazing." The good news is, improving culture is not as hard as many people think. It does require some clarity around the nuances of your culture — what we call "culture patterns" — plus an analysis of how your culture patterns are impeding success. But once you have that, it's as simple as changing some processes, doing some restructuring, or deploying some new technologies. As you change the way you do things, you will change your culture, and if you change the right things, you can become an amazing organisation.

Top Five Culture Problems and How to Fix Them

The Top Five Culture Problems

So where do you start? We have gone deeper than most in trying to peel back the layers of culture and figure out how culture impacts organisational success. Through our consulting practice over the last two decades, plus the research we've put into our books and, more recently, our culture assessment, we have been able to make some order out of what most people see as the "messiness" of culture. And while every culture is unique, we have identified the dominant patterns inside the cultures of contemporary organisations, and, specifically, there are five culture patterns that are having the biggest drag on success. These patterns represent the five biggest culture problems that you should be working to solve today if you want to become an amazing organisation. The patterns are:

Heavy Agility

Incomplete Innovation

Awkward Collaboration

Reactive Transparency

Micro Inclusion

Culture Problem #1 - Heavy Agility

Organisations that have this culture pattern will value forward action more than they value effective action.

Agility is about being able to change and maintain speed. In traditional management, agility was not valued. Change was carefully planned, slowly implemented, and controlled from the top. That might have worked for a factory in the 1920s, but in today's environment, nearly every organisation needs to be more agile than that.

And most organisations are trying. Through our culture assessment, we have seen nearly every organisation demonstrating a commitment to both quality and speed, and at a high level, most organisations are embracing change (what choice do they have!). We also see organisations making some efforts to push decision making down in the hierarchy to improve agility.

But we're still not seeing the senior level being fully willing to get out of the way and let people make decisions. And, perhaps more importantly, we see a lot of cultures that are admittedly not good at fixing things when they are broken or stopping things that no longer add value. That's why we call this problem "heavy agility." We're moving fast, but we won't get out of our own way. It's like running a race while wearing weights around our ankles.

The negative effects of this pattern include staff frustration and burnout, missed strategic opportunities, and unacceptable levels of inefficiency. It is very hard to retain top talent when this pattern is prominent in your organisation. Over time, when people realise that a certain percentage of their effort is going to be wasted because you can't fix things or stop things, or because the senior level will interfere and micromanage, they're going to look elsewhere. Life is short, and top talent wants to have a bigger impact than that.

Culture Problem #2 - Incomplete Innovation

Organisations that have this culture pattern will value the concepts of innovation more than the practices of innovation. We put the innovation pattern second because it obviously has relevance to change and agility. This was one of the first patterns that we spotted in our aggregate culture assessment data. Innovation is change that unlocks new value — it changes the rules of the game to gain access to the value that you couldn't reach by observing the rules of the status quo.

In traditional management, innovation was valued only tangentially. It was relegated to R&D departments and results were expected to be infrequent. Today, innovation is more of a mainstream expectation, though the amount of innovation required to drive success will vary depending on the nature of your business (e.g., nuclear power plants probably need less innovation than software companies).

We are seeing organisations embracing the concepts of innovation. In a wide variety of industries, we are seeing cultures where people can exercise their creativity in the regular execution of their job duties, and there is an overall focus on moving toward the future rather than sticking only with what worked in the past. They are even comfortable with people trying new approaches to things, though that permission extends only to individuals and is not systemic.

What is not as common, however, is true organisational support for the nuts and bolts work that is required to make innovation happen. Organisations are reluctant to let people run experiments or take risks, and the idea of beta testing or sharing unfinished products with customers in order to get feedback is not as supported. That's why we call this problem "incomplete innovation." We're talking the talk, but we're not walking the walk, and that's why the improved results — the true unlocking of new value — is not happening as much as we need it to stay competitive.

The negative effects of this culture pattern come frequently in the form of opportunity costs. Organisations are unable to innovate in a timely fashion, and competitors are able to gain ground andovertake them, because they are able to reach the new value faster. It is also increasingly difficult to attract the top talent when your organisation is perceived as a place where you do things because you've "always done it that way." The two dominant generations in the workforce right now — Generation X and Millennials — have always been used to change and innovation.

Culture Problem #3 - Awkward Collaboration

Organisations that have this culture pattern will value collaborative individuals more than collaborative groups.

Collaboration is one of those cultural elements that nearly every organization in today's environment says is critically important, though in traditional management, collaboration was not highly valued. In command-and-control cultures, people were expected to do what they were told and stay within their swim lanes. That rigidly siloed approach is less successful today where agility and innovation are required — if you don't collaborate, you'll likely miss opportunities.

And most organisations today put intentional effort into fostering collaboration. They have created cultures where people are willing to help each other out, and they make an effort to help colleagues build stronger relationships and improve facilitation skills to make collaboration easier.

That said, your average organisation today has failed to get rid of the silo issue, where departments don't collaborate well, and they are not as effective as they need to be in cross-functional communication either. This is why we call this pattern "awkward collaboration." We help each other out as individuals, but not across group boundaries, so we're never maximising the impact of the collaboration.

The negative effects of this pattern are around productivity and ineffective decisions. Because information flow is restricted and the right people are not consulted at the right time, the quality of decisions tends to decrease. Work often has to back track or start over once the right groups get involved, and duplicating efforts results in a lot of wasted time.

Culture Problem #4 - Reactive Transparency

Organisations that have this culture pattern will value reactive transparency more than proactive transparency.

Transparency is about information flow and visibility. Organisations must strike a balance: sharing everything with everyone is inefficient and can be overwhelming, but not making enough information visible to the right people at the right time can lead to mistakes and frustration.

Traditional management took more of a "need to know basis" when it came to transparency and information flow. Information was controlled from the top, and knowledge was power, therefore not distributed freely. In the post-internet age, however, a certain level of information availability is a given, and lack of information can lead to distrust, which can cause big problems in organisations.

Most organisations today have at least a basic commitment to transparency. As was the case with collaboration, we are looking for individuals who are willing to share information with each other. We have also invested in making the information that we share credible and meaningful, and most organisations

Top Five Culture Problems and How to Fix Them

will emphasise the value of trust, which includes information sharing.

What most organisations miss, however, is a more systemic approach to transparency. They are not creating systems and processes that are designed to increase information flow throughout the organisation, so people can have the information even before they realise they need to ask others for it. Leaders are still somewhat resistant to sharing details about tough decisions, and while they share more information that traditional management did, there is also reluctance to make openness and transparency the default approach.

The negative effects of this pattern show up around speed, missed opportunities, and employee engagement. Your people are happy to ask each other for information, but it adds to the time it takes to get things done, and frequently they will miss opportunities to take the right action because they did not have the right information at the right time. The lack of information is a big cause of disengagement among employees as well, as they feel they can't trust their leadership (or even other departments) who won't share information with them.

Culture Problem #5 - Micro Inclusion

Organisations that have this culture pattern will value personal inclusion more than structural inclusion.

The core definition of inclusion is about valuing difference, but from a cultural perspective, inclusion goes beyond just diversity to include supporting authenticity, autonomy, and a hierarchy that is welcoming across levels.

Traditional management did not pay much attention to inclusion. Who was included was based on title, function, or other rigid rules, and the broader societal issues around diversity, inclusion, and equity were considered separate from issues inside the organisation. In today's world, that approach is no longer viable, and organisations are taking steps to up their inclusion game and respond better to societal dynamics.

Most organisations are at least taking the first steps in terms of responding to the societal changes and internally they are intentionally trying to improve the employee experience around inclusion, particularly around authenticity, acceptance, and empowerment.

A truly systemic approach to inclusion, however, is still relatively rare. Organisations are still not applying the concept of inclusion to the way they do planning or to increasing involvement of people across hierarchical levels in the same work. Access to knowledge of strategic success drivers is still being limited to people higher up in the organisational chart. DE&I efforts tend to skew lower in terms of the depth of the work and the level of change.

The negative impacts of this culture pattern include lack of innovation, challenges with employee recruitment and retention, and weak strategic agility. Diversity is a prerequisite for diversity (if everyone thinks the same, we do what we've always done), and in today's job market, a lack of a visible commitment to diversity is going to rule out a large percentage of the top talent. And though few recognise it, the lack of inclusion around your strategic success drivers means your people don't adjust to an ever-changing environment like they should.

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Fixing the Problems

So here's the good news: fixing these culture patterns is not as hard as you might think. It's going to take some work, to be sure, but if you are disciplined and methodical about it, you can change your culture in ways that fix these five problems in a relatively short amount of time. You'll see real progress on the problem in a matter of months, and you can be reminiscing about the times your culture "used to be that way" in one or two years. The work of culture management is never "done," really, so don't obsess over the specific timing of your results, but the sooner you are diligently working on what we call your "culture playbook", the sooner you can achieve amazing results.

A Culture Playbook is a collection of "plays" that you run inside your organisation that will change the culture and fix the patterns. It involves changing things, stopping things, and introducing new things in the following six categories:

- Process
- Structure/Design
- Technology
- Talent/HR
- Rituals/Artifacts
- Stewardship

This is culture change — it's not rocket science, but you do need to be smart about it. In our Top five Culture Problems and How to Fix Them Whitepaper we have outlined specific plays you could run to solve these problems.

Maddie Grant, co-founder at PROPEL, is an expert author, culture designer and digital strategist who focuses on helping organisations prosper through culture change. She has specific expertise in digital transformation and generational differences in the workplace.

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Driving Better Decisions
Through Data

Diving into the deep end of your organisation's data on a regular basis might not immediately be on the top of your list of (professional) activities that spark joy. Believe me, it isn't immediately on mine either – and yet – I love it, or perhaps I love the huge impact it continues to have.

Like every story, this has a beginning, a middle and an end, however I am going to start at the end, take you to the beginning, ignore the middle, and instead share with you some principles and tips that might lead you to loving better data-driven decisions to transform your organisation.

Starting at the end:

For the last five financial years, IAP2 Australasia has seen a significant increase in all the key data indicators, I call these the BIG data:

- **382 per cent** increase in members
- **322 per cent** increase in training participants
- **172 per cent** increase in revenue
- **164 per cent** increase in net profit
- **316 per cent** increase in net assets
- **272 per cent** increase in staff.

These results aren't the outcome of just better data-driven decision making. They are part of a whole of organisation transformation that has a huge focus on delivering member value.

Back to the beginning

In 2017, IAP2 Australasia looked ok, with just over 3,000 members and 2,300 training participants it had an annual revenue of $2.9M and net assets of $1.1M. But dig a little deeper and the picture was quite different. A succession of CEOs over the prior two years had resulted in a bit of a leadership vacuum and it was in a sad and fragile state. There was an unstable and unreliable ICT system that was deeply scarring the team (now long gone), an exploding debtor's book, and brand and reputation concerns around the number of course cancellations (which later turned out to be a bit of a red herring, but it did start the data digging). In fact, nearly every aspect of the organisation needed attention.

So where to start?

Apart from a lot of listening, I needed data to determine what was the actual or real problem. Given the unstable and unreliable ICT system access to accurate data was problematic – but you have to start somewhere.

Principle #1: Develop a Data Strategy

This may sound overwhelming, but it doesn't need to be. We needed data to improve decision-making – so what data could we access or create that would help us to:

- improve the member and customer experience
- improve the employee experience
- manage compliance and risks around member and customer data.

And we immediately needed data that could inform the development of a Business Improvement Plan (BIP) and provide a series of indicators to let us know quickly if BIP decisions were working (or not).

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So, we started collating and reviewing the data that we did have. This included:

- membership data

- financial data, particularly related the revenue generation and GP from products and services

- course and participant data

- activity data from our product and service offerings.

The reality is that you need to prioritise financial sustainability to support transformation, and be able to reinvest in your purpose. The financial review of our product and service offerings on a line-by-line basis showed that much of it was operating at a significant loss. We just had to get smarter at this.

Principle #2: Be disciplined

There will be a whole stack of rules, checks and balances that you will create that support your Data Strategy. If you want to build quality data to drive better decision making, then you need to be disciplined – and this will mean different things to different organisations. It could mean:

- **Auditable and on time, every time –** ensure data dumps are extracted and saved with a strong file naming regime in place at the same time each month, quarter, etc.

- **Checks and balances –** if you are using data to drive insights, ensure that your formulas and methodologies are correct and consistent. Look for opportunities to validate the data or the insights.

- **Data structure –** how you structure data is so important. It needs to be easy to understand by everyone who is accessing it – so that as an organisation you are interpreting and communicating it correctly. I have seen some terrible examples that actually hurt my eyes!

- **Safety and simplicity –** there is no need to over-complicate how you collect, collate, and store your data. The simpler the better. We currently collate our data in excel (it is drawn from multiple sources including Salesforce and our financial system) and save it in a restricted access folder. Moving forward it will be safely captured in our new Finance ICT stack and provide much more valuable and timely reporting automatically – yay!

- **Stay focused –** some data is important, other data is interesting. Be clear on what is important - as interesting can lead you down a rabbit hole that you just don't have time for … and only you will know the difference.

Driving better decisions through data

Principle #3: Find the gold

This is where you find your joy.

- **Happy Meal KPI –** this may be the stuff of urban legends, but apparently a key KPI for a McDonald's franchise is the number of Happy Meals sold, as this indicates the number of future adult customers who will return to buy a Happy Meal for their children. Take the time to identify the Happy Meal KPI for your organisation. For us it was the total average participants per course. We use this figure to build our annual budget and we know that each increase adds about $100K to our bottom line.

- **Trends and insights –** are hugely important. We've gotten significantly better at this over time. With three years of data, we were able to develop a formula for the public course calendar that increased sales across our nine courses, increased the total average participants per course to a whopping 18.4 (maximum of 20) and minimised course cancellations to less than 3 per cent. Absolute gold!

- **Empower and invest in your team –** my amazing team makes our data sing. They are now the ones that extract, collate, coordinate, and manage all the data. They have also completely embraced our Happy Meal KPI and each month put in a huge collective effort to fill our public courses. Supporting this has been the individual professional development plan to ensure that they have the skills and knowledge to support a transforming organisation. Another quick brag – our Business Development Manager's conversion rate from proposal to contract is 54 per cent - which is amazing – and I only know this because we collect the data.

Principle #4: Get smart, stay smart

I've been trying to get smart and stay smart all my career. I guess this is the eternal quest – I'm still working on it.

- **Ask 'so what?' –** I 'play' in our data all the time. I'm looking for little indicators that might be early signs of a bigger issue or opportunity that I want to be in front of or maximise. I'm also looking for what else we should be collecting – what else is it that I want to know. I pop in for a few minutes and then an hour later..................

- **Closing the data gaps –** we all have these, and yet how often do we actually take the time to develop a plan to close the data gaps, or at least make an intentional decision to review them again in 6 or 12 months. Like everything you need to continuously review your data and data strategy.

- **Benchmark and contribute to benchmarking –** context is important, so it is useful to benchmark the data you are collecting to that of the association sector. This can provide additional insights and also help shape any new data that you should be collecting. However, it is important to contribute to benchmarking so that it is more relevant for your organisation and also to strengthen and advance the association sector as a whole.
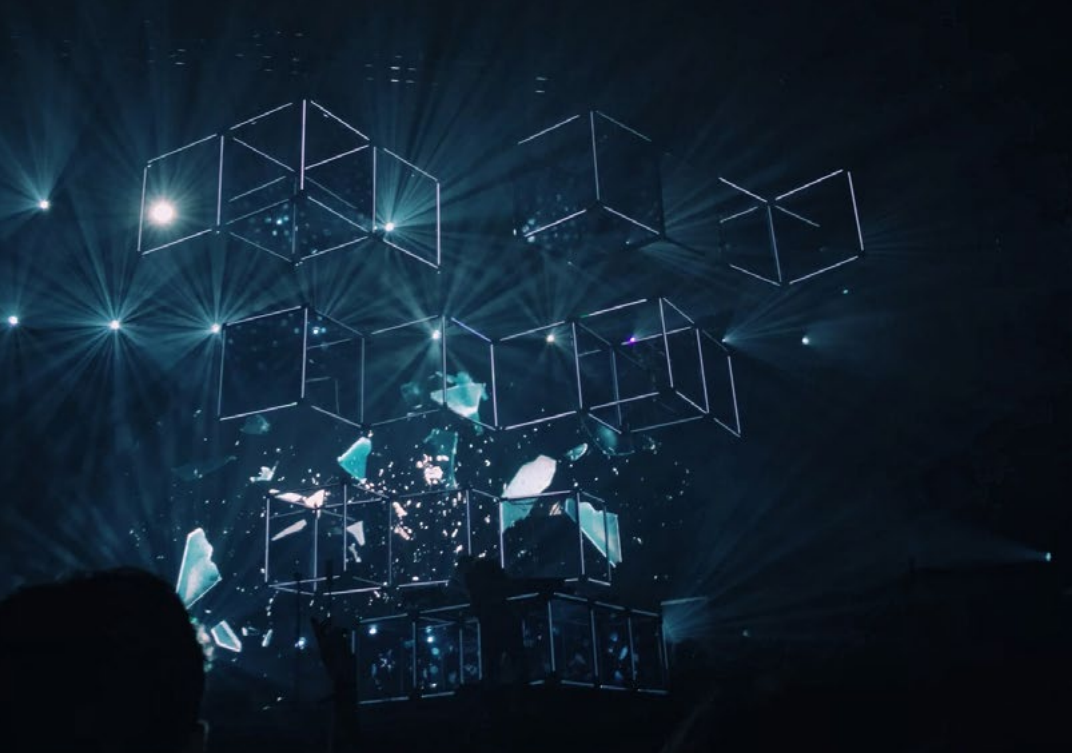
- **Invest in your ICT strategy and platform –** we review our ICT strategy annually and build our budget from there. In the five years that I have been in my role our ICT budget has increased from less than $100K to over $500K and so has our productivity. We have a ratio of 918 members to 1 staff member with the association average being 493:1 member, and our employment expenses as a percentage of total expenditure are less than the association average as well. So, the return on investment can be quite significant and our ICT platform is essential to our transformational journey and growth.

In closing, I would encourage you to take a deep breath, pop on your big girl pants – get started and enjoy the journey – I have.

Marion is a transformational leader with 15 years' experience in the NFP sector and extensive senior management experience in the commercial sector. A resourceful optimist, she grew up in the NT, and much of her life has been shaped by her Dad's words "well it can't be that hard".

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Let's Get
Digital

You might have seen this meme circulating on social media in 2020:

Who led the digital transformation of your company?

1. CEO
2. CTO
3. COVID-19

There's no doubt the pandemic accelerated digital change in many organisations – including associations – as they scrambled to cope with lockdowns, travel restrictions, and event cancellations. Many leaders say they compressed many years of digital change into a few months.

A few years ago, KPMG started an annual survey of Australian leaders and their biggest challenges, and published a report, 'Keeping Us Up At Night', to share the results. In its first three years, digital transformation topped the list of challenges. And in the most recent (2022) version, digital topics took all top four spots.

Let's examine each of these top four challenges – counting back from #4 to #1 – in an association context.

#4. Digital transformation

Fourth on the list, rated by 44 per cent of leaders as a significant challenge, is **'digital transformation and optimisation and extracting organisational value from it'.**

The key phrase is 'extracting organisational value'. Don't be digital just for the sake of it; do it to create real value for your team, members, board, and other stakeholders.

For example, I was working with one large association in Australia that promoted many chapter events on their website, but only the national secretariat could update the website. I encouraged them to enhance the website to allow chapters to load their own events, giving them more autonomy and freeing up the secretariat's time. This was not a trivial software update, but the return on investment was obvious.

#3. Working remotely

Coming in third, with 48 per cent of leaders rating it as a challenge, is **'the challenges and benefits of employees working remotely'.**

For associations, 'working remotely' applies not only to online meetings for staff members and the board, but also to members participating in online events. As much as people craved the return to in-person events in 2022, online events create many opportunities for associations.

Online events are cheaper, smaller events are feasible, larger numbers don't need bigger venues, and participants don't have the time and expense of travel. This means you can host more events, provide more affordable professional development, reach more regional and remote members, run low-cost promotional events, promote to more people to generate more revenue, invite speakers from anywhere in the world, and much more.

You can also record live online events to extend their reach, build a resource centre for your association, and create future revenue opportunities.

Think carefully about your mix of in-person and online events because they both have their place. For example, after surveying members, my professional association, Professional Speakers Australia, settled on this mix: We have one monthly online event for all members, and each chapter also runs their own monthly in-person event.

#2. Cyber vulnerability

In the KPMG report, 50 per cent of leaders rated **'dealing with cyber vulnerability'** as a significant challenge. They are correct, and I feel sorry for the other 50 per cent.

Becoming more digital is a double-edged sword: It creates new opportunities, but also opens up your association to greater risks.

The World Economic Forum described cyber-security as one of the top 10 global risks we're facing today. For your association, it has practical implications at an operational level and governance implications at a leadership level.

When it comes to cyber-security, the best advice is to get professional advice. IT professionals are good, but cyber-criminals are gooder, and are always finding better ways to breach your security. So don't try to manage this yourself.

#1. Talent for a digital future

Taking out the gold medal, a whopping 69 per cent of leaders in the KPMG survey rated **'talent acquisition, retention, and upskilling for a more digitised future'** as a significant challenge. And they are right, because digital transformation is about people first, not technology.

For your association, that means bringing members, staff, your board, and other stakeholders along on the journey. Some will embrace digital enthusiastically, others will reject it outright, and most will fall somewhere in between. Offer as many digital options as possible but keep non-digital options available for as long as possible.

Crucially, from a leadership perspective, it means enlisting people with a digital mindset. Engage young people on your board and in other leadership roles, look at digital innovations as an opportunity rather than a problem, and create an environment where you can experiment with new digital initiatives.

What is YOUR association's digital journey?

Many long-established associations struggle with digital change because of their history, culture, and traditional way of doing things. In your association's strategy, separate the 'why' from the 'how', so you can maintain your vision and purpose, while still embracing the digital options that help you achieve your goals.

Gihan Perera ◼

Gihan Perera is a business futurist, conference speaker, online presenter, and author who helps leaders and teams succeed in a fast-changing world. Forbes rated him the #5 social media influencer in the world – and #1 in Australia – in his area of expertise.

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Reimagining the Australian Psychological Society

The digital transformation era has arrived for member associations of all sizes, and it is about how we think, how we speak and what we do.

At the Australian Psychological Society (APS), we have adopted a digital-first approach to delivery. Our digital transformation underpins everything we do as we rewrite the rules and create a sustainable future for our organisation. Reimagining the APS is about ensuring we are future-focused and sustainable, and constantly working to understand and meet member needs. We cannot achieve this without the best and most innovative digital capabilities.

Of course, in our tightly-resourced sector, committing to a large-scale transformation can be hugely challenging and more than a little daunting – particularly for the Board of Directors who are required to sign off on what is a significant investment of member funds.

At the APS, we know the investment will be worth it. The returns for our organisation are already being seen in increased efficiency, greater agility and personalisation of our services. Ultimately, we are unlocking increased value for our members and anticipate that this will continue.

But it hasn't been straightforward, and it hasn't been easy. Our digital transformation has required a shift in mindset and an organisation-wide commitment. Bringing our people and our members on the journey has been priority number one. 18 months into our program of work, fundamental changes to individuals' and teams' roles can already be seen. For the most part, the change is welcome, and our people have embraced it with an experimental and innovative mindset.

So, what are we delivering?

We are investing more than $10 million over three years to transform the business of the APS.

- **New website:** Over 1 million people come to our website each year. We've delivered major improvements and new features to provide members and the public with tailored engagement and information.

- **APS app:** Our own app with face ID and a range of new features gives members everything they need to work with confidence.

- **CPD logging:** Upgrades to our CPD logging tool make tracking CPD hours even easier.

- **Registrar logging tool:** Registrar logging is a brand-new, dynamic system, helping psychology registrars and their supervisors easily track hours.

- **New member dashboard:** We are making it easier for members to access their profile, CPD, event information and news via their member dashboard.

- **Data and insights:** We introduced new business insights and analytics into the business to improve executive decision making.

- **Member database:** We have introduced a new membership relationship management system (or CRM) that will raise the APS technology capabilities into the future with greater member experience and personalisation.

- **Smart call centre:** The APS is the first organisation in Australia to introduce Microsoft Teams Calling into our call centre. This will integrate with the new CRM, providing smart caller recognition and reducing caller wait time.

- **Enhanced security:** We implemented class-leading data security systems which means our members' information stays up-to-date, protected and private.

The association space is changing, and we are proud to be at the forefront of that change.

Zena Burgess ■

Zena Burgess is an experienced non-executive Director and Chief Executive Officer with significant experience across commercial and social enterprise organisations. She holds a PhD in Organisational Psychology and Master's Degrees in Business Administration and Education. Zena became a Fellow of the Australian Institute of Company Directors in 2013. Prior to joining the APS in 2020, Zena was the Chief Executive Officer of the Royal Australian College of General Practitioners (RACGP) for 11 years.

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The Benefits and Limitations of Technology

I remember watching The Jetsons as a child and being in awe of the incredible technology it depicted. It was a wonder to see those flying cars and robotic citizens light up my television screen, promising a future where technology would enhance everyday life and our ability to connect as people. As we continue our journey throughout the 21st century, I cannot help but feel a bit conflicted by the degree to which technology has truly helped us in modern society.

For associations, there can be no doubt that technology continues to play a larger role in the day-to-day operation of the organisation. And for many associations, technology has greatly improved their systems and processes by automating and streamlining complex tasks that would otherwise take away valuable time from people.

But even with all the advances we have seen in technology, there is still no better way for associations to build meaningful connections with their members than to implement that human touch. Members want to talk to associations that speak their language, and don't reply from a script. Because at the end of the day, members are always going to feel more valued if there is a real person at the end of that phone line listening, engaging, and working with them through their problems.

Moving Associations Forward

From the perspective of a call centre for associations, technology has granted the ability to enhance the member experience in a number of ways. The implementation of AI integrated automated voice messages makes the calling experience more streamlined for members. Text to speech software can save time typing out long messages and help deliver information quicker. And video-call software such as Zoom and Microsoft Teams has allowed authentic connections to be maintained during the isolating reality of living through a pandemic.

If associations are always on a mission to improve the member experience and increase subscriptions, then technology provides the solution to simplify the tedious parts of the connection process and make it easier to interact with another person. When used correctly, technology should help associations automate many of their administrative functions, providing more time to focus on the human element in the relationship that associations have with their members.

But is Technology Fulfilling Its Promise?

The answer to this question is a bit more complex. According to a recent report from the Harvard Business Review, despite technology's ability to connect people from all corners of the world, as a society, we have never been more separated. People tend to keep to themselves, real friendships have never been harder to create, and loneliness has a way of creeping into our lives despite the ease at which we can talk to other people.

Associations should heed this current environment when reaching out to their members. Members find real value in associations who make them feel valued as people. That takes time and that takes effort on the behalf of associations to create a meaningful relationship.

Hearing a human voice on the phone reassures members that there is someone out there who genuinely cares about working towards a solution with them. Technology may make it easier than ever for that voice to be heard. But without that sense of human warmth, empathy, and understanding, associations risk creating a brick wall between themselves and their membership-base that only reinforces the pervading sense of isolation in society.

The Jetsons may have inspired me as a child with its depiction of a Utopian-like civilisation built on the back of fantastical space-age technology, but the real magic of that show was its story of family connection. As associations adopt new technology to transform their operations, it's important to remember that members will always value a human touch over anything else.

Colin is the Managing Direction of Optimum Contact, an association and membership-focused call centre that helps build stronger relationships between associations and members.

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Governance
In Action

Whatever your organisation, it seems almost unanimous that the role and focus of organisation governance is an ongoing struggle.

Without a doubt, governance needs to be bolder and more courageous as it confronts:

- **VUCA** (volatility, uncertainty, complexity, and ambiguity): an increasingly complex operational environment
- **Unclear Success Guidelines:** lack of clarity around what success looks like in a specific organisation
- **Struggle for true oversight:** the struggle to feel truly across the organisation's movements, and
- **Ambiguous decision pathways:** in an age of unending data and analysis, timely decision making from reliable and informative inputs has become ironically more difficult.

Governance

The critical nature of governance involves various elements such as:

- principles
- policies
- procedures
- responsibilities and
- accountabilities

These can all operate independently of one another. The secret of course is to have them working together in a manner that enables identifying and prioritising all stakeholder interactions within their ecosystem.

Governance may be viewed simply as a recognition of an organisation's stakeholder relationships i.e. how each of the above are lived day-to-day.

Where this often falls down is not in the documentation but in the lived and behavioural reality.

For example, just by having a bullying and harassment policy, doesn't automatically mean that bullying and harassment is non-existent in your organisation.

So the question for all Boards/directors to ask is:

How do we become sufficiently informed about the true lived reality across all governance aspects?

It is well-known that every organisation consists of a myriad of stakeholders – whether members, constituents, clients, management teams, the Board of directors, volunteers etc., which together challenge our understanding of what might be that organisation's unifying factor(s).

One significant contributor to achieving the integration and unity of the various stakeholders can be a well-developed, widely shared and fully embraced organisation strategy.

Re-imagining Governance

Governance historically has been relegated to what I would term "hygiene factors." For example, the makeup of the Board – number of Directors, selection process etc.

While important, hygiene factors are not the true impact intent of governance where the Director's provide **genuine stewardship and value creation** for the organisation.

By tracking the right combination of lead and lag indicators across all governance aspects, this enables governance to move from base level compliance box ticking to value-adding optimisation.

Set up for Success

Aspects that may be evident when undergoing your governance transformation include:

1. Board made up of competent, diverse, experienced and professional directors.

2. Directors and Executives that are committed, curious, bold and courageous.

3. Holistic single source of truth for ongoing monitoring.

4. Strong 'Value Creation' focus.

5. Transparent communication including reporting integrity.

6. Open engagement with key stakeholders.

7. Evident accountability throughout whole organisation.

Summary

In an increasingly complex operating environment, the role of the Board and Executive team in championing true value creation governance is more critical than ever.

For the organisation to be operating at its peak, there needs to be sufficient monitoring of the critical peak performance indicators. This covers everything from lag indicators (finance, risk, compliance) to the more proactive lead indicators (including the cultural and strategic alignment). Importantly, the indicators need to be representative of all key stakeholder groups.

The caution surrounds securing too much information, for information sake. Each metric should be carefully selected, with an understanding of the meaning behind results, both positive and negative, as well as when action must be triggered.

Since founding Enterprise Care in 1988, Damien has worked with thousands of Boards, CEOs, and Executives. His focus is on long-term practical, effective and impactful stakeholder solutions. Damien's portfolio continues to include multiple Board Chair and Board Committee roles, Deakin University MBA course presenter, author, conference speaker and guest presenter/facilitator.

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The Hidden Potential
of Risk

The process of risk management is well documented, with various standards and whole industries created to identify and manage risk. It is one of those areas of governance that appears on all Board Charters, often has its own Board committee established, and is a bit of a buzz word traded between Directors and management to show that it is being monitored and managed.

However, in most cases, current risk management practices do not fully unlock the potential of risk. Monitoring and management of risk only go so far. What is missing? How can we unlock the potential of risk?

Let's start with a Mindshift: "Strategy, Innovation and Risk"

Most Directors, when asked to define risk, describe their view of risk as:

- something negative that happens to the organisation.
- the potential for loss.
- something that can go wrong.

When asked how their staff view risk, the descriptions get even more depressing:

- it is complicated and difficult
- something we have to monitor and reduce.
- primarily a compliance issue that we have to do.

If these are the prevailing points of view on risk, then how will risk be managed by the Board and staff?

What if risk was something completely different?

What if risk was actually strategic advantage, hidden potential opportunity and the source of potentially amazing innovation? If the organisation chose to view risk from this point of view, how would the Board and staff view risk, and how would risk be identified and managed?

If risk is seen as a compliance and minimisation strategy, then that is all that will be focused on. If, on the other hand, risk is seen as the flipside of opportunity, and another way of looking at strategy, then strategic advantage and significant opportunity can be explored, managed and monitored as part of the risk management process.

This is the hidden potential of risk.

The point behind risk management is to identify all the potential risks, rank them according to potential to occur and possible impact if they do occur, determine the quality of existing controls on the risks, develop new controls and strategies for the risks (called "treatment" in risk jargon), monitor these and extract strategic advantage from the whole process. A simple process which is often made very complicated and difficult by the points of view that people hold about what risk is. And most organisations do not extract strategic advantage from the risk management process.

Risk should be an ongoing strategic conversation, not a compliance reporting function. The strategic conversation should be about:

1. What innovative strategies can we implement that will reduce the possibility of the risk occurring, and how can we turn each of these strategies into opportunities and possibly revenue creators.

2. What innovative strategies can we implement that will reduce the impact of the risk if it was to occur, and how can we turn each of these strategies into opportunities and possibly revenue creators.

Even the main standards on risk articulate this view. The two main formal definitions of risk are from Standards Australia (Australia) and the Committee of Sponsoring Organisations of the Treadway Commission (COSO, USA). They are very similar in intent, and focus on the strategic potentiality of risk, rather than the negative loss point of view. For example, AS ISO 31000:2018 defines risk as:

The chance of something happening that will have an impact on goals.

And risk management as:

The culture, processes and structures that are directed towards the effective management of potential opportunities and adverse effects.

Once the organisation has made this mind shift to viewing risk as another way of looking at opportunity, then it can begin looking at the possible revenue opportunities that are possible from managing the potential and the impact of this risk. Truly understanding the risk and putting in place strategies for managing its potential to occur and its impact if it were to occur, will always lead to future possible revenue streams.

Insight One: Refocus attention of risk managers, senior staff and Board on strategic opportunities arising from managing the risks, and possible revenue opportunities. Ensure risk is not seen as just a compliance issue but is a strategic issue that could provide competitive advantage.

An often misunderstood tool available to Boards is the Risk Appetite Statement.

A clear Risk Appetite Statement:

- Allows for a better understanding of our strategic goals, culture, context and sensitivity to risk.

- Contributes to the embedding of a risk culture that supports strategic planning and decision-making processes.

- Facilitated a proactive risk management approach to mitigate risks that impact strategic and operational objectives.

The Risk Appetite Statement articulates, in a meaningful and actionable way, the acceptable limits within which the Board, management and staff must operate in their roles and make decisions on behalf of the organisation.

One of the key functions of any Board is to agree on critical risks and ensure that management is monitoring those risks and have robust treatment strategies in place in case the risks do occur.

Regular Board reports that analyse these risks and their treatment should provide the Board with critical information regarding the key drivers of the business, potential innovation and strategic opportunity, and enable the Board to protect and advance the interests of stakeholders.

Board risk reports should be focusing on the agreed key risks (usually three or four), rather than obfuscating the potential strategic discussion by providing a full report on all risks. Too often, it is unclear what the Board should be doing with a risk report other than noting it.

Risk is the same as strategy. It should never be "for noting". There should always be questioning, exploring, testing and focusing on how risk management is creating impact and creating the future.

The Hidden Potential **of Risk**

In addition, robust and active risk management monitoring may provide some protection to Board members in the case of anything going significantly wrong. As stated by Standards Australia:

"Provided risks have been managed in accordance with THE STANDARD, protection occurs on two levels. Firstly, the adverse outcome may not be as severe as it might otherwise have been. Secondly, those accountable can, in their defence, demonstrate that they have exercised a proper level of diligence." (Guidelines for Managing Risk p.10, Standards Australia)

The lack of embedded risk management practices within the governance structure of an organisation is regarded as one of the highest risks facing an organisation.

An effective Strategic Risk Review process

Reviewing risk is not just about adding new risks to the risk register. It should be a review of all key processes involved in risk management to ensure risk is an integral part of the strategic conversations the Board is having.

As part of an effective strategic risk review, each of the following areas should be reviewed.

Board responsibility

1. Does the Risk Management policy address the opportunity aspect of risk

2. Is the Risk Appetite Statement in line with our strategic priorities, and do staff and Board find this useful guidance

3. Does the Board Committee charged with risk oversight regularly review risk management progress with senior executives?

4. Does our Board receive succinct reports on the two or three Board approved critical risks that have the potential to significantly impact the organization, and do they find these reports useful in shaping strategic conversations

5. Is the culture of our Board one of risk mitigation or strategic opportunity?

6. Has our Board established one or two key performance indicators (KPIs) for the CEO that reflect this risk management role;

7. Conduct an annual review of the key risks asking the questions: What has worked with managing this risk? What has not worked? What have we missed? What do we add? What do we take out?

Insight Three: Add two extra columns to risk management plans "Strategic Opportunities" to facilitate looking at risk as also a strategic opportunity, not just a compliance issue, and "Revenue Possibilities" to identify possible new revenue sources.

Risk Committee Responsibility

1. Have we identified key risks from stakeholder perspectives?

2. Are our risk criteria still suitable?

3. Have we reviewed key risks based on the risk criteria?

4. What has changed with key risks?

5. How are we turning the management of potential to occur and impact if it does occur, to our advantage? What are the opportunities?

6. Have we looked at the revenue possibilities from managing these risks

7. Are we keeping key stakeholders informed of our risk management?

Insight Four: Regular reports to Board that focus on the agreed 3 or 4 key risks, how they are being managed, what else could be done to better manage, how to extract strategic advantage and where revenue streams might be possible.

Senior Executive Responsibility

The Board has the responsibility of ensuring that risk management is embedded into the organisation, and is responsible for monitoring the critical risks and their treatment. The staff are responsible for developing the risk management policy (not approving it), identifying and ranking risks, developing reporting mechanisms, delivering education and performance measurements that reflect the risk culture and priorities, and allocating appropriate resources.

Embedding Risk Management into your organisation

Risk management is not just a staff function. It is a process and a way of seeing the world that should be embedded throughout the organisation, from the Board right through to the staff. Risk management should not be about compliance or protection. It should be about strategic advantage and innovation. The following are recommendations for embedding
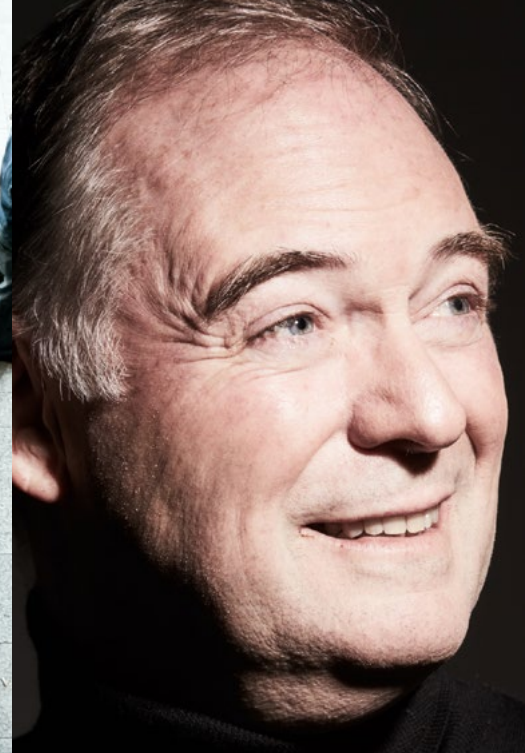
risk management throughout the organisation, starting with the Board.

Embedding Risk into Board Processes

Board Charter. The purpose of a Board charter is to combine purpose, responsibilities, relationships, culture, and reporting requirements of the Board. Risk management should be embedded into the Board charter as one of the key responsibilities of the Board.

Board induction. The Board induction process should include a discussion on the two or three key risks, the culture of inquiry around risk, and how the key risks are monitored, managed and leveraged.

Board Agenda. The Board agenda should have a discrete agenda item titled Risk Management where reports and discussion about the key risks are received. At least once a year, the key risks of the organisation should be reviewed to discern if anything has changed or if new risks have appeared.

Board Committee. Develop either a Risk Committee or specifically embed risk as a key component to one of the other Board committees (finance and audit, for example).

Annual Report. Ensure there is a report regarding the organisations risk management process, and a short description of the key risks and how they are being managed and turned to strategic advantage.

Annual Board Evaluation. At least one of the questions asked during a Board evaluation should be about how well the Board and individual Board members understand risk, how any risk discussion focuses on the strategic advantages, and seek evidence that Board members agree on the top three or four risks.

CEO evaluation. At least one of the CEOs Key Performance Indicators (KPIs) should be related to the risk management plan.

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The Association Event Managers Retreat will bring together event leaders in their field for 2 days of learning, sharing, and networking with other event professionals. With a keynote session from the leader of creativity Nicole Velik, an interactive workshop with Cindy-Lee Bakos and Gina van Dijk and a choose your own adventure style, this event is packed with inspiration. Attendees can expect to leave the event with a set of inspired strategies to fit their event planning style.

When: Wednesday 15 – Friday 17 February 2023
Time: Wed 2 - 6pm. Thurs 9am - 9pm. Fri 9am - 6pm
Venue: Hotel Bellinzona, Hepburn Springs, Victoria
Cost: Association Professionals $1300
Paid Answers Member $1200
Includes: Registration, Evening Functions, 2 Nights' Accommodation, Breakfast & Return Transfers

Register: Online at www.answers.net.au.
(if you're not a member you can set up a free account when registering).

The Association Leaders Exchange is a one-day version of our popular Association Leaders Retreat. This event brings together innovative senior and rising leaders from the association sector to boost personal and professional success by participating in in-depth discussions with subject matter experts on a range of topics including Governance, Boards, Technology, Membership, Revenue Generation, Leadership, Strategy, Innovation, Partnerships, Building Communities, and much more. Your fellow attendees have been through many of the same things you have. They are well-positioned to provide practical advice informed by relevant experience, as well as useful resources and introductions.

Time: 9am to 4.30pm
Includes: Registration, Lunch and light refreshments
Cost: Association Professionals $495
Paid Answers Member $395

BRISBANE

When: Wednesday 29 March
Venue: Brisbane Convention & Exhibition Centre

SYDNEY

When: Thursday 30 March
Venue: Fraser Suites Sydney

MELBOURNE

When: Friday 31 March
Venue: Melbourne Convention and Exhibition Centre

Register: Online at www.answers.net.au
(if you're not a member you can set up a free account when registering)

COMING SOON...

The Association Leaders Retreat enables Association Leaders to connect about relevant issues in meaningful ways to produce positive outcomes for you and your association. During three jam-packed days, Association Leaders will share insights, generate fresh ideas, and engage in stimulating discussions. Nestled in the far north of the Northern Territory, Darwin is literally a tropical paradise and is the only Australian state with a tropical climate which makes it the perfect Winter getaway. This event combines deep work with lots of creative space and experiences for optimal learning and growth. Attendees capped at 40 pax.

Email info@answers.net.au to be notified when registrations are open.

The Association Leaders Retreat enables Association Leaders to connect about relevant issues in meaningful ways to produce positive outcomes for you and your association. During three jam-packed days, Association Leaders will share insights, generate fresh ideas, and engage in stimulating discussions. Queenstown is a scenic town in the South Island of New Zealand and is home to a range of adventures, from the world's first and most famous bungy jumps - the Kawarau Bridge Bungy - to jet boat thrills. This event combines deep work with lots of creative space and experiences for optimal learning and growth. Attendees capped at 40 pax.

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These events are brought to you by Answers for Associations. Answers exists to provide pathways to connect Association Professionals to the answers they need to achieve success. In 2023, we have expanded our signature events to provide a more personal touch to your professional development and support you all year round.
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