

THE ASSOCIATION REPORT

AUGUST 2019

**Meet
David Pich
CEO, IML ANZ**

**Making change
happen:
representing
your members to
government**

**Sue Froggatt on
what to watch in
membership**

**Association
Annie**

**How to remove
a Director from
your Board**



**SPECIAL REPORT:
Association Apocalypse
whitepaper - what it
means for you**

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Answers for Associations

Contact Answers for Associations to discuss partnership opportunities

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The Association Report is a quarterly newsletter dedicated to showcasing the successes, innovations, and learning experiences of associations in Australia and New Zealand. It is produced by Answers for Associations, a network of leading consultants and businesses dedicated to providing tangible solutions to Australasian associations. Visit www.answers.net.au for more information. Front page image courtesy of IML ANZ.

Welcome



It is very unlikely, but in case you haven't yet read a copy of Belinda Moore's *Association Apocalypse* whitepaper it has caused a huge amount of discussion - even more than the *Membership is Dead?* paper of a few years ago. Not to worry - we've highlighted some key points in our special report beginning on page 6. If you haven't yet read it, you can download your free copy of the paper from the Recommended Reading for Associations section on the Answers for Associations website.

It's been a busy couple of months being out and about catching up and meeting people, trailing all the way from the AuSAE Conference and Exhibition in Brisbane, where the Answers team including many of our industry partners were pleased to exhibit and enjoy a fantastic educational and social program. All the way up to Darwin for our very own Association Leaders Retreat, where we enjoyed brilliant discussions, amazing sunsets and local country star, Troy Curtain, performing while standing on the back of a horse. Check out the photos from both of these events on page 20.

Being out and about, I have caught up with so many association professionals and the one topic that keeps coming up in conversation time and again is technology. Of course, there are some easy wins when it comes to technology - check out some of the apps and tools that we've been using lately or have been recommended by industry colleagues on page 18.

We only have a handful of events left this year, but we've really saved the best until last.

Governance in the Digital Age is the next in our free webinar series that will discuss how associations must adapt to survive the changing operating landscape and how Boards can lead their associations through these challenging times. We will be joined by three highly experienced and knowledgeable governance experts discussing the six key areas where board roles, responsibilities, and processes are evolving: value creation, resilience, risk management, strategy, sustainability, and personal accountability.

Belinda Moore has completely overhauled her **How to Develop A Membership Strategy** workshop to integrate the planning implications of the changing association landscape outlined in her *Association Apocalypse* whitepaper. If you have never seen Belinda present or even if you have, you really need to find out what is on the horizon.

Sue Froggatt is heading over from the UK for the first time in many years and will be hosting a workshop focused on **Creating an Incredible Member Experience**, so you can get and keep your association's most important stakeholders. This is a good one for anyone involved in member engagement.

Finally, one of my favourites, we're heading to Freycinet, Tasmania for another exclusive **Association Leaders Retreat**. There's just something so nice about being out of the office, in nature, that creates the most fabulous conversations and ideas. I'd love to see you there!

Happy reading!

Angela

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Out and about at the AuSAE Conference and Exhibition in Brisbane.



Enjoying the sunset on a break in the program at Answers for Associations' Association Leaders Retreat in Darwin.



And here's that gorgeous Darwin sunset!

Meet: David Pich



Chief Executive, Institute of Managers and Leaders
Australia and New Zealand
Key word: Culture

When **David Pich** began in his current role it was as Chief Executive of the Australian Institute of Management. Fast forward four years and significant changes have created the organisation now known as the Institute of Managers Australia and New Zealand (IML ANZ), a beacon of success in creating alliances. *Answers for Associations* caught up with David to talk about some of their more recent changes.

What were the drivers for IML to merge with the New Zealand Institute of Management?

"This was really a result of conversations between the two boards that had started about two years previously.

"What we recognised is that we are one of a number of associations that have the same drivers, purpose and vision. We entered into a sharing partnership with NZIM at that time where we'd meet and share information. We also shared some products. They had a leadership capability index that was fantastic. We had some tools and products that they used. That's how it started.

"Just previous to the merger with NZIM we signed an alliance with the Chartered Management Institute (CMI) in the UK. This gave IML the rights to offer the Chartered Manager designation in Australia and New Zealand. It was really that alliance that led to the merger because our purpose around increasing management competence is exactly the same as CMI's and NZIM's purposes. The formal merger made perfect strategic sense," David said.

Will other associations follow this lead?

"In a more general sense I think there are going to be more and more mergers and strategic alliances between member associations. The whole sector is under pressure. Much of that pressure is really about an association's place in the market and the value it offers to its members," David said.

"I think associations would do well to put ego aside and open their minds and their balance sheets to

the possibility of mergers or partnerships. Because a merger might be a step too far but typically these things flounder because you get caught up in operations, and who is going to have what position. We need to rise above that and realise the members are the most important people. With NZIM we asked 'what would the members want?' and after the first year of billing more than 80% of NZIM members have renewed already into IML ANZ. The members haven't rebelled, they have joined."

A history of success in mergers

David noted that IML has a successful history when it comes to mergers.

"We have a history of doing these things relatively well. AIM used to be seven state-based bodies and we became national between 2013 and 2015.

"We are in a fortuitous position in that we understand what we are doing when it comes to mergers, we had already gone from seven to one. But it really does require getting over the dreaded ego.

"What's best for the membership? Too many boards of associations are premised on vested interest and protecting vested interest. I would argue that vested interest is not necessarily member interest," he said.

David noted that the merger between IML and NZIM included changing the IML's constitution to ensure a NZ seat on the Board, and having a staff member and office in Auckland.

Strength in collaboration

"There is strength in numbers and collaboration, particularly for those associations that have similar goals and visions; there is plenty of opportunity for associations to put aside differences and join together, whether this is a joint venture, alliance, partnership or merger.

"IML is in conversation with a number of smaller associations about working more closely together – this could mean a merger, partnership or joint venture. There is not just one model that works.

"With CMI UK we have a joint venture – a merger wouldn't be appropriate."

What benefits have come from the merger to IML ANZ?

"We have become a truly international association. We represent managers and leaders across two countries. This gives us strength in numbers, a bigger voice," David said.

"It positions the Chartered Manager designation more strongly. It is recognised across Australia, New Zealand, the UK – CMI UK has centres in Malaysia and Hong Kong, but if you charter in Australia or New Zealand it is through IML ANZ."

Strength in numbers

David noted that the Chartered Manager accreditation was fully launched only eight months ago, but more than 1000 people have received the designation.

"(The designation) is not necessarily about learning skills, it's about accrediting the skills that you have already," David said.

"I've just been through the process. It is essentially a process of reflection, about management of self, others and business and operations."

Strength in culture: safe, healthy and inclusive

IML promote a member-centric culture called IML LIFE, with the four pillars of Leadership, Innovation, Focus and Excellence.

"You would expect us to place membership and leadership at the heart of our culture. One of the key aspects of business is we practice what preach. We take that very seriously internally," David said.

But he also notes that a holistic approach is needed to created culture.

"We're relocating four of our offices at the moment, in Sydney, Canberra, Melbourne and Adelaide. In all of the new offices we're putting in parenting rooms that are being designed by the women.

"There are also Q rooms – quiet rooms where people can go and reflect and do whatever they need to do. On its own these spaces are meaningless, but when they are added to Returning to Work, Flexible Work and Time in Lieu policies it becomes a holistic approach to culture," David said.

"We also have policies in place for people leaving domestic violence situations and we've put panic buttons in all of our offices.

"We tend to think through all of our culture on the basis of being safe, inclusive and healthy. These mean something at IML," David said.

So, what does the workplace of the future look like?

"I feel quite strongly about this. The workplace has been this place where we traditionally spend

Sharing learnings on leadership

David and IML ANZ Chair Ann Messenger have co-authored *Leadership Matters*, focused on essential leadership skills and now *Leading Well* which identifies key personal attributes that create strong leaders. Each book includes chapters written by guest authors.



"I wrote about respect, which is about recognising and celebrating difference. I don't think we have enough of this. Our views tend to be based on our own background and our own skills," David said.

eight to ten hours a day. It's been traditionally set up around white, middle class men – it's been their zone. There is a movement against that. There is a movement that it has to be something different. The people coming into the workplace don't have those cultural values. We're getting more diversity," David said.

"Uber would be one example of an organisation that is challenging the traditional workforce.

"If we're going to attract people who have not wanted to go into the workplaces of the past we need to change. Our children are growing up in a world where people don't wear a suit and tie. Or use a pen. There is a tide of change coming and there's no point pretending it's not.

"There is a generation coming through that recognise that wearing ties and working 9 to 5 is pointless. Everyone is on their mobile phone all the time. There is a merger of work and social life. The current workplace won't exist in 10 to 15 years time.

"It's about recognising change and doing what you can to keep up with it. We all know what happened to the dinosaurs. I find this whole holding on to tradition completely bizarre because it's an historical fact that traditions end.

"I'm very cognisant of the fact that I'm in a privileged position. It's easy to say these things in a privileged position. We need more people to say it.

"I don't have an office, you'll never see me in a suit or hear me commenting that people have the wrong piercings or tattoos. The point of privilege is that you use it wisely."

Learn more

Visit managersandleaders.com.au to learn more about the IML ANZ and the Chartered Manager designation. *Leading Well* and *Leadership Skills* are available on the IML ANZ website or bookstores.

ASSOCIATION APOCALYPSE



Belinda Moore's latest whitepaper outlining the dramatic changes affecting associations right now is striking a chord with association leaders. Here is *Answers for Associations* summary of key highlights: the changes that are coming, how to get your house in order, and how to strengthen your operations.

The two most cogent concepts overriding the whitepaper are urgency and congruency:

- **urgency** because changes are occurring now and quickly,
- **congruency** because while each change is significant on its own, they are not occurring in isolation of each other - they are all occurring now.

Associations with the will and capacity to change have the opportunity to become stronger than ever before, creating highly connected and engaged communities that fulfil members' needs. Conversely, those that get stuck in the past, in existing processes and offerings, will be left by the wayside.

Changes are coming

- ⇒ Technological
- ⇒ Generational
- ⇒ Competitive
- ⇒ Tangibility
- ⇒ Personalisation
- ⇒ Community

Get your house in order

- ⇒ Business models
- ⇒ Membership structures
- ⇒ Component frameworks

Strengthen operations

- | | |
|--------------|------------------|
| ⇒ Leadership | ⇒ Governance |
| ⇒ Strategy | ⇒ Staff |
| ⇒ Financial | ⇒ Processes |
| ⇒ Technology | ⇒ Offer |
| ⇒ Brand | ⇒ Communications |
| ⇒ Engagement | |

Change: Technological

Associations' websites need to become 'the hub' for their profession's or industry's community.

Developers are already looking at ways to integrate machine-thinking and artificial intelligence into association software. This will enable micro-personalisation on a mass scale, enhancing the members' experience. It will provide real-time data for decision-making and allow new channels for engagement. This technology will become more refined and affordable with time, but for now there is no vendor leading the market: watch out for new start-ups or reinvigorated existing vendors in this space.

The level of service offered by associations is also expected to be on par with corporations - Uber, Amazon, NetFlix and more - who provide on-demand service personalised to the user. This is now an expectation of service levels.

Change: Generational

From Baby Boomers to Generation Z, the different worldviews and experiences of people in the workforce right now are so diverse as to make excessive influence by any one generation detrimental to the success of any organisation seeking to attract members from multiple generations.

Baby Boomers established many of today's associations, building them from grassroots movements to suit their needs at the time. With Baby Boomers retiring, associations need younger people to take on leadership roles but societal and economic changes mean that how this happens needs to be revisited. Associations need to be able to bridge the generational divide.

Change: Competitive

We've always known that associations are competing not just for membership or professional development spend, but also against opportunity cost: do I spend a few hundred dollars on membership or put it towards a holiday or bills? Does my organisation direct budget to memberships or other costs? But now associations are facing direct competition from new players who are disrupting the market. From their mobile phone an individual can create a discussion group and connect with hundreds of like-minded people and potentially solve some of the same needs as would an association.

At the other end of the scale, LinkedIn is investing heavily in activities that can compete directly with associations. They have recently launched LinkedIn Learning, a platform that could compete with your learning programs and impact revenue and standing.

While this sounds doom and gloom it is also an opportunity for associations to excel. As member-based organisations, associations hold within their membership critical expertise which can be leveraged to raise your association's profile.

This level of competition also provides a strong driver to support mergers, joint ventures and partnerships between associations.

Change: Tangibility

Measuring member retention and acquisition is a great way to assess whether your association's membership strategies are working effectively. But they are not a measure of how well you have achieved your organisation's core purpose - it's like counting bricks to measure how well your house has been built. By measuring meaningful outcomes associations can share their true success - for example by creating a legislative change or building members' skills. Focusing on purpose and tangible outcomes allows associations to mobilise and inspire their staff, members and broader community in a way that focusing on member numbers simply cannot do.

Change: Personalisation

The value of membership is not a one-size-fits-all proposition. The tangible value each member is seeking from your organisation is aligned with their own needs, interests and aspirations. The models that association's are using to segment their members are evolving. Where previously they may have been segmented on stage of their career, their interest area or their product usage now some associations are introducing membership categories based on individual (or organisational) members' activities. A deep understanding of your association's different market segments - or even each individual's actions and interests - is essential for continuous improvement and innovation in your membership offering.

Change: Community

A strong, engaged community is a powerful competitive advantage for associations - and understanding your segments and tribes is a powerful way to build your community. Note that while market segments are defined by the association (e.g. student members), tribes are groups that already exist. Tribes are driven by shared passions, needs, interests or habits. There are likely multiple tribes within and without your association with whom you can seek to build trusted relationships.

When changes combine

Here are just some examples of the powerful waves created when changes collide.

Technological + Competitive + Community

While associations are waiting on vendors to create new technology, it already exists for our members and prospective members. Connections are made on social media and platforms such as LinkedIn, Facebook and Whatsapp provide plenty of opportunities for people to connect to discuss their issues.

Generational + Tribalisation

Generation Z are digital natives - as a group they have the power to connect globally and immediately to drive causes that are important to them.

Generational + Personalisation

People are staying in the workforce longer and changing careers - not just roles - throughout their working life. Assuming the level of support a member needs is based on their age or generation is at best imprecise - they could be beginning a new career in your industry later in their life.

Continued over ->

Getting your house in order

Business models

Traditional association business models are no longer effective as they cannot effectively cultivate powerful communities. These traditional models limit an association's ability to implement a community-oriented model.

Instead of the traditional "provider of services" model, associations can step into a new business model to become a platform that facilitates positive outcomes for members as well as the professional or industry community. This can be supported with developing technology and community engagement skills, but does require a change to the way associations operate.

These new models will create a range of new revenue generation opportunities, with your competitors becoming your customers.

Associations can look to the LinkedIn platform for ideas and inspiration:

- It's easy and free to get involved.
- You generate benefits immediately.
- You only pay for what you need.
- LinkedIn has a Premium Membership for power users.
- Their automated marketing actively generates a baseline of new members.
- LinkedIn facilitates communities but doesn't run them.
- LinkedIn is monetising its community by providing new products.

Membership structures

There is no one-size-fits-all solution when it comes to creating membership structures however associations need to adopt more intuitive offerings. Traditional membership models are rapidly evolving to community based models which will allow associations to more powerfully serve their professions and industries.

People regularly change their career, have access to technology, are seeking to build connections and access tangible outcomes tailored to their own needs - so their needs from membership also change.

We are becoming conditioned to "pay by the month" and "pay as you use" models. As we deepen our knowledge of our membership segments there is an opportunity to create more intuitive offerings that align with members' needs and preferences.

Structures need to enable all parts of the association's community to actively engage. For example, associations with organisational members need a structure that enables them to engage with as many individual contacts as possible within each member organisation.

Component frameworks

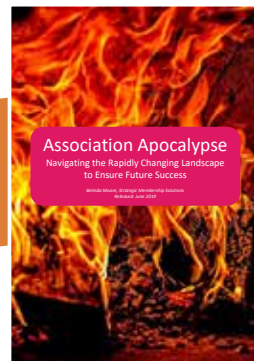
The term "component" refers to the variety of groups that sit within the association's remit such as special interest groups, branches, sub-committees, working groups, and Board. Used effectively, components strengthen an association.

Single entity organisations tend to have centralised component frameworks, with relationships managed from head office; where there are regional office or special interests a decentralised structure may see components managed via state offices or different parts of the organisation.

Moving forward, a distributed component framework is recommended - this allows members to create their own components (or tribes) within the association.

Any of the three models requires community engagement skills, however the distributed model gives members power to engage in ways that suit them, allowing the community to flourish.

Strengthening operations



Leadership

Leadership in the association space is changing with new leadership models and techniques becoming popular (such as Agile leadership) and providing ways to engage internally and externally more effectively.

Governance

Much has changed since the most common used reference for meeting procedure in the English-speaking work (Robert's Rules of Order) was published in 1876. The fast paced, tech savvy, shifting operational landscape of today needs a modern governance structure to match.

Strategy

Robust strategic planning enables the development of a clear roadmap forward to achieving an inspiring vision of the future. Evidence-based strategic planning processes that create measurable, time-dependent objectives that flow throughout the association as an operational KPIs. Effective monitoring and reporting against the strategy that feeds into the ongoing strategy refinement process.

Staff

A healthy, passionate, outcomes-focused, collaborative workplace that does not tolerate toxic staff members.

Financial

Strong, diversified income streams; pro-active minimisation of inefficiencies; and effective financial management. Ideally associations should have 4-5 strong revenue sources implemented in a considered way.

Processes

Policies and procedures must be designed through the lens of the member experience. Strong policies and procedures embedded into the technological framework of the association, that streamline operations, maximise efficiencies to save staff time and money, and ensure consistency.

Technology

Associations must invest in technological solutions that will enable them to become a platform that enables strong communities to thrive.

Offer

The kind of value a prospective or existing member expects can be broadly understood by the type of association they are joining.

Brand

Associations need to focus on becoming a brand that your community want to align with - members don't join (or renew) for your products and services. They do so because of their perception (opinion) of your products and services.

Communications

We are drowning in a never-ending stream of communications that bombard us from all directions and if an association is continually sending irrelevant messages then we will stop listening.

Engagement

Associations are no longer the providers of information. Instead they are the facilitators of meaningful interactions between members and their greater industry or professional community.

Our tips

There are a wealth of resources available to associations. Here are some of our tried and test favourites - many of these and much more is available at answers.net.au/resources

For leadership, management, staff, culture and more check out the Institute of Managers and Leaders Chartered Manager accreditation and resources.

There are a wealth of governance and board-related resources available via the Governance Institute of Australia and Answers' partner Diligent.

For an easy start to organisation strategy download the free template "Organisational strategy on a single page" from smsonline.net.au/freetools.

To diversify income streams have a conversation with some of Answers for Associations' partners who can help out with revenue-generating partnerships programs in insurance, salary packaging and more (see the inside front cover of this issue). You'll also find help with technology, communication, branding and engagement.

Learn more



Download the full whitepaper and other free resources from author, Belinda Moore, at smsonline.net.au.

Contact Belinda on 0413 190 197 or email Belinda@smsonline.net.au.

How to remove a Director of a Company

We rely on our Directors to provide strategic direction and, for more operational Boards, hands-on support. But every so often there is a genuine clash or unruly individual who needs to go. *Answers for Associations* asked **Vera Visevic**: what's an association to do?

The case at hand

A Director had been quite disruptive to board proceedings. Accordingly, the other Directors wanted him to be removed from the board. As it is illegal for a board to remove a Director, the other Directors asked the members to remove the disruptive Director by following the process in the Corporations Act.

Pursuant to section 203D of the Corporations Act, the members proposed an ordinary resolution to remove the Director from office. The disruptive Director was quite upset about what was happening, but he refused to resign from the board. He wanted to front up to the members to defend himself. Nonetheless, on the morning of the day of the general meeting, the problematic Director resigned, so the process for the removal of the Director did not proceed. This is a common occurrence in these types of situations, that is, that the directors who are being ousted resign before the members' meeting.

There are many reasons as to why you would consider removing a Director from your Board. It can be a difficult decision and there are certain procedural steps that must be followed to ensure that the process is both fair and proper.

What does the legislation say?

Section 203D(1) of the Corporations Act 2001 (Cth) (Act) provides that a public company may by resolution remove a Director from office despite:

- the company's constitution;
- an agreement between the company and the Director; and
- an agreement between any or all members of the company and the Director.

The process in the Act will override any clause in your company's constitution which sets out a process for removing a Director.

Do you need a reason to remove a Director?

There is generally no legal requirement to provide a reason or justify the removal of a Director of a public company under section 203D of the Act. However, it is important to follow the correct procedure to avoid the removal being regarded as oppressive or unjust under section 232 of the Act, and consequently by the Court.

Common reasons why a Director is removed

It is common for a Director to be removed from office:

- if they do not have a definitive term;
- if they have made public comments which are contrary to the member's perspective;
- if the other Directors find the Director to be disruptive or uncooperative and ask the members

to attempt to remove the Director (as the other Directors have no power to do so); or

- if the process to elect or appoint the Director was somehow controversial.

Procedure to remove a Director

Step 1: Notice of Intention

The members have to issue the company with notice of intention to move the resolution to remove the Director. The members who could issue a notice would be:

- members with at least 5% of the votes that may be cast at the general meeting; or
- at least 100 members who are entitled to vote at the general meeting.

Step 2: Notice to the Company

A notice of intention must be given to the company at least 2 months before the meeting is to be held. If the company calls a meeting after the notice of intention is given, the meeting may still pass the resolution even though the meeting is held less than two (2) months after the notice of intention has been given.

Step 3: Notice to the Members

The company needs to give at least 21 days' notice to the members of a meeting of the members at which a resolution will be moved to remove a Director.

Step 4: Inform the Director

As soon as practicable after the company has received the notice under step 2, it must give the Director a copy of the notice. This allows the Director to put their case to the members, by giving the company a written statement for circulation to members, as well as speaking to the motion at the meeting.

Ideally the written statement would be sent to everyone to whom notice of the meeting is sent if there is time to do so. However, if there is not enough time, the statement may be distributed to members attending the meeting and be read out loud before the resolution is voted on. The exception to this would be if the Director's statement is more than 1000 words and/or defamatory.

Step 5: Voting

Only an ordinary resolution is required to remove a Director. This means it only needs to pass by a simple majority of 51%.

Learn more



This article only applies to associations covered by the *Corporations Act 2001 (Cth)*. Incorporated associations will need to find the appropriate process for their organisation by reviewing the relevant Incorporated Associations

legislation within their jurisdiction. A number of fact sheets are available on the Mills Oakley website or you can contact Vera Visevic on (+61) 2 8289 5812, email vvisevic@millsoakley.com.au or visit www.millsoakley.com.au/expertise/not-for-profit-and-social-enterprise/

Governance in the digital age

External forces gripping the association sector are pushing Boards to make a leap from the known elements of the past to an uncertain but necessary future. *Answers for Associations* spoke to **Dottie Schindlinger**, Vice President of Thought Leadership at Diligent and co-author of *Governance in the Digital Age* to learn what changes are occurring and how we can best support our Boards for the good of our members.

It's harder to be on a Board...

Dottie noted that the way we view Boards and our expectations of Board Members has changed dramatically in the last ten years.

"We used to view Board service in a different way, it was a badge of honour. You were lucky and honoured to be a Board Member and you might sit on a number of Boards at once. Now, if you are really doing a good job two Boards is a challenge, and three is nearly impossible. It's a really hard job. We've asked Board Members to step up their game. We have more transparency. For example, now you could find out on social media that your CEO has been accused of misconduct before you hear it through formal channels. That wasn't true ten years ago," Dottie said.

"We judge organisations based more on their reaction to an incident - and their board's reaction - than on the incident itself. We ask, 'What did Board Members know? What did they do about it?' This has changed significantly in the past ten years. Gone are the days when board members could simply show up to a meeting and find out what decisions need to be made only after walking in the door. Now, Board Members must be better informed and keep educating themselves. Board Members who don't do this are putting themselves and their organisations at risk."

"We are going to start seeing Board Members demanding as much as is demanded of them. They are going to expect a lot more transparency: What are outcomes of programs? What research have we done? Are we paying employees a fair wage? How do we stack up against the competition?"

Despite the significant changes affecting Boards and associations, Board Members are still expected to respond instantly and deliberatively to issues. Dottie notes that modern governance approaches and use of technology can facilitate this process.

"Boards need the right tools and information. We need to fuel their curiosity so they'll be better Board Members for us. So you need to think differently about how to communicate to the Board."

"For example, use digital tools to create transparency with the Board. They should have access to the most current and accurate data, but also give them executive summaries highlighting the key discussion items - especially if there's a crisis blooming. You want the Board to bring diverse perspectives and dig deep - even if the conversation gets heated. It's better to have that heated conversation for the first time with the Board than in front of a camera with a reporter!"

Organisations are evolving

"Many associations are struggling to survive as competition for members' time and dollars increases. Associations used to be the primary way to connect people with similar interests - but now, most people use social media to fill this need. So Boards of associations are challenged to find ways to remain relevant to members. Some are merging and joining forces as a survival strategy - I believe we're going to see more and more of this," Dottie said.

"A lot of change is fueled by competition - which includes how people are spending their free time and using technology. Association Boards should be spending most of their energy on digital technology strategies if they want to thrive."

"It is a fundamental conundrum affecting your Board: technology is the single biggest factor changing every part of your members' lives."

"For many boards, digital technology strategy rarely comes up in conversation. If your board has not discussed this topic in more than four months, you run the risk of becoming obsolete. Associations can lean into digital technology, or find themselves getting steamrolled by it."

Learn more

Governance in the Digital Age, A Guide for the Modern Corporate Board Director by Brian Stafford and Dottie Schindlinger is available in bookstores now.

Attend a free webinar facilitated by Megan Motto, Governance Institute of Australia and featuring Dottie Schindlinger and Sue Forrester, Chairperson, National Veterinary Care. Register at answers.net.au/events/



Contact Joanne McMaster, Regional Sales Director for Diligent on (+61) 422 560 728, email jmcmaster@diligent.com or visit diligent.com/au



Making change happen

Representing your members to government

Association members expect their association to provide a voice for them to government if there is an ongoing concern, or in reaction to an issue. Your association's lobbying efforts may be the most important activity you undertake for your members. While some associations have a well-resourced unit charged with this task, many don't know where to begin. *Answers for Associations* spoke to government relations expert **Jo Scard**, who shared some key tips on how to work effectively with government.

1. Chill out

"Associations can undertake a more formal approach than necessary, which can turn into a long list of requests," Jo said.

"These requests may be inappropriate, out of context or unrealistic. Work out what your most important and realistic request is, and focus on making that change.

"For example, you may decide to seek a change of legislation or public funding for a program, such as education around an issue," Jo said.

"After you determine what change you are seeking, you need to work out your strategy, and who you are going to approach."

2. Do the work

Jo advises that seeking a significant change is likely to require a complex set of meetings with a range of stakeholders including government departments and committees.

"Think about who you will need to talk to, and even in what order you should meet with them to secure their influence," Jo said.

Jo advised creating a one to two page rationale outlining your request and reasoning, although a more detailed funding proposal will be needed if it becomes part of the government's budget process.

3. Research!

Jo advises conducting background research prior to requesting meetings.

"Find out whether the people you are wanting to meet with have existing views on your issue: what have they said before, who are the sorts of people who might influence them, what are the views of their colleagues?

"You can do this research online with key word searches, reviewing media sites, and reading Hansard," Jo said.

4. Pick up the phone

"Don't send an email to an MP's generic email address and assume that they will respond. That doesn't happen. You need to be persistent," Jo said.

"Think about how politicians operate in the world. It's fast and busy. You have to be able to open doors and be heard - that's what I think people get scared about. They think a formal letter or one email will do, or that they can host an event and invite ten people and they will all come. You have to really persist - and invite everyone!"

Jo noted that associations can approach their local Member for advice.

"Just remember that your Member will have an agenda. My suggestion would be to get a second opinion on any advice: if you speak to a Liberal MP also speak to a Labor Senator or vice versa," Jo said.

"Success is about having realistic expectations, investing the time and doing the work. People don't realise the enormity of breaking into that process for the first time."

5. Don't let changes stop you

"There has been fragility in our government over the last decade, with slim majorities and changes in ministries. But even if positions change, there is still a Prime Minister and government and they are still making decisions and spending money," Jo said.

Persistence pays off for PANDA

Jo worked with Perinatal Anxiety and Depression Australia to assist them with a number of funding rounds, and engagement around awareness. A stakeholder engagement audit involved speaking to people in government to ascertain what knowledge they had around depression (not a lot).

"We introduced PANDA to try to get some support. We made sure the people who needed to know about them, did. We contacted every federal politician and once they started talking amongst themselves we were able to progress the conversation.

"Any initial campaign is hard but it becomes easier after you have established your credibility and delivered on outcomes. PANDA has just received renewed funding, which is a great win," Jo said.

Learn more



Contact Jo Scard, Founder and CEO at Fifty Acres. Call (+61) 2 6281 7350, email jo@fiftyacres.com or visit fiftyacres.com.au.



From saving events to saving the planet

Events are the lifeblood of associations, and with the disruption occurring within the sector right now the knowledge sharing and connections that they create only increases their importance. For those of us on the organising side, we want to be sure that they run without a (visible!) hitch.

Answers for Associations spoke to the team at Australia's newest major convention and exhibition centre, ICC Sydney, about their award-winning first two years of operation and a surprising theme emerged: water. Read on to learn how they helped the environment, dealt with a flood, and delivered the best attendance in its history for an event about – you guessed it – water!

Partnering with Sydney Water

In a partnership that helps the planet, ICC Sydney and Sydney Water are using reusable glass bottles and tap water in meeting rooms. ICC Sydney hosted a taste test with their own Beverage Operations and Cellar Manager, the Lifestyle Editor from Choice, and Sydney Water's Principal Advisor Public Health. Not one could tell the difference between the tap water and bottled water, but by saving over 775,000 plastic bottles in the first year alone it has already made a great difference for the environment.

Too much of a good thing

We've all heard stories of things that go wrong at events, but how about one that affects three events at once? ICC Sydney's Event Floor Manager Jeff Blackman shared the story of a client display

that created a water leak overflowing from the upper halls to the lower at 4am. With two events – including an exhibition – due to bump in at 7am and welcoming 6000 people by 9am, the team managed to move the exhibition to a different hall; rejig the floor plan to suit the new space; move catering, security and many other services all whilst organising extra staff and digital signage to welcome attendees to the new space.

Jeff noted that the ICC Sydney team worked with the clients to ensure the changes were handled as seamlessly as possible and it was a true success.

Water industry conference surpasses delegate numbers

The Australian Water Association (AWA) hosts Ozwater annually – this is an international conference and trade exhibition attended by thousands of water professionals and hundreds of exhibitors, sharing ideas and insights about the future of water. This major event was held at ICC Sydney during the venue's first year of operations and resulted in a 12% increase in attendance from previous years. AWA CEO Jonathan McKeown praised the venue for the high calibre delivery of this multi-day event.

"The team at ICC Sydney supported us right from the planning to the delivery stage of our event. The feedback we have received from our delegates and exhibitors has praised the quality of the venue, its service and staff, with many saying they cannot wait for us to bring the event back to ICC Sydney in future," he said. The event is due to return to Sydney in 2021.

From their significant environmental initiatives (water is just one) through to their high quality event planning and delivery, the team at ICC Sydney could be the perfect partner for your next event.

Learn more

Tina Eggers is Business Development Manager - National at the International Convention Centre Sydney. Contact Tina on teggert@iccsydney.com or call (+61) 02 9215 7113.



WHAT TO WATCH IN MEMBERSHIP

Sue Froggatt

With the winds of change continuing to gust through the association sector, Answers for Associations asked UK membership expert, Sue Froggatt, to share her perspective on changes across the globe. For more than 20 years Sue has trained and consulted with member-based associations. She has conducted four industry benchmarking studies and co-authored Managing the Membership Experience with (US-based membership expert) Mark Levin.

Technology has made the biggest impact

Without a doubt the biggest impact has been technology. The pace of change has been incredible, so not good news for organisations that are traditionally slow to change.

There are lots of new communication channels, new devices and new interfaces. Also the volume and type of data now captured continues to grow at an exponential rate, and for those able to analyse this, it will deliver great insights about how to provide new ways to add value for members. Being at the centre of communities, this can open up unique and new opportunities for the role associations can strategically play in the future.

A few years ago a new membership organisation called Sermo emerged – a free to join community of 800,000 physicians and they took full advantage of what technology can offer.

Sermo allows doctors from anywhere in the world to post real life cases and collaborate and get help from other doctors. Members remain anonymous so doctors' details remain confidential and they have a safe space to ask questions and share answers.

What is interesting is that technology aggregates these comments and shares them with medical suppliers who pay to review this rich vein of live research and insight to improve their products. Members can also earn money by taking part in sponsored surveys.

This was the first example I had come across of an association using technology to create a significant and profitable revenue stream from facilitating member conversations.

Interestingly 'sermo' is Latin for conversation.

Clarity and engagement keys to success

To be relevant to a community or sector, associations need detailed research into what members want and value, have a compelling and clear vision of your preferred future and provide engaging opportunities for people to form meaningful relationships around common self-interests.

Ideally, members should be able to customise their membership so it fits their individual needs and you don't send them what is not relevant. This requires having the right technology and processes in place to deliver a personalised service. By looking at what they turn off you can build a detailed picture of what is valued.

The next best option is to segment your membership and build detailed profiles about each group. There are many ways to do this. A few years ago Sports England segmented adults interested in participating in sport and you can take a look at what they developed online (<https://segments.sportengland.org/querySegments.aspx>).

Your vision should motivate staff and members and guide everyday decision making. Unfortunately many are very wordy so few can remember them, they are not motivating or not inspiring. Some vision statements are actually missions, and vice versa. A captivating vision will be essential in the future as the younger generations follow causes, so by aligning with something that appeals will mean they are more likely to show an interest in belonging.

Finally, getting the right relationships in place will be key to being relevant. I believe that associations need to de-emphasise membership and develop other ways to connect with their community and stakeholders.

I am concerned that the idea of traditional membership does not have the same level of appeal to young people, so we need to develop other ways they can associate with us. Below is a list of some of the different relationships associations could offer.

Activist	Customer	Messenger
Admirer	Donor	Owner
Academic	Fan	Participator
Ambassador	Follower	Partner
Advocate	Friend	Patron
Armchair supporter	Fundraiser	Sponsor
Benefactor	Helper	Stakeholder
Builder	Influencer	Supporter
Carer	Insider	Visitor
Champion	Leader	Volunteer
Collaborators	Learner	
Sue Froggatt		

National Trust uses storytelling strategically to make deep connections

A big problem today for every organisation is breaking through the clutter and getting your messages through in a way that engages members, excites them and makes them want to share and pass the message along to others.

One of the associations I have been watching that has achieved this is the National Trust (UK). They have strategically embraced the use of storytelling to craft messages that make deep connections to boost member retention

They tell four different types of stories to help people connect:

- Stories to inform and educate about the work they do and their history;
- Stories that emotionally engage with audiences via personal stories from staff, for example their gardeners - what they do (you can even go on a tour with them or see a demonstration), their expertise, and they delight in passing on their favourite tips;
- Stories that help people remember heritage, particularly hidden or lesser known stories; and
- Stories that inspire visitors to tell and share their own stories of how they have come to know and what they love about their favourite Trust property or place.

They try wherever possible to get people to tell their stories – who they are, where they come from and what keeps them visiting. They have also been successful in using stories to help raise funds for specific projects.

They are constantly striving to tell better stories. They are working with influencers, like family Vloggers. They learn what images people share, what they like to talk about and how they share.

They also develop targeted stories for each group

segment, for example those interested in gardens or historic houses or walking in a specific area.

They engage people with photo challenges – to take a photo of their favourite views and share their story about why they enjoy visiting a particular place. They also offer adventure role play games via Instagram. For example, imagine you have just woken up in another life, what do you want to do next? People can tag their friends to come along on the adventure.

They try out other social media channels and formats, like Instagram stories, Facebook Lives for sharing videos and Facebook Canvas (gives you more space to tell a brand story).

The ultimate goal is to help members to use stories to help members feel differently about their membership and deepen their connection.

Approach to improving the member experience

Sue is hosting one-day workshops in Wellington, Sydney and Melbourne this October. Attendees will take away with them an approach – a generic journey mapping tool and process – they can use throughout the organisation to see what they do through the eyes of a member, volunteer leader or prospective member. This will help uncover opportunities to add value through the membership experience and also earmark what frustrates members so you can remove those situations which destroy value.

They will also practice drafting a Membership Experience Statement. The statement helps unite the organisation, so everyone has a clear understanding of what to focus on to ensure a consistent experience, regardless of the different touchpoints they use to contact the organisation.

Most associations today are focused on engagement and getting members to increase their level of activity. This workshop will move beyond this transactional engagement and deepen attendees' understanding of how to increase emotional engagement.

Learn more



The link to Sue's Membership Benchmarking Reports is available on the Answers for Associations website or from suefroggatt.com/resources/benchmarking

Sue Froggatt will be presenting one day workshops in Wellington, Sydney and Melbourne in October focussed on how to develop a process to more effectively create and deliver membership experiences that will ensure your members renew and new members are lining up to join. Book online at answers.net.au/events/

The other side of sponsorship

Julian Moore

In the last 10 years I have been living in Australia, working with associations mainly in Australia and New Zealand, I have seen them take immense strides in the way they are approaching sponsorships and partnerships. They are more strategic, more innovative and more focused on fulfilling needs or solving problems for the organisations they are approaching. But what happens when a prospective partner makes an approach to your organisation?

As corporates become more aware of the value of these alignments some are proactively creating programs to pitch to associations. But they are often coming up against brick walls, and there are two main reasons for this.

1. The corporate has a one-size fits all approach that fails to provide true value to the association and/or its members.

These programs are designed by product development and marketing specialists and look fantastic. But frequently they are all about driving revenue to the corporate in the guise of 'special offers' for members. The onus is on the association to promote the partnership to members for free - or worse, a monetary 'reward' is offered to the association for the privilege of doing the corporate's sales for them. The corporate is generally unable to articulate any tangible benefit for the association, and often no genuine benefit for the members.

Solution: Have a conversation with the corporate. Let them know what other organisations partner with you and the benefit they are getting. If they truly don't see value in your organisation and its members, walk away.

2. The association has internal barriers that prevent them from evaluating opportunities effectively.

Here are some common scenarios:

- The corporate is seeking national access to members but the association operates within a federated structure - each state has its own revenue targets and vested interests and there is no strong national lead. I have heard these structures described as "where opportunities go to die".

Solution: Merge into a national body! But in the meantime, find the key people in each state and come up with an approach to evaluate and

share revenue before it becomes an issue - you don't want to leave the corporate waiting while you negotiate internally.

- The association doesn't have the capacity or resources to implement the program in the way the corporate prefers.

Solution: Again, this is a conversation. Be upfront about what you can and can't deliver and what financial or other support would be required.

- The association is unsure about what value the offer represents.

Solution: Sometimes you need to do a little bit of maths. While I am a proponent of pricing based on the value to the sponsor, you do also need to make sure that a sponsorship is profitable. Jot down a list of activities that would be required to fulfil the sponsorship obligations, the cost of these exercises and how many hours of work they represent. Then work out whether the offer is valuable to your members? (Call and ask a few of them.) Does the partnership give members access that makes their membership fees more valuable to them? Also, remember that the corporate has made the effort to contact you - they know your value!

Insights from wineries

Wine Industry Suppliers Australia surveyed a number of wineries earlier this year to gain some insight into their sponsorship programs, also including donations to charitable events. It provides some interesting insights including frequency of request (most commonly weekly), best time to approach them for sponsorship (April-September), and the type of sponsorship they are most interested in (annual partnerships or event series) and the benefits they'd like most to receive (access to potential customers, wines on pour, exclusivity). It's an interesting read and available for download from wisa.org.au/resources.

Learn more



For insight into how to improve your sponsorship or partnership program contact Julian Moore at SMS* on +61 (0)401 648 533, email julian@smsonline.net.au or visit smsonline.net.au.

Using webinars successfully

When it comes to engagement strategies and learning programs, webinars offer a level of cost-effectiveness and geographic reach that is second to none. The role they can play from lead generation through to member retention and education programs has seen webinars increasingly become a go-to tool in associations' communication plans. However, they are not always as successful as they could be. *Answers for Associations* spoke to digital communication expert **Sara Gonzalez** about a recent survey which pinpointed ways to make your webinar program more successful.

"The State of Webinar Marketing 2019 report aimed to find out how and why marketers plan, manage, execute and evaluate webinars," Sara said.

"One of the key things the survey found is that organisations are using webinars more often, for different purposes and aimed at different audiences."

Findings from the survey show that organisations are beginning to develop more strategic, planned webinar programs instead of taking an ad hoc approach – around 70% consider webinars a key part of their marketing mix. This allows them to attract and grow an engaged audience over time. More than two-thirds of the survey respondents ran at least six webinars across the year.

Existing customers were the largest audience for survey respondents (71%), however prospects (45%), employees (39%) and partners (28%) were also targeted. The main purpose for webinars was lead generation (26%) followed by engaging customers and improving retention (22%).

"People are working differently now and that is why webinars are excelling – they accommodate the modern marketer and, if done properly, can be the most effective lead generation tool available.

"However, there are a number of opportunities for improvement to maximise the outcomes of webinar programs," Sara said.

Tips to create a successful program

Be strategic

"The most effective webinar programs are an integral part of an organisation's marketing strategy - they are planned around your association's strategic initiatives and become an extension of your content plan," Sara said.

Make the most of your opportunities - repurpose content and allow attendees to view on demand

"Once your webinars are recorded, you can edit the video into bite-sized chunks and share these through other marketing channels in order to drive demand," she said.

"Content can be used in written forms and vice versa. I think we are wasting amazing speakers, content and opportunities by not repurposing as much as possible."

The survey found that only 73% of webinar hosts ensure their webinars are available after the live event. But with the explosion of on-demand services such as YouTube and Netflix this is something that customers increasingly expect and therefore represents an opportunity.

Measure engagement to measure success

"Twenty-four per cent of respondents were running webinars as part of their lead generation campaigns, yet only 13 per cent said their programs were successful," Sara said.

"A huge part of this is due to the fact that the majority of respondents measure the success of their webinars by number of registrations (68%) and number of attendees (74%). There seems to be more of a focus on platform features rather than using the amazing data that is available to nurture leads through the funnel. Your platform analytics can tell you how people are interacting."

Engage your team to work together

"Organisations also need to resource more effectively. We found that it takes three to four weeks on average to plan a webinar and get it to market, and that can take anywhere from two to eight people involved in the planning and delivery process – creating the marketing material, assets, campaign, delivering the event. That's because successful webinar organisers know that they can't plan in silos."

Learn more



Contact Sara Gonzalez at Redback Connect - call +61 (0)2 8014 5153, email Sara.gonzalez@rdbk.com.au or visit redbackconferencing.com.au. The survey is available to download at redbackconnect.com.au/resources/state-of-webinar-marketing-2019/



Tools we love right now

This is a selection of apps and online tools that we use ourselves or have been recommended by association leaders.



Otter transcribes speech in real time – this app is a life changer if you're taking minutes, interviewing, or just wanting to take down some ideas in a hurry.



Monday is great for getting organised – you can use it for yourself or for your team.



Time Intersect is a handy app for those of us who arrange meetings and events across different time zones.



Meeting Cost is an app that tracks minute-by-minute how much your meeting is costing. Very motivating – and useful for meetings that go on for far too long.



Canva allows you to create beautiful designs relatively quickly and easily at very little to no cost, plus you can share designs with your team.



Survey Monkey is a long-time crowd favourite for building surveys, collecting and analysing data, and creating reports.



Answer the Public is great for creating content ideas – type in some keywords related to your organisation and it will show you what questions people are asking online



Fiverr allows you to access a global marketplace of freelancers across graphic design, translating, animation, voiceovers, marketing, programming and more.



Commtract provides access to a marketplace of communication experts from across Australia and New Zealand – they vet their 3000+ experts who cover marketing, public relations, government relations, copywriting, content creation and more.

*Do you have a favourite app or online tool that helps you?
Let us know at pr@answers.net.au. We'd love to share!*

Creating an incredible member experience

Join UK membership specialist Sue Froggatt at this one day workshop to learn how to develop a process for more effectively creating and delivering membership experiences that will ensure your members renew and new members are lining up to join.

"It was really useful to be able to structure and map a member journey and visualize it."

Phillip Badger,
Membership Development Manager,
Royal British Legion

Wellington 25 Oct | Sydney 28 Oct | Melbourne 29 Oct

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Book online at answers.net.au/events/

What our attendees have said:



"An incredible couple of days to work with peers, like-minded CEOs, on all things associated with association management, from events to advocacy, to all of the key items. It's been an incredible experience to actually be out of your comfort zone while being very comfortable with your peers. A very unique experience and I would recommend it to anyone to attend this event!"

Lindsay McGrath, CEO, Swimming Pool & Spa Association of Australia

"I found my tribe"

Samantha Hunter, CEO, Occupational Therapy Australia

"They say if you're the smartest person in the room, you're in the wrong room. I feel like I've been in the right room this whole time."

Karla Jones, Partnerships Advisor, Australian Indigenous Doctors' Association



Come along to find out what they say next!

Answers for Associations' Association Leaders Retreat: Summer Program

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Out and about

Email your photos to pr@answers.net.au



Top row and second row: out and about at the AuSAE Conference and Exhibition in Brisbane. Photos courtesy AuSAE and Oneill Photographics.

Other photos: out and about in Darwin for the Answers for Associations Association Leaders Retreat.



On the couch

Our panel of experts will tackle the problems that are keeping you awake at night.

Your question this issue: Does your association use bonuses as an incentive for staff performance?

We do use bonuses across some portfolios and for executive roles. I know some staff really love the challenge of stretch goals and as long as you have specific measures and matrix around the achievements I am happy to provide the incentive where the benefit to the business is clear. Other staff value additional leave or specialised professional development. I think open communication and a collaborative culture enables all staff to feel able to negotiate what a bonus or benefit looks like to them.



Samantha Hunter
CEO, Occupational Therapy Australia

I worked extensively on this issue with a HR psychologist a few years ago and have been getting rid of bonuses (and formal performance reviews) ever since. All are plagued to be a negative influence on performance and engagement, rather than motivating as is usually thought. Straight business development and sales roles are the only exception. This is not only the case for the NFP sector but commercial as well.



Megan Motto
CEO, Governance Institute of Australia

We use a self-funding model. For example, engagement is greater than the minimum attendee target and the net profit is greater than the budget then there is a bonus based on additional attendees – or it could be based on exhibition space. Each event has its own targets based on where the association needs to focus attention. The goal is to work away from a bonus system.



Lindsay McGrath
CEO, Swimming Pool and Spa Association of Australia

Have a problem keeping you awake at night? Want to join our experts on the couch? Email pr@answers.net.au





ASSOCIATION ANNIE

By *Belinda Moore*



For more Association Annie subscribe to Belinda Moore's newsletter at smsonline.net.au

Upcoming events

Governance in the Digital Age: What this means for associations

Megan Motto, Governance Institute of Australia;
Dottie Schindlinger, Diligent;
Sue Forrester, National Veterinary Care

There has never been a more challenging time to serve on a Board than right now.

Join Megan Motto, CEO, Governance Institute of Australia as (facilitator); Dottie Schindlinger, Vice President of Thought Leadership, Diligent; and Sue Forrester, Chairperson, National Veterinary Care as they discuss the six key areas where Board roles, responsibilities, and processes are evolving: Value Creation, Resilience, Risk Management, Strategy, Sustainability, and Personal Accountability.

During the discussion they will discuss ways Associations can navigate a world of increasing unpredictability.

Webinar 4 Sep | FREE EVENT

Developing an Effective Membership Strategy

Belinda Moore,
SMS*

Learn the fundamental concepts and skills necessary to recruit and retain members, create and deliver a value proposition, and remain relevant in the rapidly changing world of membership.

In this workshop, you will learn the fundamental concepts and skills necessary to recruit and retain members, create and deliver a value proposition, and remain relevant in the rapidly changing world of membership

"I have been a participant at two talks by Belinda Moore. I found Belinda's subject matter expertise, delivery, and preparation excellent and well worth the time spent listening. Importantly everything shared was relevant and a valuable learning exercise for me."

Glen Stanaway, Sport Services Manager at Yachting Australia

Melbourne 12 Sep | Sydney 13 Sep | Auckland 19 Sep

Creating An Incredible Member Experience

Sue Froggatt,
Sue Froggatt Training and Consulting

Join UK membership specialist Sue Froggatt at this one day workshop to learn how to develop a process for more effectively creating and delivering membership experiences that will ensure your members renew and new members are lining up to join.

The latest way to improve recruitment, retention, engagement and loyalty by focusing on the membership experience. The membership experience is a critical component of your membership strategy. It will give you a comprehensive understanding of the critical factors that impact on the membership experience.

"It was really useful to be able to structure and map a member journey and visualize it."

Phillip Badger, Membership Development Manager, Royal British Legion
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Answers for Associations

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