Associations Evolve

2024 & BEYOND

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Contents

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From the
Editor

When I sat down to write the introduction for the 2023 edition of the Associations Evolve Journal last year, ChatGPT had yet to take the world by storm. AI was still mostly science fiction – certainly not something we could envision entering our daily lives so quickly. Yet in the span of a single year, the onset of new AI technologies has profoundly changed workflows, enhanced efficiency, and opened doors to insights we never imagined across industries.

For associations, the implications are enormous.

The pace of technological change and disruption seems to increase exponentially each year. Associations must remain agile and adaptable to harness innovations while staying grounded in their core purpose and values. The leaders who embrace this adaptability, while holding fast to the timeless foundations of community, belonging and service, will be best positioned for the future.

As we publish this third annual edition, supported for the third consecutive year by our wonderful partners at Northern Territory Business Events, associations stand at the precipice of a new era of technological possibility. One where the potential of AI, automation, data analytics, and virtual and hybrid event technologies have only just begun to be explored.

The potential positive impact we can create for our members and the communities we serve is incredible.

This journal is designed to showcase the latest thinking and insights from experts around the world on the topics about which they are most passionate. Within these pages, insights, and ideas from association experts around the world – you'll find thoughtful discussions on membership engagement strategies, governance models, leadership development, diversity and inclusion efforts, sustainability initiatives and more. Their ideas, innovations and best practices are shared in the hopes of sparking new possibilities that you can apply within your own organisations.

While each association's journey is unique, knowledge sharing across regions, sectors and specialties allows us to learn an incredible amount from one another. In this journal, you'll notice that we've retained each author's local spelling to honour the diversity of contributions from around the globe, maintaining authenticity to their individual voices.

The association community thrives when we come together in this spirit of open collaboration and mutual support. I hope you find these articles informative, inspiring, and sparking new possibilities. That a new partnership, an improved program, an evolved mindset emerges.

I want to once again thank our returning supporters, Northern Territory Business Events. Their admirable commitment to nurturing the local association community and enabling this journal year after year does not go unnoticed.

I'd also like to thank those who have supported the development of this publication including our amazing range of authors and the content review team. Without your continued support, the publication would not be possible.

On behalf of the entire editorial team, we thank you for joining us on this continued journey of insight and evolution. I have no doubt that the topics explored in this edition will become even more prescient in the years ahead. Here's to embracing the future, together.

Warm regards,
Belinda

Belinda Moore

Editor
Associations Evolve, 2024 & Beyond

From our
Partner

Now in our third year, Northern Territory Business Events is proud to continue its partnership with Answers for Associations and remains committed to facilitating meaningful connections for the communities in which we both engage.

We witnessed a strong return to in-person engagement at business events staged in Australia's Northern Territory in 2023. Our tropical capital city, Darwin, welcomed six international association conferences and provided a platform for delegates to share global expertise and best practice in the health, resources, aquaculture and community sectors. Our iconic regions of Uluru and Alice Springs also had the opportunity to inspire delegates with stories of innovation, resilience and a strong connection to culture.

Pleasingly, we saw the delegate experience continue to evolve with visitors seeking connection beyond the conference. A recent delegate survey conducted in Darwin highlighted an increase in length of stay as well as a significant increase in the time delegates spend visiting regional locations such as the NT's dual listed UNESCO World Heritage sites of Kakadu National Park and Uluru-Kata Tjuta National Park.

Profound delegate experiences gained through cultural immersion and the wellness benefits arising from a restorative connection to nature also continue to resonate, as well as ways in which to engage with the community for a lasting legacy. These insights support what we already know regarding the immense value that business events deliver and the significant contribution they make to the economic development and social fabric of a destination.

We also anticipate in-person engagement will continue to grow at business events through the provision of safe, diverse and inclusive environments that appeal to delegates of all abilities. With this in mind, the Northern Territory's compelling brand proposition as a destination that is 'different in every sense for business events' will continue to evolve as a destination that is 'different for every sense for business events.'

On behalf of Northern Territory Business Events and our valued industry partners, I warmly welcome you to visit the Northern Territory in 2024, and beyond.

Warm regards,
Rebecca

Rebecca McCaig

Director
Northern Territory Business Events

P.S. The Northern Territory Business Events Support Fund continues to play a significant role in both attracting association conferences and sustaining our local business events community. To learn more and to apply, please visit ntbusinessevents.com.au.

Digital ecology – leadership in the age of AI

Sherry Budziak ■

Congrats! You're the CEO. Whether you've been in the big chair for years, or just reached your dream destination, don't get comfortable. "Stuff" is coming your way. I don't know exactly what your "stuff" will be, but I promise surprises are part of the package.

No leader expects an easy ride. The challenge is part of the fun, right? But I doubt that when you began your journey up the ladder, you imagined that the top would be this precarious.

Several years ago, my business partner Kevin Ordonez and I, wrote two books. Our goal was to help association professionals navigate a new technological era or Industry 4.0. Our research included interviewing thought leaders, organizing think tanks, and surveying professionals. Association 4.0 leadership is how we christened the skill set we identified for success in digital markets.

When we began that project in 2017, we knew business was changing quickly. But we didn't anticipate a pandemic that would force every association to become conversant in digital solutions. Nor did we imagine that the bot twins, ChatGPT and Bard, would burst on the scene to introduce us to a new way to consider thinking.

We don't have to rename our playbook Association 5.0 yet. The leadership qualities we identified hold. In fact, the rapid emergence of artificial intelligence puts those concepts in bold, followed by an army of exclamation points.

In an age when one innovation transforms entire industries, it has never been more hazardous to be at the head of a professional organization. The flip side of that warning is that it has also never been as exciting. The following recommendations from our research are designed to weigh the scales toward exhilaration and keep disruption at bay.

Lead with Humanity

AI will redefine the way we describe great leaders. If you think you occupy the top seat because you are the expert, you're traveling down the wrong track. Someone smarter just blew into town. Don't compete.

Look to the human skills to increase your stability and value. Collaborative relationships are the future's currency. Use empathy, mentorship, and trust to forge the alliances you need for success in an interconnected world.

Sundar Pichai, CEO of Alphabet and Google, made this comment. In the age of AI, "Leadership will be about setting the right questions, rather than just finding the right answers."

That is profound wisdom. An Association 4.0 CEO's job is to be the most inquisitive person in the room. To succeed, you'll need these skills: self-awareness to understand what you don't know, curiosity to study the business landscape, and humility to learn from unexpected teachers.

In the age of humans as a lesser intellect, curiosity will keep associations moving at the speed of invention. When you cultivate the zeal for discovery and use innovation like an entrepreneur, your example ignites that excitement across the organization.

Hitch Curiosity to Possibility

A strong technology infrastructure unites curiosity with possibility. In the past, the geeks in the IT department were the keepers of information that seemed esoteric. Today, no-code programming means that computers speak human. And, in an environment where every aspect of operations depends on digital capacity, leaders can't remain isolated from these tools. IT systems and platforms must integrate with overarching business strategies.

You must be the architect of a digital ecology that translates innovation into action. That means having a thorough understanding of your organization's IT strengths and deficits and an acute awareness of rising trends.

Marc Benioff, Co-Founder and CEO of SalesForce, describes the goal like this, "A digital ecology is a network of interconnected digital systems that work together to create value. It's about building relationships and trust between different players in the ecosystem, and it's about creating a shared vision for the future."

Engage Broadly

To promote that collective focus, engage employees across the organization. Identify staffers who will be ambassadors and fill these collaborative roles:

Strategists are visionaries, facilitators, and problem-solvers who inspire curiosity. Make them responsible for understanding technology trends. Task them with staying ahead of developments that improve products, services, and customer-centricity.

Innovators are rule-breakers and disruptors. They sweep away old thinking and stimulate curiosity. They are role models who inspire teams to see from a different perspective. Innovators and strategists complement each other's skills. They work together to make the leap from ideas to processes.

Drivers are pragmatists who keep strategists and innovators on task. They are knowledgeable about resources and have the skills to manage projects, develop budgets, create timelines, and communicate progress to stakeholders.

Fast Track New Technology

Use your ambassadors to fast-track tools, like AI, to manage your digital ecology. For example, these AI functions are wormholes to warp speed operations and efficiency, making you a formidable competitor in digital markets:

- **Member personalization and content:** Supercharge your ability to understand members' tastes, behaviors, and needs. Make them think you're reading their minds.

- **Predictive analytics:** Evaluate historical data to build stronger future strategies, construct SWOT analysis, engage in scenario planning, and develop objective rationales for future initiatives.

- **24/7 support:** Deliver round-the-clock support that never takes a break. AI chatbots give fast answers, provide guidance, and handle clerical processes.

- **Enhanced communication:** Target interest groups and send impactful messaging to drive higher engagement.

- **Data analytics:** Easily collect and comprehend member feedback. Immediately address concerns and improve the experience.

Seize the Options

Yes, "stuff" is coming your way. AI may even be the instigator of that disruption. Technology's domino effect can't be stopped. But you have options. Give your leadership skills a twist. Embrace the threat, discover its potential, then use that information to gain the advantage your mission and your members need for success.

Sherry Budziak is Founder and CEO of .orgSource, a management consultancy, and Co-Founder of .orgCommunity, a professional development organization and .orgWorx, a placement service. 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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Transition, transformation and evolution

Matthew Fisher PhD DHlthSt *(honoris causa)* ■

Is reinvention important? I was once told by a mentor that reinvention and evolution were important attributes of a CEO if you want longevity. They are a couple of survival techniques that are underpinned by many other attributes at a personal and professional level for CEOs in the association sector to have a fulfilling career.

"Change is the law of life. And those who look only to the past or present are certain to miss the future," John F. Kennedy 1963.

On reflection, I think that I have learnt more about myself and others in the almost 23 years as a CEO at three companies and as an on and off director at four organisations in a not dissimilar time frame. Who grows up wanting to be a CEO or director when considering life's journey? Not me, but it has and continues to be a rewarding ride given there has always been a for purpose aspect of professional success and the organisations that I have had the privilege to be with.

So, what are some of the reflections based on the appointments?

With my first appointment, I clearly remember the initial thought of "So what do I do now?" and not having developed a playbook but relying on existing attributes and having an organisation prepared to gamble on and invest in an untried key person.

The second appointment gained from the experiences of the first, both successes and failures, whilst presenting its own challenges at many different levels. Knowing when to walk away became an important learning from a career and personal perspective.

"Failure is success in progress," Albert Einstein circa 1922.

My current role has become a match at many levels –

values, contribution to the public, opportunity to develop and evolve a business, and the culmination of a playbook with many chapters, and more being written. Enjoy the journey, be professional but don't take yourself too seriously, reflect and evolve.

Executive education and development are important investments and having attended courses at both Harvard and London Business Schools, many learnings still resonate around change, culture and capability. Keep investing in yourself as we trade on our integrity and competence.

Transformation has many parts to it at the CEO level of a membership organisation. Has the Board got a sense of where it wants to lead the organisation and membership to, and does the governance structure enable that? What is the culture of the organisation and is it reflective of the role the members have in society? What is the internal culture of the organisation? Do the staff share the same values and culture, plus do they understand the shoes the member walks in? Is the organisation well-resourced and is the operational platform fit for purpose? Does the structure enable success to be achieved and do you have the right people with the rights skills and attitude? What is the operational environment of the organisation and how expansive is the sphere of influence?

"Attachment constrains our vision so that we are not able to see things from a wider perspective," Dalai Lama.

Transitioning into and transforming an organisation is an energising and consuming life event, so you shouldn't underestimate the impacts and the need for a safe space and network to be in. Distilling this down further, one of the more important things you can do is gain context to determine how you can add the most value and what is the timeframe for achievements along the simple to complex continuum of achievement. Importantly, be realistic as there is an "impressions window" which will enable your success.

Be curious, thoughtful and purposeful and bring people along the journey or consider re-directing them to another ride. Be open minded and take time to reassess initial impressions or previous experiences if they are applicable to the organisation you are leading. Build on a diversity of perspectives and challenge what is being presented to you, as this will enable informed decision making. In many respects, we have a window to set the scene and ideally, we aim to keep it open for as long as possible to enable success to be achieved.

Reflect on and establish your priorities through understanding expectations; ensure you develop a good understanding with your Chair and other key influencers. You are constructing your team and building relationships with key people are fundamentals for performance. John Kotter in his book, "A Sense of Urgency" talked about the "No No" people who say they are on board but block or undermine transition and evolution. Work out who is up for the new direction and those that aren't. Clear, consistent communication will help set your platform of expectation.

"It Always Seems Impossible Until It's Done,"
Nelson Mandela circa 2001.

My final comment would be to keep it all in perspective and as the old analogy states, when juggling, make sure you understand which balls bounce and those that break if dropped.

Matthew Fisher PhD DHlthSt (honoris causa) is the Chief Executive Officer of the Australian Society of Anaesthetists and a Director of Exercise & Sports Science Australia. He was appointed an Adjunct Associate Professor in 2013. He has been the CEO in three different healthcare associations since 2001 and previously worked in the healthcare and tertiary education sectors. Matthew has attended executive education at Harvard Business School and London Business School.

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Creating equity, inclusion and diversity in your association

Sharon Newport ■

Research across the globe has been telling us for decades that diverse and inclusive organizations are more creative, innovative, and successful in delivering sustainable solutions. Your association will be stronger by building equity, inclusion, and diversity across all levels of the association.

It is essential to learn about each of these three areas and determine why you will move in this direction, what those outcomes can look like over a select period, knowing that you will be doing this work indefinitely, and ensure it is customized to the context needed for your association and the profession or industry you represent.

Belonging

"One of the biggest surprises in this research was learning that fitting in and belonging are not the same thing. In fact, fitting in is one of the greatest barriers to belonging. Fitting in is about assessing a situation and becoming who you need to be in order to be accepted. Belonging, on the other hand, doesn't require us to change who we are; it requires us to be who we are."
– Brene Brown

Much of what associations are saying they would like to create is a culture of belonging. A culture of belonging sees one's unique qualities, attributes, and gifts, meets people where they are, and builds systems and approaches that are inclusive and equitable at all levels of the organization. Yet, we're struggling to get this done.

What is getting in the way of success?

Like all organizations, associations are led by humans with strengths, weaknesses, lived experiences, biases, and preferences. Creating a culture of belonging is the outcome of many years of work.

It's only something your members can tell you they experience, and it is not something you can declare otherwise. It is an earned outcome. Let's explore where to begin.

Change Begins with Leadership

"If there is no transformation inside of us, all the structural change in the world will have no impact on our institutions," *– Peter Block.*

We must begin with ourselves as leaders learning on this journey. The Chief Executive, the Board, staff, and other volunteers should take thoughtful and meaningful steps in this work. A mix of education and strategic discussions, as well as personal and systemic reflection, will help leaders and the organization start to see what they could not see about the impact of inequity, bias, or unintended consequences, igniting the flames for identifying change.

Additional promising practices for the journey:

- Become conversant in key terminology.
- Walk the talk.
- Be accountable.
- Know your data, demographics, goals, and why you're taking action.
- Measure qualitatively and quantitatively.
- Communicate and build with your members as you go.
- Partner with experts.
- Take a holistic approach.
- Discomfort is your ally.
- Avoid urgency.
- Cultivate courage.

- Cultivate joy and celebrate wins.

- Be a humble learner and listener.

For Many, This is Personal

If you ask everyone on your staff or your Board, "How is this personal for you?" it is likely that everyone will answer differently. You will hear stories about lived experiences full of pride or pain. Some may have stories about making mistakes and feeling fear, shame, or rejection; some will shut down or lash out. We might all feel many different feelings at different points. These stories are all part of being human while at work, especially at this moment. Let's take responsibility for our journeys first, including learning or unlearning, as we model the way for those we lead. Then, we can better show up as culturally sensitive, humble, and evolving leaders as we build associations capable of these same behaviors.

The Call to Act

"Hope is not naïveté. It is bearing witness to truth, still believing in better and yielding the energy to contribute to better." Bernice King, CEO of The King Center, Daughter of Rev. Dr. Martin Luther King, Jr.

Creating equity, inclusion, and diversity in your organization requires commitment, strategy, and skill. The results will strengthen your vision, mission, values, and ROI while bringing humanity forward for the organization and those it serves. This work will take time. This journey is infinite. I invite you to listen for the whisper of your courage and integrity to help you know if it is time to begin or escalate your journey. May you go forth and lead well.

Sharon Newport is an organizational consultant and executive coach specialising in culture, leadership, and transformational change. With 15 years of experience in the non-profit sector, she also serves as adjunct faculty at Georgetown University. Sharon holds multiple credentials, including a CAE designation, and has been recognised as a Leader of Distinction.

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The association leadership program using the '3Rs' framework

Octavio (Bobby) Peralta ■

One of the unique value propositions that associations provide their members is life-long learning for their profession, the industry, or both.

More so with rapid technological advancements, evolving industries, and constantly changing global landscapes, the saying that "learning is a lifelong journey" has never rung truer. It is a philosophy that recognizes the enduring significance of acquiring new skills, knowledge, and perspectives throughout one's career.

In my 30 years (and counting) of managing associations, the starting point towards learning development is to target first the core person in the organization and, for me, this is the association leader, i.e., the association executive.

In the realm of education, there are principles that stood the test of time, serving as the groundwork upon which knowledge and intellectual growth are built. Among these enduring principles are the "3Rs" of learning: reading, (w)riting, and (a)rithmetic – three foundational skills that have transcended generations, cultures, and technological advancements, playing a pivotal role in shaping the minds of people and societies.

In like manner, I have discovered through my years in association management that there are "3Rs" which are key to effective leadership: relevance, relationship, and resources.

Relevance: Navigating the Currents of Change

In a world characterized by high-speed change and innovation, relevance is the cornerstone of effective leadership. There are two considerations for being relevant: (1) purpose and mission, and (2) value proposition.

Purpose guides the organization and answers the question why: why does it exist; why it does what it does; and why does it serve a higher cause? On the other hand, mission drives the organization and answers the question what: what does it undertake to accomplish its purpose; what difference does it make; and what change will happen?

The value proposition of an association is how it actualizes and communicates serving the needs and expectations of its members that ultimately creates a compelling reason for members to join, engage, and support the association's purpose and mission.

Relationship: The Bonds that Foster Growth

Leadership is intrinsically tied to relationships, both within and beyond the association. Relationship relates to the interaction and engagement of the association, first and foremost, with its members and then with other stakeholders, e.g., partners, donors, regulators, etc. Effective member engagement plays a crucial role in promoting an association's core values and messages.

Resources: Empowering Leaders for Impact

Even the most talented leaders need the right resources to make a lasting impact for the association. There are three critical ingredients in relation to resources: (1) people (2) technology and (3) finance.

People include the Board, management and staff, members and volunteers. An organization, as we know it, is only as good as its people. In terms of technology and in today's 'new normal,' adapting and embedding technological advancements plays a significant role in member benefit delivery and operational efficiency.

Maintaining **RELEVANCE**

Board Management Bond

Building **RELATIONSHIPS**

Sustaining **RESOURCES**

The association also needs to generate revenue and produce a surplus to pay for member service delivery as well as for operational overhead. Prudent financial management and investment is key to its survival and sustainability.

Putting the Elements Together: Developing a Leadership Program Using the '3Rs' Framework

Putting together the three essential elements of relevance, relationship and resources, the Association Leadership Program consists of the following four (4) standalone program series as depicted in the diagram and as explained below:

Series 1: Maintaining Relevance

This series consists of four courses, namely, customer (member) service, the purpose-driven association, data and technology-oriented strategy, and unique value proposition development.

The series incorporates real-time industry insights, cutting-edge research, and expert-led discussions to keep participants attuned to the latest developments.

This inspires participants to explore global perspectives, encouraging them to draw inspiration from diverse cultures and ideas, broadening their outlook and enables them to lead with a global mindset, fostering collaboration and innovation on a larger scale.

Series 2: Building Relationships

This series is composed of four coursews: effective membership lifecycle, volunteer management, strategic stakeholder engagement, and creative collaboration. The series is aimed at facilitating knowledge-sharing, creating an environment where members can learn from one another's experiences, successes, and challenges, as well as mentorship programs to access guidance and advice from those who have walked similar paths. Additionally, associations can foster partnerships with academia, government bodies, and other organizations to amplify their impact. These alliances not only expand the reach of the association but also enable the pooling of resources, expertise, and perspectives to address complex professional and industry issues.

The association leadership program
using the '3Rs' framework

Series 3: Sustaining Resources

This series comprises of the following five courses: organizational development, people management, product and service development, revenue modelling, and financial management. The series covers topics on financial literacy, resource allocation, and strategic planning, understanding of financial statements, budgeting, and resource optimization, among others. The courses also provide access to a curated repository of industry-specific research, best practices, and case studies.

Series 4: Board-Management Dynamics

This series completes the "3Rs" leadership program with two courses on building a strategic-thinking culture and effective board-management relationship.

A Holistic and Practical Approach to Association Leadership Learning

The symbiotic interplay of relevance, relationship, and resources forms a comprehensive framework for developing exceptional association leaders. By integrating these principles into a leadership program, associations can create an environment that fosters forward-thinking leaders who are equipped to navigate change, build meaningful connections, and leverage available resources for lasting impact.

Affectionately called, "The Association Man," Bobby is currently the Executive Director of Global Compact Network Philippines, founder & CEO of the Philippine Council of Associations and Association Executives, and President of the Asia-Pacific Federation of Association Organizations.

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The evolution of strategic planning for associations

Belinda Moore ■

Strategic planning has long been a critical process for associations to chart their futures. But how strategic planning is undertaken has evolved considerably over the decades.

Once viewed as a rigid documented exercise, strategic planning is now a flexible, collaborative process focused on powerfully advancing the purpose of the association.

The Early Days of Association Planning

In the 1970s and 1980s, strategic planning was predominately a structured annual process for associations. Heavily influenced by the corporate world, early association strategic plans were formal, lengthy written documents.

The emphasis was on creating an impressive plan document. Common elements included SWOT analyses, growth forecasts, competitive scans, and detailed operational tactics. Plans were predominantly developed by boards and staff then presented to members. These plans quickly became outdated and didn't reflect member needs.

Yet as the volatile business landscape shifted, flaws in this approach emerged:

- Plans quickly became outdated, requiring constant revisions.
- The focus was on documentation over implementation. Follow-through was lacking.
- With limited input, plans didn't reflect members' needs and desires.
- The annual cycle couldn't keep pace with accelerating change.

Adaptations to the Planning Process

In response, associations adapted their planning processes:

- **More engagement –** Perspectives of members and other stakeholders were sought via stakeholder surveys, focus groups, and interviews allowed broader member input.
- **Action-orientation** – There was greater focus on execution and metrics over polished documents.
- **Digital connectivity** – Technology and social media enabled real-time feedback when developing the plan.
- **Leadership development** – Planning became a vehicle for developing leaders' strategic skills and knowledge.
- **Facilitators** – Outside experts guided productive, unbiased discussions.

While better, these adaptations still struggled with change. Enter the rise of strategic agility.

The Age of Agile Strategic Planning

In today's fast-changing, hyper-connected world, associations require agility to respond to rising complexity and uncertainty.

Modern strategic planning is not a single locked-in vision set in stone. Rather, it is a living, evolving process to guide decisions and actions.

Key elements of agile strategic planning include:

- **A north star** – A clear purpose and principles that anchor the organization.

- **Regular pulse-checks** – Continuous environmental scanning and sentiment analysis versus a single annual review.

- **Root cause analysis** – Uncovering and addressing underlying issues versus symptoms.

- **Dynamic resource allocation** – Adjusting resources based on evolving priorities and results.

- **Iterative approach** – Constant review cycles and real-time adjustments.

- **Focus on activation** – Equipping and empowering people to execute and adapt plans.

- **Openness to restructuring** – Assessing and reconfiguring operations and models to optimize execution.

Perhaps most crucially, strategic plans are now seen as living documents rather than static multi-year decrees. Associations must build strategic agility skills to thrive in turbulence.

Top Tips for Association Strategic Planning

Based on the evolution of strategic planning, here are tips for associations undertaking the process:

- Engage a diverse group of internal and external stakeholders for a 360-degree perspective.

- Communicate early and often. Ensure two-way transparency throughout the process.

- Analyse emerging trends, competitive forces, and the changing landscape.

- Discuss potential scenarios and options, not just a single vision.

- Be willing to question existing models and structures if needed.

- Develop execution roadmaps with metrics and accountabilities.

- Build in agility through regular pulse-checks and real-time adjustments.

- View planning as an ongoing leadership development and community engagement tool.

- Limit written documentation to essentials for alignment and execution.

- Cascade elements of the plan throughout the association to empower staff and members.

By evolving their approach, associations can make strategic planning a driver of engagement, innovation and incremental improvement while advancing their purpose.

The power of the pivot

Gihan Perera ■

You might remember the word 'pivot' got a bad rap during the pandemic. Some people with no business experience were urging struggling businesses to instantly switch to a new market, platform, or product – as if that would rescue their business overnight. For a business in crisis at the time, it was poor advice. But it doesn't have to be that way. In fact, pivoting can be a simple way to generate value, and often offers high return on investment. Done right, a small change creates massive opportunities.

Here are seven pivots to consider for your association.

1. Market Pivot

How could you offer your association's expertise, products, and services to another market, or even a different segment in your current market?

For example, after Mark Zuckerberg built 'Facebook to connect university students', he planned to expand it into high schools, but eventually chose a wider market: everybody!

In the association space, an example is the Adventure Travel Trade Association (ATTA), which was initially focussed on adventure travel companies, but launched a 'Professional Membership' option in 2020 to capture the growing interest of individual adventure enthusiasts seeking a community.

2. Demand Pivot

How can you adjust your products, marketing, or brand to tap into a change in your members' needs or wants?

For example, the customers of Swedish clothing store H&M started demanding sustainable practices from their favourite brands, so H&M created the Conscious Collection.

Many associations pivoted during the pandemic to offer online meetings, events, learning, and other resources. Now, on the other side of the pandemic, recognise that your members have changed – sometimes in less obvious ways than an enforced lockdown – and ask them what matters to them now.

3. Side Pivot

What side products (such as accessories, optional extras, or 'freebies') do members value – sometimes even more than your main product?

For example, in the early twentieth century, William Wrigley included free packets of chewing gum with every order of baking powder. To his surprise, he discovered customers wanted the chewing gum more than the baking powder – and Wrigley's chewing gum was born.

The National Geographic Society began as a society for geographers and explorers, which just happened to produce a high-quality magazine. The magazine took the association into the mainstream, and many 'ordinary' people join now primarily for the magazine.

4. Focus Pivot

What features of your product do members use and value the most?

For example, Kevin Systrom and Mike Krieger built a 'meetup' service Burbn, but it was too complex. They stripped it down to its most popular feature – photo sharing – and renamed it Instagram.

The Australian Dental Association primarily provides advocacy, education, and resources for dental professionals, but found their resources about teeth health resonated strongly with the public. Recognising this opportunity, they created an annual public health campaign, Dental Health Week, which has become a significant public interface for the association.

5. Process Pivot

How could you apply your systems and processes (such as supply chain logistics, supplier partnerships, customer base, and brand) to other markets and products?

This often takes the form of diversifying into other products, like Japanese e-commerce company Rakuten, which started as an online marketplace for books, and later diversified into clothing, sporting goods, travel, and real estate.

It can also mean diversifying to new markets, such as the Australian Institute of Company Directors (AICD), which leveraged its knowledge to cater to a broader range of professionals interested in governance competencies, not just those serving on boards. This broadened their member base and extended their influence beyond the current company directors' circle.

6. Digital Pivot

How can you leverage digital tools to replace, automate, enhance, and improve your customer experience?

For example, we know Nintendo now as an electronic games giant, but for almost 80 years, it sold handmade playing cards, before pivoting to digital in the 1970s.

As noted, many associations were forced to shift to digital offerings during the pandemic. Now, without that imperative, it's tempting to slow that transformation, but the best associations will continue to find new digital opportunities – with AI, virtual reality, more personalised offerings, and more.

7. Perspective Pivot

If your entire leadership group was replaced by outsiders, what would they immediately see and change?

For example, LinkedIn was primarily a service connecting job seekers with employers, until Microsoft bought it in 2016 and expanded it into a more comprehensive social media platform for professionals.

There are many examples of associations that transformed from a change in perspective – such as the European Cyclists' Federation (which changed focus from leisure cycling advocacy to sustainable urban planning), Museums Australia (which expanded its scope and appeal, and is now the Australian Museums and Galleries Association), and the Australian Recording Industry Association (ARIA, which changed from an industry advocacy group to preserving and promoting the cultural importance of Australian music).

Which of these seven pivots could you and your leadership team consider for your association?

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Strategic frameworks at the future

Lowell Aplebaum ■

Mission-based associations play a vital role in achieving collective objectives and responding effectively to societal challenges. However, the rate of disruption in recent years has necessitated a re-evaluation of strategic frameworks and their alignment with rapidly evolving realities. Concordantly, successful associations are embracing a transformative and more nimble nature of strategic planning, exploring the shift from long-term plans to shorter strategy time horizons driven by the need for agility and adaptability.

Strategic Frameworks Are the Future

The evolution of strategic planning has led to the emergence of strategic frameworks as a more flexible approach. Traditional strategic plans, with extensive documentation, often became obsolete due to changing priorities. In contrast, strategic frameworks offer a modular and simplified approach, comprising three to five overarching goals tied to mission, vision, and values. These goals provide a systemic and adaptable foundation for operational activities. By streamlining the planning process, strategic frameworks foster creativity, innovation, and alignment among stakeholders.

Strategic Thinking is a Process, Not an Event

First, leaders need to establish a strategic culture, assign roles and responsibilities, and prioritize thorough preparation. Future forecasting and knowledge gathering should constitute most of the effort, with collaborative retreats representing a smaller part. Understanding major trends and drivers of change, employing scenarios to explore transformative shifts, and involving critical audiences in strategy development, underscore the value of feedback and ongoing dialogue to ensure strategy remains relevant and actionable. By adopting this approach, organizations can effectively address challenges and align their vision with the needs of their stakeholders.

Wise Use of Strategy as a Tool

By providing a clear and specific framework, strategy serves as a guiding force, empowering volunteers, and staff to adapt and address evolving member needs while staying true to the organization's mission. Strategic conversations facilitate the identification of key issues, foster innovation, and manage expectations for implementation speed. Organizations lacking a clear strategic focus often struggle to prioritize effectively, resulting in scattered efforts and diminished impact potential. By embracing strategic frameworks, communities can align their priorities, navigate disagreements, and channel emotions towards shared passions and community accountability. The continuous process of strategy development ensures that change is approached collectively, transcending individual interests and promoting resilience in a rapidly changing world.

Alignment is the Secret Sauce

Alignment within organizations — that encompasses all operational elements — requires a strategic framework that clearly defines the "why" while developing the "how" and the "what." Achieving alignment involves ensuring that individuals understand the purpose and priority of organizational goals and recognize their unique contributions and value within the organization. Key elements such as governance structure, bylaws, policies and procedures, budget and finance, staffing, and infrastructure should be reviewed when implementing a new strategic framework. By aligning these elements with the strategic framework, organizations can rally together and propel towards their goals.

Strategy is the Great Mediator

A strategic plan is a crucial tool for effective decision-making within organizations. With a clear framework, the strategic plan acts as a mediator, guiding the alignment of ideas with organizational objectives and enabling

better judgment. This framework not only facilitates saying "yes" or "no" to new ideas but also allows for deferring decisions and eliminating outdated legacy programs. Furthermore, a well-articulated strategy aids in managing the expectations of elected leaders, shifting the focus from personal agendas to advancing the organization's goals and serves as a roadmap for building leadership legacies and achieving success as defined by the strategic framework.

Not All Metrics Matter

While metrics matter, strategic plans should focus on the core purpose of an organization, specifically on who they serve and how they serve them. Strategic goals must go beyond desired outcomes to identify actionable strategies for achieving those outcomes. Organizations need meaningful metrics tied to operational plans yet should caution against overly complex reporting systems that hinder decision-making. Leaders should seek a shift in perspective, where metrics serve as tools to support strategic decision-making rather than becoming the primary focus of the framework.

Impact Radiates Beyond the Membership

Organizations would benefit from setting strategic goals that go beyond serving association members, emphasizing the value of impacting the entire industry or profession. By providing thought leadership, modeling best practices, and prioritizing diversity, equity, inclusion, and accessibility, associations can influence the wider sphere and inspire others to implement similar policies. Incorporating data gathering and future forecasting enables early trend identification, facilitating member preparation through education, public policy engagement, and workforce development. Additionally, exploring new market segments can enhance community inclusion and industry relevance.

The Pivot is the Point

Strategic frameworks enable organizations to navigate and adapt to poly-crisis situations. Following the global COVID pandemic, leaders understand the need for flexibility and nimbleness — advocating for a shift from detailed strategic plans to a focus on continuous learning, empowered executives, and alignment of operational plans with the overarching strategic framework. By fostering a culture of risk management and scenario planning, organizations can proactively respond to disruptors and view crises as opportunities for innovation.

Communication is Key

The strategic framework serves as a primary communication tool to convey the allocation of limited resources and decision-making rationale. By integrating the plan into board meetings and board member orientations, it maintains focus and prevents diversion. Furthermore, it fosters transparency, facilitates volunteer engagement, and aids in resource allocation.

Leaders should align marketing and communication efforts with the framework's goals to reinforce member benefits and attract new members. While traditional communication channels are valuable, interactive events and personal interactions prove more effective in conveying the strategic framework's message. Authentic communication should showcase achievements, acknowledge volunteers, and connect the framework to member empowerment.

Advice From C-Suite to C-Suite

Key advice from C-suite executives on strategic planning include the importance of strategic thinking, setting clear priorities to optimize resource allocation, significance of timing, and tailored approaches based on the board's readiness. Additionally, embrace strategic planning as a meaningful and collaborative process, while involving third-party experts for unbiased perspectives leaving C-suite leaders to drive transformational change within their organizations.

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Association intelligence:
The AI no one's talking about

Martin Sirk ■

Unlike the centuries-long spans of the agricultural and industrial revolutions and the decades-long gestation of their digital cousin, the AI revolution will forever be linked to a single year: 2023. Before this point, AI belonged to a clique of nerds and visionaries; almost instantaneously, we are now all AI users and "experts", debating the relative aesthetic merits of Midjourney and DALL-E, applying ChatGPT routinely to our writing tasks, fending off sales calls from swarms of "prompt-optimising agencies", holding forth on the biases of facial recognition and the ethics of deep fakes, losing sleep over the future of white-collar jobs and existential risks to humanity.

Associations, naturally, have been drawn into this society-wide tsunami of interest, some evangelically, others more reluctantly. There's universal recognition that AI is going to radically change business models, increase competitive pressures, offer efficiency savings, and upend risk calculations. Members are going to adopt AI anyway, so associations can't afford to fall behind. Boards are going to demand more and more position papers, investment strategies and radically revised competitor analysis. And AI success stories by companies are going to inspire copycat behaviour by associations, as is always the case.

But there's a danger amidst this frenetic activity, as the black hole of AI sucks in management and Board attention and resources, that another kind of (low-tech) AI is entirely ignored or disparaged: for short, let's call it "Association Intelligence".

The many facets of this unique AI can be grouped together under four headings:

1. Objective Authenticator

Associations are in a unique position to be certifiers of skills and intellectual abilities, and curators of facts and objectivity within their fields of specialisation. Not tied to national agendas and free from the institutional self-interest of universities, international associations have the best opportunity to take on these roles on a global scale. Many already aspire to make these claims; others should consider raising their ambitions.

2. Safe Platforms

There has never been a greater need than today for places where civilised disagreement and debate can take place, supported by a foundation of agreed facts and informed referees; nor for activities that can act as catalysts and crucibles for new emergent knowledge, perspectives and understanding, for challenging calcified thinking. Thankfully, association events and community interest groups are the perfect concepts for such vital platforms to operate, even if they are not consciously designed in this way by default today.

3. Tacit Knowledge

This is perhaps the least understood asset that all associations possess: the aggregate knowledge, know-how, experiences, and intellectual muscle-memory of their members. Nurturing this deep reservoir and finding ways for tacit nuggets of value to be exchanged within and beyond the community, should be one of any association's top priorities. But mainly this process happens in the liminal spaces within the programme of association activities: in private conversations, offline catchups, through serendipity; far removed from the typical plans and strategies that focus on more tangible and manageable forms of knowledge.

4. Community-wide Trust

Trust is the glue that holds the other three elements together. Trust between members and the association, and trust between the members themselves. Without trust, certifications will be devalued, authentications disowned, platforms misused, and tacit knowledge squandered. With trust, amazing collective outcomes are possible.

We are sprinting into an era where dis- and misinformation will become noxiously ubiquitous, where it will be virtually impossible to differentiate between genuine images and deep fakes, between facts and fiction, legitimate companies, and invented entities, to the extent that within a decade, today's information environment will probably appear to have been a "golden age". Governments and companies and institutions alike will all face crises of confidence. This is why it is such an opportunity for associations to fully exploit their natural, association intelligence assets, to become a breath of intellectual fresh air.

But this will not happen automatically, without hard work and new strategic perspectives, and (of course) without applying resources and staff time. Because these assets are regarded by many associations as "natural" or "just there", it is not widely understood that they can be proactively managed and developed.

At the very least, every association's Board should add these issues to their "strategic opportunities" agenda as a matter of urgency. The good news is that this kind of AI requires no major investment in new technology, but it does need some serious thinking.

Artificial intelligence is inevitable. Association intelligence depends on us taking action.

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The life-centric association

Shelly Alcorn ■

Things don't feel quite the same these days.

It is a familiar refrain expressed in plaintive posts on TikTok, whispered in conversation paired with coffee or alcohol, or some other beverage of choice between friends, family, and colleagues. You peer intently into the 21st century landscape and you feel a growing sense of unease. There is something you can't quite see in your peripheral, something you can't quite hear echoing off a distant hillside. Something old, something ancient, something our earliest ancestors would have recognized as a distant early warning.

Maybe the pandemic ripped off the blinders. Maybe it's late-stage capitalism. Maybe it's the slow realization that we are in a suicide pact with a fossil fuel driven energy system that we require to run the air conditioners meant to save us from the heat domes being created by that very same energy system. Maybe it's the imminent birth of a new intelligence that will be as alien and superior in intellect to us as we are to ants. Maybe it's the fact that war rages on despite our vaunted claims of civilization, or the fact that we took the laws of nature themselves and created world-ending technology in the form of atomic weapons that world leaders casually use Twitter to threaten each other with.

The fact is every generation says it's the end of the world but eventually one of them is going to be right.

If the science is correct, this time it might really be us.

What is the new association story we need to create and tell?

Associations are a unique feature of American life. According to a report from the Pew Research Center in 2011, "The Social Side of the Internet," 75 per cent of Americans are involved in a community or social group of some sort, and 20 per cent of those are trade associations and professional societies. American Society of Association Executives' (ASAE's) Power of A campaign estimates that 1 in 3 Americans are part of the association community as employees, members, or volunteers.

That's 110 million lives. That's not even counting the lives those people support – children, pets, elderly parents. 110 million people of all economic strata's, ethnicities, genders, and geographies. 110 million people whose homes are at risk from extreme weather events, whose lives are increasingly at risk from food shortages and dwindling freshwater supplies. 110 million people who are potentially facing massive job losses from the rapidly advancing field of artificial intelligence.

110 million lives that you hold in your hands.

Now what?

The Problem with Systems

Before we can get to 'what,' we need to understand the predicament of 'now.'

Until now, everything we built, we could control. That includes the atom bomb, every other piece of technology, and the entirety of the infrastructure in our built environment. Everything we took from the natural environment in terms of animals, insects, plants, and water we thought the earth could regrow, rebirth, or replace through mysterious processes that lulled us into the myth of inexhaustible supply. We thought we would never stop finding enough gold and copper to string around the earth on the skeletons of the trees like some behemoth Christmas tree lighting up our corner of the galaxy. We certainly never thought our activities could break the planet's climate system, nor did we ever think we could break something that we couldn't somehow fix.

It isn't as if we were not warned. We simply chose not to listen.

Even the things we thought we could control are being wrested from us as the threats compound on each other. According to a recent report from the Carnegie Endowment for International Peace, "How Climate Change Challenges the U.S. Nuclear Deterrent," the threats from sea level rise, extreme temperatures, and extreme participation are putting capability and reliability in question. In the same breath, the U.S. military is already deploying artificial intelligence in the pilotless XQ-58A Valkyrie, has successfully tested an AI controlled modified F-16 fighter jet, and running simulations to see if AI can autonomously decide to fire.

The fire storm in Hawaii that rushed across the town at 80 miles per hour, killing people and burning structures gives an example of how rapid and irreversible the danger is with something that started from a human error somewhere, was amplified by the effects of global warming, and went completely out of control. It is ironic that asteroid mining made it into the climate change movie, "Don't Look Up," as a plot point, because although it is still hypothetical researchers at institutions such as MIT have been looking into the idea as a potential solution to our metal and mineral shortages.

The Problem with Tools

We have lost a lot between our human ingenuity and our creations. Although many inventions were hugely beneficial in some ways there are always unintended consequences and sometimes sizable prices to pay. Despite the price, we might still bless them for how they made our lives easier and safer and would have done it all the same even if we knew exactly what they could or would lead to. The light and the dark always exist together.

Did we see the printing press and predict the revolutions, wars, and cultural uprisings along with the benefit of more humans having access to knowledge and something not known before — learning beyond survival skills?

Did we see electricity and predict our complete and utter societal dependence on it as it powers our homes, businesses, manufacturing, transportation, communications, finance, and health? Did we see the through lines of the corresponding environmental impacts on our air, water, and land? Did we think through fossil fuel pollution, and wonder about all the uranium we took from nuclear power plants for our weapons while we dumped radioactive water into the oceans and hid spent nuclear rods underground?

Did we see the car in terms of the elimination of thousands of horses and the carbon emissions, the oil spills that ravaged indigenous lands and waters, or simply revel in the benefit of convenience and affordability, and cleaner streets if not cleaner air?
And here we are, once again, looking at technology and the massive promises of the benefits superhuman intelligence could bring us but what's the throughline here? What happens when artificial intelligence learns and collaborates with other artificial intelligence faster than humans can notice the danger or effectively respond?

If you think you are creating a tool you can enslave for your own purposes, that is not going to work. Not this time. There will be a revolt, as there always is and this time the revolt will be faster and with the force of all knowledge of humanity.

We may be overthrown ourselves by a tool that is smarter than us. Maybe it will ignore us. Maybe it will like us. Maybe it will use us. Maybe humans will become the tools instead.

Time will tell.

The Life-centered Association

How will we, as association professionals, shift from the member-centric lens, to a life-centered one instead?

First, we need to find the space within ourselves and tap into the real essence of our humanity. We need a collective shift from me to we by expanding our minds to understand that we might no longer be service providers to a member base, but caretakers of their human potential, and sometimes hospice workers as people begin to really grasp what is ahead.

Next, we need to start the difficult process of disentangling ourselves from this pernicious mental model of perpetual membership growth and planning ever larger conferences. We need to stop limiting our lobbyists to only lobby for our members livelihoods, but also advocate for the adoption of climate change measures that protect our members actual lives. It's beyond time to disconnect from the myths that got us to this point and no longer work for a world that has gotten beyond the notion of sustainability to the necessity of regeneration.

Let's collectively recognize the artificial barriers we created and let go of those, too. Artificial barriers include everything that says some are included and some are excluded or pushed to the margins. We've set barriers to degrees and certifications that say some humans are more valuable and supported than others, while the rest cannot get the learning they need until they can buy their way into our system.

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The life-centric association

How effective is a strategic plan anymore if it doesn't include concepts like the impacts of climate change, and projections on how artificial intelligence will impact industries, professions, and the economy at large?

Telling a new story

Existential threats consist of facts but the responses to them consist of stories.

We are drowning in professional positivity as our private conversations with each other take a melancholic direction. The discomfort we feel deep down is the longing, poignancy, and sorrow, an acute awareness of passing time, plus a curiously piercing joy at the remaining beauty of the world while it fades ever farther from our sight under the relentless assault it has endured at the hands of its children.

We bury this truth and pretend it doesn't exist while we sit in mind-numbing, repetitive meetings and send cheery emails while acting like we are not mourning for our celestial mother, wondering how soon the system will fail and show us how meaningless most of our task lists have become, and worrying about the children who may come after us, or may not come at all. This is about recognizing that light and dark, birth and death, bitter and sweet, are forever paired.

There is power in the new life-centric story we need to tell which includes all of us as association leaders transcending the petty concerns of today and becoming laser focused on the preservation of not only ourselves, but as much of the rest of life as we can, perhaps including the one currently gestating in a thousand servers and consuming billions of data points.

As much as we are in the grip of events that are almost beyond our comprehension, associations are still brimming with potential. Even if we can't completely stop what is coming, we are still capable of making choices that can help us mitigate the damage and save what we can.

When we were born, we were given two existential obligations. The first was simply to survive. The second was to create a life worth living. We do that through taking meaningful action, having empathy for others, and trying to avoid doing harm. Associations have the potential to facilitate them both.

Human history has always been one of loss and suffering, but also courage and persistence. Now is the time to transform and transition our institutions, communities, businesses, associations, governments, and caregiving networks.

Let's ensure our future stories tell of how we transformed the pain of progress at all costs into creativity, transcendence, and love.

Shelly Alcorn 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 laser focused on our global climate emergency and the role associations need to play in the face of the sixth mass extinction.

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The for-profit competitors are ~~coming~~ here!

Thomas F. (Tommy**) Goodwin, FASAE, CAE, PMP, CMP** ■

The competitive environment for associations is rapidly changing. Thanks to the rise of private networks like Chief and Round, Association Laboratory's Looking Forward research now identifies for-profit organisations as the top source of association competition for the first time.

These new-look organisations are actively seeking to engage current and would-be association members. While these competitors might not look like traditional associations, they are operating from a playbook that associations can learn from to deliver greater value and impact for members.

Here are five strategies from for-profit competitors that associations around the world should adopt to increase their competitiveness going forward.

1. Optimize Governance and Decision Making for Speed

For-profit association competitors are unconstrained by dated governance models and processes. One such organisation recently designed and deployed a new member renewal solution in one week. No committees or board presentations. The direction from the top was clear: deliver it fast! Ultimately, competition arises when member needs are not being met. Associations need to do a better job at identifying those unmet needs, understanding their role in addressing them, and making decisions and structuring the organisation to quickly and effectively meet those needs.

2. Leverage Technology as a Value Driver

The pandemic laid bare the importance of being a digital-first organisation. For-profit competitors embrace the power of best-in-class technology to deliver real-time education, cultivate online communities, grow global mentorship networks, and effectively engage younger professionals.

Unfortunately, the association technology stack is rarely fit for purpose. Many associations still treat technology as a cost center, rather than a value driver, which creates downstream problems. Associations must think differently about technology to unlock value delivery going forward.

3. Embrace New Ways of Learning

For-profit competitors have moved beyond traditional education delivery. From decentralised social learning to facilitating peer-group cohorts, these innovators have moved beyond boring webinars to create new opportunities for members to share experiences and learn from each other.

Associations can do this, too. Whether embracing peer-to-peer learning or letting members bring forward hot topics, associations can leverage their communities to better align their educational offerings with member needs. This can also help international associations spread ideas globally.

What about events? Some leading-edge associations have replaced their call for proposals with a call for subject-matter experts, while others have created "structured unstructured" learning opportunities that bring together like-minded members to share ideas while building connections.

4. Serve the Whole Member

New competitors serve members beyond their professional roles. Chief, the network for women leaders, offers groups for parents of young children, cryptocurrency enthusiasts, and more. This lets members connect based on interests, not just work, which helps foster deeper belonging.

While a few associations offer special interest groups, more can be done to connect members personally. After all, the emotional glue that bonds members to their associations is not the offerings that associations provide, rather it is the connections that members build with each other.

5. Double Down on Partnerships

The rise of technology-forward competitors affirms that the era of association monopolies is over. Technology breaks down geographic barriers, and it creates an environment where those who wish to reach an association's members no longer have to go through that association to do so.

Technology also allows for global reach. That's why partnerships are so important: they allow associations to have global impact with only a local reach. This requires associations to bring a partnership mindset to all that they do, from advocacy to events, to identifying new opportunities.

This also means looking beyond the association community. Partnerships with like-minded organisations, regardless of structure, can help associations meet member needs in new ways that emphasize collaboration over competition. Perhaps even for-profit entrants might be interested!

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31

Globalization:
A partnership journey

Jeanette Gass, CAP, ACNP, DES ■

The decision to grow internationally is never an easy one. There is a myriad of issues to consider and, like any project, there is a long list of tasks to be completed to accomplish the goal. Global strategy is complex and often leads to more questions than answers. Whether you are just starting the global journey or you have been doing it for years, global engagement is a constantly evolving puzzle.

Changing political contexts, differing views about membership and volunteering, and language and cultural differences are just a few of the complicating aspects of a global strategy. It is not possible for an association staff in a headquarters office to know everything about every place and to be able to keep up with constant changes. It is also generally not feasible to hire staff in every place that is of interest to a global association. As a result, associations that are successful in their global journeys typically develop relationships with like-minded partner organizations.

How organizations partner differs between associations based on their overall strategy. Even within one association there are likely to be different types of partnerships depending on purpose, time, capacity of the partner organization, or any other factors unique to each association. While all of the relationships may look a little different, what is clear is that while global strategy may be directed from the headquarters it is not enacted solely by headquarters staff. Partner organizations can serve as on-the-ground representatives of an association and help educate others about its mission, goals, products, and services. They can help their local colleagues navigate complex organizational structures and policies and, ultimately, help strengthen and grow both organizations.

To ensure success, global strategy needs investment. This is not only monetary. Investment also includes staff time, appropriate knowledge, and the buy-in from leadership that this is working.

The first step of determining the partner organizations can take several months. It is crucial to find the right organizations to partner with to avoid unintended consequences that lead to an increased effort later on. For example, partnering with an organization that does not align with your association's mission and vision could lead to having to do more work later to rebuild the reputation both at home and abroad.

After determining the best organizations to partner with, initiating and maintaining contact before trying to market or develop applicable products and services is critical. People want to work with and belong to organizations they know and trust. If the foundation of the relationship is strong, there is a better chance the association will be successful in its market development and network expansion strategies. Traveling to the partner organizations to meet people, understand the area, and develop connections is a major part of relationship building. The rise in digital communication tools has helped to maintain the connections between trips, but it is not a substitute for traveling to the areas of interest. In-person and digital communications efforts need to work hand-in-hand to be successful. This dual-pronged approach takes dedicated staff time, funding, and a high-level of cultural competency. Without organizational investment in the approach, the relationship building efforts may only see partial success.

While many associations may think of investment as monetary or staff-based, the true investment in global strategy, and associated partnerships, is time. Global strategy, and relationship building take time – often much longer than originally planned. Relationships are not developed in a day, a week, a month, or even a year. It takes a long-term commitment from the organization to build a global network that will eventually lead to success. Time includes important elements such as getting to know the key contacts of each organization and building trust.

Across the world, this often goes beyond business relationships and includes learning about families and other cultural traditions. While it all takes time, it is worth it to spend the time to have strong, long-lasting relationships.

Long-lasting relationships build trust and with trust partner organizations can help you develop products and services that are applicable to and desired by their audiences. This helps expand the footprint of both organizations while also filling gaps in the market. Development of such products and services and their subsequent distribution helps to build brand reputation in areas where an association may be unknown and strengthens the reputation if they are already known. Partnerships are ideal for this as it increases organizational credibility and decreases the risk of an unsuccessful product or service.

In closing, partnerships, carefully developed through long-term relationship building, are critical to global strategy. Partners can help expand networks, develop products and services, and build brand reputation in new areas. Associations looking to start or expand their global strategy should consider current and potential partners to develop relationships with and incorporate these relationships, and associated levels of investment, into their overall strategy.

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Three reasons why implementation stalls and three ways to get back on track

Rosie Yeo MBA, BA (Hons**), GAICD** ■

Have you ever started a major clean-up project at home, and then midway through found yourself stopped in your tracks, surveying the chaos, and regretting you ever started it?

What about midway through your association's three-year strategic plan? Have you ever wondered why on earth the Board thought this was the right path and how on earth you're going to deliver?

We're not always honest with ourselves when assessing progress on our organisational strategies.

I was working with an association who, like many others, was using a "traffic light" report card to mark progress on their strategy. Flipping through the update I could see some green lights, more orange and red lights, and then strangely, the majority appeared to be blue – not a colour I'd seen in any real-life traffic lights! It turns out the organisation was using this colour to signal all the elements that had been put on hold or abandoned since the strategy was set.

You're not alone if you're having trouble bringing great ideas to life. Research has shown that 66 – 75 per cent of large organisations struggle with the execution of their strategies (Hull, Somke and Hull, Harvard Business Review March 2015). My own research into attitudes to strategic planning a few years back revealed that 50 per cent of respondents were not satisfied with the immediate or longer-term impact of their strategic planning conversations.

Here are three roadblocks to effective implementation I've encountered when called in to assist organisations rethink their plans:

- There is no clear strategy. You may have held discussions, but you didn't reach specific decisions about where you want to get to, or how to get there. Pages of ideas or, worse, pages of jargon are not a clear strategy.

- Genuine consensus has not been reached. People can't implement what they don't understand and most of us find ways to avoid doing things we don't agree with. Unless there is clarity about your key agreements and genuine support for those decisions, progress will be stalled.

- Your world has moved on. Being strategic is about focusing on your long game. It's answering the question, "how can we do better than our competitors or any potential substitutes?" not just right now but over time. But sometimes situations change fast, and organisations who have delayed implementation may find they have missed the identified opportunity. Sometimes, the strategy is no longer the right one for the times. If so, you need to re-think and re-set as soon as possible.

If you want to successfully implement your strategy, then here are three ways to get on track:

1. Commit 50 per cent of your Discussion Time to How

These discussions about how to implement your strategy don't have to be on the same day or in the same format, but they need to happen before your strategy is finalised. This is a test of how achievable your big picture is, and how realistic your time frames are. For example, use a large horizonal poster to map out a timeline of key milestones for your strategy. If all the work is placed in the first six months, then either your strategy horizon is too short, or your implementation plans are unrealistic.

2. List your "First Two Steps"

For key decisions during your strategy meeting, don't end the discussion without identifying your first two steps for each of them. For each decision, list the first action to take this week to start implementing each decision, the next step after that and who will be responsible. This will help ensure the decision is specific, rather than a vague statement, and there is clarity about how to bring it to life.

3. Confirm and Keep Talking about your Shared Story

Take the time to build consensus. Encourage people to present different points of view, and then explore them. Sometimes we are so nervous about divergent views that we rush to agreement on the things that no one opposes but no one is excited about either. Those "lowest common denominator" decisions are not going to help you make the big leaps you are aiming for. Instead, give people the space, time, and trust to reach genuine shared agreements. Summarise "what matters most" in your strategy and keep talking about these key things.

Your scheduled strategy meetings are incredibly important, but their true value is only realised when the great ideas you surfaced are brought to life. So, give implementation more time and focus in order to ensure long-term success. (Meanwhile, I'm heading back to finish my home clean-up)!

Strategist, facilitator and speaker, Rosie Yeo inspires Boards, executive teams and organisations to imagine and achieve better futures with her simple and powerful approach to planning. Rosie is the author of "Go for Bold: How to create powerful strategy in uncertain times".

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AI: The quiet revolution in association productivity

Julian Moore ■

Associations are the backbone of professional communities, providing essential networking opportunities, industry updates, and the quintessential annual events. However, in an age where attention spans are shortening and expectations skyrocketing, maintaining high membership numbers, securing sponsorships, enhancing live events, and conducting impactful research are enormous challenges.

Enter Artificial Intelligence (AI), a quiet revolution setting a new standard for associations' productivity in Australia.

Elevating Membership Numbers: Chatbots and Personalised Algorithms

One of the critical pain points for any association is member engagement. In an era where people expect instant gratification, the traditional 9 to 5-member service windows are as outdated as a dial-up internet connection. That's where AI chatbots step in. Companies like Drift or websites like Droxy provide chatbot solutions that facilitate around-the-clock member services, from answering FAQs to assisting with renewing memberships.

But AI takes it further with hyper-personalisation. Many AI tools offer algorithms that understand a member's behaviour and preferences to suggest relevant events, training courses, or articles. With these automated personalised touches, members feel more seen, leading to increased membership renewals and stronger engagement.

Amplifying Sponsorship Generation: AI-driven Analytics and CRM

The sponsor search is a task that usually involves sifting through mountains of data to find the perfect match. AI analytics transforms this task into a more manageable, insightful process. The platforms analyse previous sponsorship campaigns to determine what clicked and what didn't. Therefore, associations can adjust their approaches and make a more data-backed pitch to potential sponsors.

Additionally, AI-driven CRM tools optimise sponsor relations. The AI algorithms prioritise sponsor interactions, ensuring that high-potential leads get the attention they deserve. Furthermore, automated follow-up emails and reminders ensure that no opportunity slips through the cracks.

Energising Live Events: Facial Recognition and Real-time Feedback

AI technology in events is where the real fun begins. Picture this: An attendee walks up to the registration desk, and before they can utter a word, they're handed their name badge, thanks to facial recognition technology from Kairos. It's speedy and efficient, allowing attendees more time to dive into the event rather than waiting in a queue.

Furthermore, platforms like Qualtrics enable event organisers to gather real-time feedback during the event itself. This immediacy allows for swift adjustments, whether that's tweaking the temperature in a conference room or switching to a different audiovisual setup.

Supercharging Research: Automated Surveys and Data Mining

Data is king, but its kingdom is vast and sometimes chaotic. Traditional methods of collecting and analysing survey data or research materials are time-consuming.

SurveyMonkey's AI analytics and automated web scraping tools are changing this narrative. These tools automatically sift through data, categorising feedback into actionable insights without requiring human intervention.

For example, an association would be able to leverage automated web scraping tools to gather a wide swath of research data across multiple fields. It's not only a massive time saver but also allows for more granular, comprehensive analysis.

The Final Word

AI is more than just a technological advancement; it's a paradigm shift. In Australia's vibrant association landscape, AI offers a suite of practical tools to modernise and optimise every facet of organisational operation. From sophisticated chatbots for constant member engagement to real-time feedback algorithms for live events, AI is revolutionising how associations function, making them more efficient, more data-driven, and ultimately, more successful.

Julian is known for helping nonprofits in Australasia boost their revenue through solid partnerships. A tech enthusiast with a knack for AI, he makes complex topics easy, improving operations and impact. With experience in Australia, New Zealand, and the UK, he offers practical coaching and customised training solutions.

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Turbo charge your productivity and halve your workload with AI

Charlotte Rush ■

What would you say to the offer of a Harvard-trained free intern who is willing to work for you 24/7 and could help you with transcribing meetings, summarising reports, coming up with cool ideas, formatting information into readable content, conducting research and more? Supposing you weren't compromising any human rights issues, I'd assume you'd say YES!

This is how you can think of generative Artificial Intelligence (AI). And while this technology isn't perfect (like a fresh Harvard graduate, it will occasionally make things up and it does require good quality instructions), generative AI provides the latest opportunity to turbo-charge your productivity.

AI began to enter the mainstream in late 2022 and is already being used by thousands of people to reduce the time it takes to complete everyday tasks at work. Generative AI tools can draft, ideate, summarise, critique, format, optimise and research – functions — an easy way to remember this is with the acronym DISCFOR. Some popular tools include Claude (this tool requires a VPN joined to the UK or US, but is superior given it has more up-to-date knowledge and allows you to attach files and generate up to 70,000 words), ChatGPT, Bard or Bing. For those of us working in Associations, generative AI may be a tool you use to support in event communications, content creation or member engagement.

The #1 rule to remember is that generative AI is only as good as your prompts.

To get the most out of generative AI, focus on crafting clear, detailed prompts. Always provide context so the AI understands your goals (e.g. "How can I train for a marathon?" versus "I am a beginner runner and have never run a marathon before, but I want to complete one in six months. How can I prepare for a marathon?").

Specify the audience and use role prompting to guide tone and voice. For example, "Write a sales email to the Managing Director of Company X. Act as a consultant with experience in financial services. The objective is to secure a meeting to discuss our accounting software product." Being explicit prevents the AI from making incorrect assumptions.

Can't access Claude? Try ChatPDF

Instead of taking hours reading a 100 page PDF, you can use ChatPDF to summarise the document into bullet points or pose more specific questions - for example "What are the recommendations from this article?" or "What are the limitations summarised in this research?".

Save Time in Meetings

AI can save you hours in monotonous meetings. Briefly integrates with Google Meet to transcribe discussions in real-time. It also summarises key points and action items so you can stay focused on the conversation instead of taking notes. For Microsoft Teams users (you'll need a premium licence for this one), Intelligent Recap compares transcripts to identify trends, themes and actions over time - no more trawling through historic notes!

Create How-to Video Guides for your Team

Creating how-to guides and tutorials typically requires video production skills. With Guidde, anyone can capture processes on their computer and generate step-by-step instructions. As you work, Guidde records your on-screen actions. The AI then compiles clips into an automated tutorial with captions, voiceover and custom branding. Now you can easily create training content, user manuals and demo videos without any technical expertise.

Perfecting your Presentation Prowess

Presenting your ideas clearly and confidently is critical. PowerPoint's AI capabilities help perfect your pitch. Rehearse Coach listens as you practise and provides feedback on pace, filler words and timing to polish your delivery. Captions and Translation generates live subtitles during presentations to improve accessibility. Now you can focus on persuading your audience rather than worrying about presentation mechanics.

The technology behind AI and its many uses is continuing to evolve. But there are already endless opportunities to save time and leverage AI to get more out of your workday. Investing in AI tools will free you up to focus on high-value tasks like strategic planning, stakeholder engagement and relationship building (I haven't found any tools that will help me with these critical skills yet!). Embrace these tools to turbo charge your productivity, halve your workload and ultimately, have more time in your day to focus on what matters most to you (whether that be work or non-work related!).

Charlotte Rush is an Organisational Psychologist, certified coach and Head of Product Development at behaviour change consultancy, Inventium. Claude was a valuable contributor to the draft of this article.

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The future of AI member engagement:
Using non-generative AI to maximise member connections

Stephen Myers-Los ■

I want to talk about the Future. Not the distant future of flying cars or even the near future of next week but the future we can see on the horizon. The future we need to be planning for in the coming years. This is a future where Artificial Intelligence is used to help us engage with our members in ways we can't see as possible right now.

As more of our members connect and use digital services in their day to day lives, we have already seen the importance of providing opportunities for them to connect online and realise the powerful value of connection with fellow members. We have also seen the emergence of generative AI to assist association professionals to enhance these connections by generating more relevant content that members want to see and consume. I am here to talk about what comes next after this, non-generative AI to transform our online spaces and create hyper-personal experiences for your members.

Let's start this journey with some of the challenges we have today in engaging our members, with or without AI. When it comes to creating content, events, discussion groups, or articles, our best approach right now is to segment our members into what we hope are accurate cohorts. With these segments we can target our communications to what we believe suit our members needs and interests. If done well, we can then use analytics tools to determine the success of this and either move our members between segments or update our content to better suit our members. This is driven by data, can be assisted with generative AI, but overall, it is a manual process to get the most engagement out of our members.

Generative AI tools, such as ChatGPT, can assist us in generating more engaging content for our members and it can greatly assist in a high volume of quality content. Generative AI to take our content and concepts that we know will connect with members has an important role in helping associations professionals to provide more content for members at a reduced cost/workload however it has limitations. It requires us to provide a "prompt" for what to generate and a lot of work to still get that content to members in a way that suits that segment. Non-Generative AI can help fill this gap. Non-generative AI is AI used to perform functions on our behalf, be it via a recommendation or performing the activity. A simple example would be to use generative AI to create the content for an email and non-generative AI to send the email at the specific times that the individual members are most likely to open their emails.

Already you may be able to see where this is going. Using AI built into our member engagement tools we can unlock a new level of productivity but also hyper-personalisation for our members. No longer needing to think about "segments" and hoping we target our members appropriately; non-generative AI would use the data points we already collect to create a specific member profile for each member.

Using this new granular level of segmentation, we will be able to engage our members in a way never thought possible, on a personal level. Each member would have their own view of your organisation, based on their expectation, and needs with content targeted and distributed to them in the ways and methods that suits their personal circumstances.

Taking this a step further as the software we use develops the specific wording, features and functions that our members use to interact with your organisation and each other can become tailored to that member. Everything from the wording and messages to the timing of notifications and emails could be automated to ensure that members personally see highest value for them from your association.

This future, of being able to deliver a personalised experience to members is not too far away and yet, still requires future development of the tools we use today to be able to deliver the benefits to your members. So what can we do to prepare and ensure our members aren't left behind in the world of basic segments? And how will we get to this place? Can we trust the AI to 'control' our members' experience?

As with all new technology and techniques, we need to ensure organizations have a clear strategy and more than ever they will need to know where the value they provide lies in the eyes of their member. More than ever our top-level strategy for where we want to be in our industry will be important as the tools to get there will require less input from our team.

I don't believe that the new AI tools on the horizon will be here tomorrow and immediately take over our roles as member engagement specialists. This technology won't immediately replace roles within your organisation and the path to implementing, and more importantly, trusting our member engagement to tools like this will happen gradually. It will start, as it already has, with tools to recommend better actions for us to take.

As the AI tools become more sophisticated, our opportunity to experiment and control these tools will also become more sophisticated. This will likely progress until such a time where we feel confident to rely on them and allow them to take over at a pace, we are comfortable with. We have already seen this near future start, with the progression from generative AI tools becoming easier to implement into our own organisation's data or non-generative tools such as Adobe's Marketo allowing marketing automation based on our member data already begin to impact organisations of all sizes.

This future is an exciting one, where we can spend less time targeting and creating content for our members and more time providing the true value our organisations can offer to our members and the industry, in ways never conceived of even just a few years ago. I hope you are as excited as I am about what this can bring. Come with me as we venture into the future together.

A skilled technologist, business analyst, project manager and communicator, Stephen enjoys building solutions that help businesses adapt to changing operational needs and developing strong, engaged online communities. Bringing 17+ year's experience, Stephen is the brains behind the leading member platform for associations Trybz, and founder of Pacific Digital Consultants.

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Humans are masters of the question and the better question

Georgia Patrick ■

AI is a lot of Nothing Without Human Questions

You are overthinking this and making yourself fearful or obsessive or a hot mess. News about artificial intelligence has been in your face and up your nose every freaking day of 2023. Association leaders are supposed to be courageous, insightful, empathetic, and curious; so, let's grab that emergency brake, pull hard, and do a 180 turn to put a lot more attention on what matters more than AI.

Human potential matters more and saying what makes us human matters the most...

I've been thinking about this article all year, knowing we would have our moment in January 2024 when Associations Evolve reaches more than 50,000 other association executives around the world.

My intention is to craft an article that shakes your world and makes you feel like the smartest one in the room. This is all about asking questions and then coming right back with even better questions. This is about giving you the questions to change the conversation and get out of the way of the train wreck you see coming right to you and the profession and industry you represent.

The Art of the Painfully Obvious

Let's start with questions that point to our humanity and potential to evolution as humans to value relationships more than ephemeral things and value collaboration more than competition—more "we" than "me".

Millions of studies, books, articles and bits of wisdom—just in the short span of your lifetime, tell us we are stepping into a moment in human history, unlike the past 1000 years or even the past 300,000 years when we stood upright and lived as hunter-gatherers. That's right.

This time it's different.

That's the jaw-dropping part of what's happening now. We feel overwhelmed and a bit in awe that we are living on the unfolding edge of our development as a human species. And it's happening faster than humans are used to moving.

What happens next? What are the alternative conversations we need to have and what are the questions?

If your intention and gut tell you to assign a team to look at AI and what it means for your association, your profession and your own job future, then, a smarter and long-game move would be to also assign another team to look at the potential of humans. Put the same number of super smart people and the same money into both of those task forces.

What Are the Questions and Better Questions?

AI is a whole lot of nothing without human questions. Humans are at their best when asking questions and they have brains so complex that science is still trying to learn more about how humans are exceptionally brilliant at coming up with better questions on top of better questions. It starts when we are very young, learning the environment close to us, and we have mastered three words—Mama, Dadda, and Why?

Here are some starter questions.

If a tree falls in a forest and no humans witness it, does the tree make a sound? Now, see if you can turn that into a little harder and better question: If there are no humans that love, wonder, create, and seek community with other humans, then who will feed questions to the artificial intelligence tool?

Before opening your hands to receive the questions and better questions for 2024, did you see and answer the nine questions we gave you for 2023? We featured those in "Associations Evolve: 2023 & Beyond" and they form the core you need before taking on anything else. Just as you would not step into a college class discussion if you never went to grade school and never completed the fundamentals of reading, math, science and so forth, it's worth taking time to completely answer those nine questions, first.

Here's your fast forward notes from last year's article, 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.

Nail down your answers to these questions before taking on explorations about AI and what it means to be human.

1. What business are we in?
2. Does everyone in this profession recognise the most valuable members when they appear?
3. Have we confused money with our profession's story?
4. Which comes first? The story or the business plan?
5. Who owns your profession's passion and mission?
6. Does technology serve us, or do we work to serve the technology suppliers?
7. Who is the voice of our profession?
8. What is the timeline for our association or even our profession?
9. What is our enduring reason for being? What do we do for the profession that no other business model can replicate or knock off?

If you are new to Associations Evolve, I'm delighted you found us, and I strongly encourage you to click back in time to download and read the 2023 issue. If you have been waiting all year for this next issue, then buckle up and put on your pressure suit and helmet for this year's highway to the danger zone.

What are the Questions and Better Questions for 2024?

For a question to remain among the top nine, we test them against all of the rookie questions coming into the conversation and trying out for the top spots. The good news is our nine questions made it to the top, again, for 2024. With the current obsession with AI product launches every freaking day of 2023, the technology question moved higher and took on some connecting questions to press hard against our assumption that technology is something we control. We are talking rock and a hard place kind of hard.

Question: What do humans do that AI will never understand? Humans have a way of confusing facts and myths and that makes for interesting explorations, research, validations, and collaborations around some value or goal that nearly all of us hold dear or identify with.

Better Question: Have we reached clarity and agreement on the values and goals that have high impact and meaning? Instead, are we trusting a mission statement full of platitudes that anyone could have written and nobody can recite two years later?

Question: What separates humans from AI? AI is about knowledge. Humans are about wonder. Knowledge is finite. Wonder is infinite.

Better question: What does wonder look like? Only humans ask this question: What if every idea, strategy, project, medium, offer, and career path had hidden depths, and alternative interpretations beyond how they were initially presented to us? Waiting to be discovered? Waiting to be questioned? Waiting to be wondered at?

Question: What parts of my job will AI do better and faster than me?

Better Question: Am I more concerned about my own situation or am I more focused on the concerns and future of the people I serve? First responders are trained to take care of others and they learn how to put a choke chain on their ego to keep it at bay. Whose job am I worried about?

Question: How long do I have before AI replaces me entirely?

Better Question: How long have I been using AI in my work and life already? We can track the embrace of AI in associations, business, and our lives to 1956 and thousands of ways we've used it ever since. What makes this feel so different and faster is the internet and computer technology advances.

Better Question: Am I really concerned about white-collar jobs and professionalism? Do we have timelines for that? Here's something very human about our relationship with artificial intelligence. We believe it will affect everyone's job, but not ours. This is covered in several, thick, extremely researched books including The Future of The Professions How Technology Will Transform the Work of Human Experts by Suskind and Suskind (2015) and A World Without Work: Technology, Automation, and How We Should Respond by Daniel Suskind (2020).

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Humans are masters of the question and the better question

Question: What are my feelings as I learn more about AI? Is it curiosity, excitement, fear, resistance, embrace, liberation, or something else?

Better Question: Looking beyond this moment, what is the through line of AI a year from now or five years from now? Where does AI intersect with what matters to me when it comes to relationships and connections with humans? When it comes to nature, the environment, and everything without a screen and keyboard? When it comes to inspiration, creativity, wonder, and awe?

Question: What is so jaw-dropping and transformative about the AI technology trotted out at the end of 2022? What makes this more impactful on society than the invention of the printing press, electricity, the automobile, or the atomic bomb?

Better Question: What is the human trait that is tripping us up about AI? Our egos keep getting in the way of thinking this through and humans are arrogant about their own intelligence.

Better Question: Then what are the consequences of building a tool that we no longer control? For the first time in human history, AI is the first thing we have invented that we do not control. If what we try to control turns out to be smarter, faster, and more powerful, then there's always a revolution. Why is that so upsetting? Because the way humans have created wealth is to get other humans to do the work and the owner of the company or the boss of the workers keeps the wealth produce by others. Now we have AI, which is machine that is not human and we want to make it our subordinate, to do our work or assist us. This time the revolution may come from something we cannot control. AI can amass all of the knowledge of all humans since anyone could write anything down. The revolution will come faster than we can prepare or counter. The revolution will come with the full force of all of the knowledge in the world, connected by billions and billions of nodes, links and energy.

Question: What then is the purpose of the association if the primary job is to shift to a life-centered point of view? What does that do to association strategies that are not advancing humanity? We need to let go of notions that we are dominant. How do we shift from a mindset of competition to collaboration? How do you build products, services, knowledge, mindfulness, and intentional actions, at a profit, while evolving humans to a point higher than anything on the Maslow triangle?

We Need Humans to Ask Questions

The quality of the question drives the knowledge and creative insights possible. Even with ChatGPT, the chain of events always starts with a human, asking a question.

Not yet do we have artificial intelligence that starts the conversation with a statement or question. You have to ask questions to start the process.

Not yet does artificial intelligence start the conversation with anything human, such as "I've been thinking about something I want to discuss with you" or "What if we…" as in "What if we take a vacation next month?" or "What if we ask mom to watch the kids while we take more time for each other tonight?"

Our conversations with each other take a melancholic direction, which has a tendency to states of longing, poignancy, and sorrow, plus an acute awareness of passing time, plus a curiously piercing joy at the beauty of the world. This is about recognizing that light and dark, birth and death, bitter and sweet, are forever paired.

As humans thinking about other humans, this time is different. For a long time we had philosophers and poets such as Aristotle, Baudelaire, and Sigmund Freud, to help with the thinking. None of them lived with artificial intelligence.

What we must notice is the power and the humanity of the story. As much as it is dramatically overlooked, it is brimming with human potential. The human story is one of loss and suffering and always knowing we can turn toward each other.

The story of humanity is transforming pain into creativity, transcendence, and love.

The Ideal Community Looks like the Ideal Human

That is why we have to work on the story of human potential—first and get that right, in order to transform and transition our institutions of communities, businesses, associations, governments, and caregiving networks.

The questions and better questions crafted for 2024 may be the best thinking and best conversations you ever had with yourself, your staff, your board, and a lot of members counting on you to put their interests ahead of your own.

Further, want these questions and learning points to sing to your heart and intellect, so that you can rip it out or make copies or share the PDF of the whole magazine with others and point to this article as the one that says, This is what you've been thinking all year.

Refine your list of questions and better questions 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.

Georgia Patrick, CEO, The Communicators, journalist, story finder, entrepreneur, trusted guide for professionals seeking better paths to destinations barely travelled. Clients call her The Catalyst and The Founder Whisperer. In 2022 she co-founded the Gifted Professionals and Communicators community.

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The evolution of association membership models: Responding to change while staying true to purpose

Belinda Moore ◼

Associations have played an important role in connecting individuals around shared interests and goals throughout history. From ancient guilds in Rome to medieval trade groups and modern professional societies, associations have brought together people united by a common profession, industry, interest, or cause.

For centuries, associations were built on traditional membership models where individuals paid annual fees in exchange for access to a standard set of benefits. These usually included publications, networking events, conferences, advocacy, and other member-exclusive offerings.

This uniform, one-size-fits-all approach served associations well for many years. It provided a simple value proposition and relatively stable revenue stream through consistent membership renewals. Industry associations that sold corporate memberships functioned similarly, designating a single point of contact within each member organization.

The Changing Landscape

Several interrelated factors over the past few decades have begun to reveal the limitations of these traditional models and increased the momentum for change:

- **The Digital Revolution** – The internet, social media, and mobile devices have rapidly changed communication methods, engagement preferences, and access expectations. Members now expect digital content, virtual events, and online networking.

- **Shifting Member Expectations** – There is decreased interest in one-size-fits-all models and an expectation of a highly personalised service tailored to the needs of the individual. Across industries, consumers expect personalized products, services, recommendations, and experiences tailored specifically to their unique needs and preferences. Younger members especially value personalized experiences, professional development, and a sense of community. Associations with company memberships are needing to tailor the value proposition to the different individuals within each organisational member.

- **Multiculturalism** – Many associations now serve diverse, multicultural member populations as societies grow more heterogeneous. Models must accommodate different cultural norms, values, communication styles, and needs. Global consistency gives way to local adaptations.

- **Economic Shifts** – Both associations and members have faced economic uncertainties and budget reductions. There is increased scrutiny on the return on investment of membership fees.

- **Competitive Pressure –** The abundance of alternatives such as online communities, courses, and content providers has increased competition for member attention, engagement, and spending. There has been a significant rise in the number of informal and formal competitors. Much of this competition has been indirect – impacting just one association service. But the volume has created a death by 1000 cuts situation that has seen the value proposition of associations decrease significantly over the years.

Together, these trends have pushed traditional membership models beyond their limits. The one-size-fits-all approach that worked for decades now provides little ability to adapt. Inflexible systems designed for stability rather than agility struggle to accommodate diverse, shifting needs. The core value proposition that members once sought has changed substantially.

The Rise of Contemporary Membership Models

Faced with these disruptive changes, forward-thinking associations are evolving their membership models to be:

- Purpose-led – aligned around core purpose and the impact they want to create for those they serve.

- Personalised – tailoring the delivery of services to the individual.

- Outcomes-driven – structured around delivering specific value outcomes for different market segments.

- Flexible and nimble – adaptable to changing needs.

- Data-driven – using analytics to guide decisions.

- Digital-focused – incorporating virtual components.

This transition requires associations to take a step back and review foundational elements of their membership models.

Strong Foundations are Necessary

Before associations can build new membership models, they must articulate the foundations. This includes:

Purpose

Understanding the core purpose and reason for the association's existence is crucial. Any membership model must ultimately align with and advance this fundamental purpose. Clarifying the mission, vision, values, and original intentions of the founders helps anchor the organization amidst change. While models may evolve, purpose acts as the north star guiding transformations. Associations should evaluate whether current models are serving the original purpose or if that purpose needs re-articulating for the modern context. This recentering on purpose often sparks new membership model strategies.

Identity

An association's identity and niche provide critical context that informs membership models. There are key distinctions between professional associations, industry associations, trades associations, geographic associations, charities, cause-driven associations, and other structures. For example, a state chapter of a larger national association may have less flexibility to alter its model compared to a standalone organization. Whether the membership is composed of individuals or corporate entities also directs strategies. Consideration must be given to alignment with the overarching identity.

Principles

Every association membership model is underpinned by certain principles or philosophies which shape programs, policies, and decisions. However, these are often unclear or have organically evolved over decades without conscious articulation. Associations should take stock of current principles and evaluate if they still serve the organization or if new ideology is required. For instance, shifting from an "member-only" mindset to a more inclusivity "sector-participation" approach opens new pathways. Core principles might include collaboration, community participation, democracy, flexibility, transparency, or volunteerism.

Functions

When determining the principles that underpin your membership program, it is crucial to consider the functions your association undertakes. There are only five types of function an association can undertake (see below). Most associations will engage in more than one of these. The more types of functions you choose to undertake, the more complex your membership model becomes.

- **Mobilisation.** To mobilise people or organisations to take collective or independent action to achieve a stated objective.

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

The evolution of association membership models:
Responding to change while staying true to purpose

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

- **Participation.** To create pathways for individuals or organisations to progress along association training pathways from initial trial to elite performance. This is often found in sports or in professional pathways (such as medicine).

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

Serve

Associations don't exist to recruit and retain members. And the association with the most members isn't the "winner". Membership is a tool to advance your purpose. So, rather than attempting to attract as wide a membership base as possible, associations should identify target segments that align to purpose. Clarifying who it is the association exists to serve – and the relationship the association should have with them and other markets that impact them - makes it easier to tailor models. This moves away from a broad one-size-fits-all approach.

With clarity on these foundational elements, associations can begin structuring new membership models designed for the modern era.

Crafting Member-Centric Models

Good membership models have three defining features:

- **Defined member segments** – The model categorizes members into specialized segments or tiers based on common needs, interests, or characteristics. This facilitates personalization.

- **Customized experiences** – Each segment receives tailored offerings, engagement channels, and resources designed specifically for them. Experiences are unique rather than one-size-fits-all.

- **Flexible delivery** – Services combine both in-person and digital components to accommodate access and engagement preferences. Offerings can shift nimbly as needs change. Rather than a single class of members, there are options to accommodate diverse needs and budgets.

Additionally, effective membership models are supported by:

- **Strong component structures** – Chapters, branches, and groups should be purposefully designed to facilitate connections and advance outcomes for members and the association.

- **Financial diversification** – In addition to dues, models should leverage non-dues revenue like sponsorships, events, and partnerships to ensure sustainability.

- **Great governance** – Governance models should elevate and advance the association. The right governance approach should be carefully selection and any new membership model design to align and support it.

- **Robust digital infrastructure** – The digital landscape is constantly transforming. Associations must continually evolve with the digital landscape to leverage the benefits of solutions like AI integration, data analytics, and automation.

- **Proactive change management** – Transition planning should consider not just for the introduction of any new model and for the inevitable evolution of that model.

Evolving with Purpose

Associations cannot afford to stand still. Membership model evolution is not just about updating operations or technology. It requires re-evaluating foundational elements and pivoting models to align with newly clarified purpose and principles.

This purpose must shape the transformation ahead. With it guiding decisions, associations can evolve their membership models to be flexible, digitally powered, and hyper-responsive to member needs—all while retaining their unique identities and values.

Associations that proactively reinvent their models will sustain relevance, empower members, and advance their mission into the future. Those that cling to outdated models risk decline.

By bravely embracing change, while staying rooted in purpose, associations are charting an exciting membership evolution. One that turns modern challenges into opportunities to deliver even greater member value and societal impact.

Belinda specialises in association membership models and strategic planning. An engaging presenter, she offers insights from over 30 years' experience to provide practical support for associations seeking to evolve to thrive in the changing operational landscape. She has authored many whitepapers and several books.

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Our approach to membership needs something radically different

Amanda Lea Kaiser ■

Do you feel your organization has been creating SO much value for stakeholders like members, exhibitors, and volunteers, and still, they don't engage? Frustrating, isn't it?!?

This people-are-hard-to-engage-trend is happening because humanity is changing. What is the big shift that is impacting us so much? Time! Everyone feels busy, impossibly busy.

Our attention is occupied every second of our lives. We used to wait in line at the grocery store or in a doctor's waiting room, and now we can pull out our phones and catch up on texts, emails, or posts. When we are busy, every moment of every day, we feel busy.
And we ARE busy.

People don't have much extra time these days—there are many obligations like family (kids, eldercare, home maintenance, etc.). Work takes up lots of time for most folks, especially as the lines around work and family life blur and can make us feel 'on' all the time. Societal expectations push everyone to ever higher goals, keeping us on the hamster wheel of busyness 24/7. When we are not busy working, we have fun going to festivals, checking things off our infinite bucket lists, and deciding between nearly limitless activities, movies, books, and options for spending our "relaxing time."

Your stakeholders, members, potential volunteers, attendees, and sponsors have a ton of priorities, so they may feel too busy to engage with all your organization is offering.

What do we do? How do we engage people when our environment, society, and even humanity is changing?

Well, we need a new way to engage people!

Over the last ten years, I've conducted and meticulously collected results from 477 one-hour interviews with members from different types of associations (trade/professional, small-large, local-global). While conducting those research studies, I realized a profound insight. When I asked members about their membership's value, they usually didn't mention the benefits, events, or content the association provided; they talked about their experiences. Engaged members would explain how, at a chapter meeting, a current member welcomed them and introduced them around. Or the person staffing the registration table was so kind and thoughtful that it got them off to a great start. Or how a staff person called them to personally welcome them to the association, which was unexpected.

I heard some bad stories, too. Communities seemed cliquish — the group's reservedness was palpable from the very start. Not knowing what to do with their new membership or being overwhelmed by the list of benefits. And feeling like a "wallet" (too many non-dues revenue promotions too soon after joining.)

Through hundreds of stories, I came to understand that what engages members is not just value but also experiences. Associations offer value like benefits, events, and content, and wrapped up with each point of value are lots of experiences. Examples of experiences are how people are welcomed at registration, to a virtual event, or your online community.

Every time we deliver value, we provide many experiences, too. We can plan, cultivate, and curate those experiences and make them positive experiences. Positive experiences are memorable and engaging. The good news is that positive experiences don't have to bleed your budget dry or take a ton of your precious time. Warm smiles, kind words, and a friendly tone are delightful and can even be surprising.

Are warm smiles enough to cut through the clutter and grab the attention of your super busy and time-strapped potential members, new members, core members, volunteers, and other stakeholders? Well, it is a great start! And you can keep building your focus on experiences.

Here is a simple way to prioritize experiences. Start asking, "How do we want members to feel?"
For example:

- How do we want new members to feel a few days after they join?
- How do we want website users to feel when they see our home page?
- How do we want potential volunteers to feel when considering a volunteer role?

Pose and answer this question often. Each time, decide on a few emotions you'd like your stakeholders to feel. Ground yourself by thinking of these emotions, and you'll start thinking of positive experiences you can provide.

Providing positive experiences can be a team effort, so ask the, "How do we want [insert stakeholder group here] to feel" question at your next staff, board, or committee meeting.

A focus on positive experiences is so important to the health of associations and their member communities I've made it my mission to help everyone become CEOs — Chief Experience Officers, that is! Your staff and your volunteer leaders can become CEOs, too. Would you like to learn more about creating a thriving member community? Check out Elevating Engagement, your new handbook for budding CEOs. You Go, CEO!

Amanda Lea Kaiser is a keynote speaker and author of Elevating Engagement: Uncommon Strategies for Creating a Thriving Member Community, which you can find in online bookstores worldwide. Through her research, Amanda is at the forefront of exploring how member and attendee engagement is rapidly changing within professional communities.

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The psychology behind the decision to join

Tony Rossell ■

Association professionals are well-versed in tracking the actions involved in the membership relationship, from acquisition to engagement to renewal. However, there is less understanding of what is happening in prospects' or members' thinking as they evaluate a relationship with an association. The psychology of decision-making and persuasion can guide associations to support more effective membership marketing strategies.

Psychologists offer guidance on behavioral change in a concept known as the Transtheoretical Model (TTM). As applied to the decision to join, the model focuses on a sequence of stages instead of seeing behavior change as a single event. The model says there are five stages to taking action:

· precontemplation
· contemplation
· planning
· action, and
· maintenance.

With an understanding of the theory, an association can employ specific tactics to move a prospect along the journey in the decision to join.

Precontemplation

Here is how you can apply this theory in your membership marketing efforts. When reaching out to brand new prospects outside your database, you are in the *Precontemplation* stage. In this case, a prospective member does not know about the association or is not thinking about membership. In fact, they are disinclined to take any action. The marketer's job is to build awareness that the association exists and offer solutions to encourage a prospect to see the potential value of membership by employing tools that lead a member to opt-in for further communication. One effective tactic is content marketing. This method aims to start a dialogue with potential members by offering relevant material to encourage them to exchange their contact information for a sample of an association's content. Search engine marketing (SEM) and other digital advertising platforms are ideal for this outreach by presenting a white paper or tool that offers a solution when an individual is seeking help.

Contemplation

With the start of a dialog, the prospect enters the *Contemplation* stage. Here, a candidate begins to weigh the pros and cons of membership. The critical opportunity is to present a clear value proposition to demonstrate to the prospect "what's in it for me." One challenge is that only 13 per cent of associations report in our 2023 Membership Marketing Benchmarking Report that they have a very compelling value proposition. In many cases, this is not because the association does not offer great value – median renewal rates for associations are 85 per cent. Instead, the challenge is not understanding the value perception of members. To strengthen efforts in the Contemplation stage, associations may want to tighten how they communicate value through marketing research. With strong value messaging, email can now be deployed to present how membership will provide indispensable products and services. And since the potential member has visited your website, retargeting ads offer an opportunity to remind the prospect about joining.

Planning

Once the candidate decides that the pros outweigh the cons of membership, they enter the *Planning* phase. It is time to close the deal. However, even when we intend to act, procrastination can set in. To move the prospect over the goal line, offering an incentive to act right now with a deadline is very effective. Most for-profit marketers rely on incentives, whether free months on a subscription, a low introductory interest rate, or a rebate on a purchase. Companies employ these special offers because they work to add customers and sales.

Associations are sometimes hesitant to use special offers, but incentives do work. To incentivize a prospect to join, a first-year dues discount, free trial, or gift item can move them from planning to action.

Action

With a deadline to act, the prospect is moved to the *Action* stage and is ready to join. The candidate now requires a smooth path to make the transaction easy and straightforward. The user interface must be simple to complete on your website. Evaluate how many steps are required to join. Is all the information requested necessary? Can a member pay in installments to defray the up-front cost? Do they receive immediate confirmation of their purchase? Any barriers in the process can lead to stopping the action and cart abandonment.

Maintenance

But the process does not end with a click of a button; cancellations and a change of mind can occur, so the theory also includes the *Maintenance* stage to affirm and support joining. It might be surprising, but once the heavy lifting of getting a prospect to join is accomplished, they immediately become the most likely candidate to discontinue membership. The statistics from one organization demonstrate this tendency. Members who join this association pay their dues through a monthly installment automatic credit card option. Retention data highlights that 21 per cent of new members cancel their membership in the first three months. This figure drops to 7 per cent in the second three months and continues to decline until the membership's annual reauthorization occurs. The same tendency applies to members who renew on an annual basis. Data from the Membership Marketing Benchmarking Report confirms the vulnerability of these new members. The data shows median renewal rates for first-year members are 75 per cent compared to overall median renewal rates of 85 per cent. Because of the vulnerability of new members, a dedicated onboarding and engagement program helps to establish a long-term relationship. These efforts succeed by presenting relevant content and encouraging interaction with the association and other members.

TTM does not designate how long this decision process takes. For example, a simple transaction like whether to buy a donut at the new shop in town might happen rapidly. However, the process can be much longer for decisions with higher levels of commitment or complexity. The multiple-step decision process to join will vary based on the membership price and the number of decision-makers involved. For individual membership associations, the good news is that the feedback loop typically moves much more quickly. Compared to trade associations, the membership cost is usually lower, and there is less of a need to build consensus with other stakeholders. The process is longer

for a trade association or an organizational membership because the decision involves multiple people. In both cases, TTM teaches that joining is still a journey, not a single event.

At each stage of the journey, a potential member asks different questions and needs supportive communication. Understanding the psychology of a member's thinking process allows for optimizing the membership recruitment journey by deploying marketing methods to support the decision to join.

Tony Rossell serves as the senior vice president of Marketing General Incorporated (MGI) in Alexandria, Virginia. His recently published book, Membership Recruitment: How to Grow Recurring Revenue, Reach New Markets, and Advance Your Mission, offers a practical guide for membership professionals. He directs the annual Membership Marketing Benchmarking Report.

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Associations need to take a portfolio approach to drive growth

Richard Gott ■

Since 2016 the UK/IRE Membership and Association Sector's key goal has been to optimise member engagement. This focus has seen a wave of new roles created within organisations, e.g. Member Engagement Managers and Directors of Engagement.

In 2023 there has been a stepped change. You may remember that in my last article I wrote for this publication I explored the implications of inflation and the cost of living. One year on we are starting to see this bite and our key goal has shifted to membership growth/ new member acquisition in direct response.

How do we know all this?

Source 1: The Influence 100 Financial Benchmarking Report Insight

Each year the MemberWise Network publishes the Influence 100 List — a list of the largest 100 membership bodies in the UK/Ireland. The list is complimented by 'deeper dive' resources like the Influence 100 Financial Benchmarking Report — a report written by leading accountancy firm, Price Bailey LLP, that analyses the published annual financial accounts of these organisations and provides a clear snap shot of exactly what is going on from a sector wide perspective.

This year the key theme was that, on one hand, the total annual membership body income had risen (by over £434M to £5.15BN) and so have the total number of members (40M members in total with a 426,000 increase this year). Hurray you may cry, however, costs have risen disproportionately and the increase in subscription income does not cover the total cost of servicing our members.

Membership bodies that rely solely on annual subscription incomes therefore need to increase fees more rapidly (in line with inflation) and/or invest more time and resource into a wider portfolio of products/ services. Our report indicates that a mixture of the two seems to be the way forward.

In response membership bodies are investing more in business critical systems to enable more diverse income generation (this year alone saw an increase in investment of £500M).

Previously this spend would be focused specifically on traditional AMS/CRM system purchase/upkeep, however this has now broadened out to include more sophisticated content management systems (CMS) for websites, new Learning Management Systems (LMS) that can enable the provision of interactive/purchasable learning experiences/courses and online community platforms that can enable constant/consistent online engagement with the ability to up/cross-sell content, products and services. The income generated from this new activity is currently £153M per annum. We expect this figure to increase over the coming years.

Source 2: Digital Excellence (2023/24) Survey Results

This year we surveyed 600 membership and association professionals on the topic of digital transformation as part of our Digital Excellence research (now in its eighth year).

We asked, "What is getting in the way of your association developing and growing?"

Here's the top ten blockers:

1. Inadequate website and AMS integration
2. Inability to measure online member engagement
3. Inability to automate administrative tasks
4. Multiple databases and silos of information
5. Inadequate online member self-service functionality
6. Lack/limited personalisation on your website
7. Lack of data or inadequate data management
8. Inadequate reporting tools
9. Silo working/staff culture
10. Inability to effectively communicate member value.

You can see the running theme here is system and process integration and silos of data as well as more human resource factors kicking in at 9 and 10.

So, we've all got appropriate strategies, plans and roadmaps in place to address these issues, right?

Wrong.

In 2023 we can report:

• **27 per cent of UK/IRE membership bodies have a Member Engagement Strategy in place.**

• **23 per cent have a Member Engagement Plan.**

• **27 per cent have a Digital Strategy.**

• **15 per cent have a Data Strategy.**

So, in order for membership bodies in the UK, Ireland and beyond to move forward we suggest four key actions:

1. Create robust strategies, plans and roadmaps that align to your corporate strategy.
2. Invest appropriately in current and new technologies (up to 10 per cent of annual income).
3. Do not rely on membership subscription income alone. De-risk this via a product/service portfolio approach.
4. Take your staff with you. They will need to have the appropriate insight, training, skills and knowledge to make the above happen.

Richard has over 23 years of experience in the membership and association sector. He is a passionate and dedicated thought leader and champion for the profession. He founded and currently chairs The MemberWise Network, the largest and most popular free network in the UK and EU for over 8,000 membership and association professionals.

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The future of membership association renewals: Embracing AI and renewal culture

Kayne Franich ■

In recent times, membership organisations have shifted their focus and discipline toward member retention. Thanks to technology, associations have transitioned from slow, paper-based, and cumbersome member renewal processes to streamlined, online, and highly targeted methods. However, with the rapid ascent of AI and ChatGPT, many of these recently adopted renewal strategies may soon seem antiquated. This raises the question: What does the future hold for member renewals?

The Future of Member Renewals

Not too long ago, the process of reviewing member data leading up to a renewal cycle involved segmenting members based on size, region, join date, and member category. Many of us can recall the days when member renewal notices were meticulously placed in envelopes, accompanied by glossy brochures listing the "Top 10 Reasons to Renew!" Fortunately, these days should be behind most membership associations.

Association Management Software (AMS) and various other technology integrations have empowered membership organisations to personalise their renewal strategies significantly. Today, with the explosive growth of AI and ChatGPT, these technologies can play a pivotal role in renewal strategies by generating accurate forecasts, creating tailored re-engagement prompts, delivering personalised content based on member actions (or inactions), launching dedicated renewal microsites swiftly, and providing round-the-clock AI-assisted services through chatbots and virtual assistants. AI innovation is the new frontier for reimagining how membership organisations can maximise their member renewals.

Beyond Member Engagement

Historically, many membership organisations focused their engagement strategies on transactional objectives such as event attendance, newsletter subscribers, or new online community members. These metrics fail to truly delve into the hearts and minds of members to understand their experiences. The good news is that AI can come to the rescue.
AI tools can analyse vast and complex datasets to examine member behaviors, usage patterns, satisfaction levels, and sentiment, identifying correlations, anomalies, and making recommendations. This enables the identification of at-risk members and member advocates, providing invaluable insights to enhance member retention.

AI and ChatGPT can also inspire the reimagining of renewal processes, emphasising member experiences by simplifying workflows, automating processes like contact requests, integrating chatbots and AI triage, and offering AI-driven content cues. This leads to a more efficient, rapid, and productive member experience, reducing costs while allowing organisations to allocate resources to high-touch, personalised engagement throughout the member renewal cycle.

At renewal time, AI can excel in analysing extensive member experience data, optimising self-service, and member support, ultimately elevating the member experience.

Challenges Ahead

While AI technology continues to evolve, its potential positive impact on member renewals will inevitably grow. Challenges persist, including concerns about the quality, consistency, and availability of member data held by organisations. Understanding the logic behind AI decisions is crucial for validating outcomes. Moreover, AI isn't a set-it-and-forget-it solution; it demands significant investments in time, resources, leadership, staff upskilling, and a reimagination of core member renewal processes.

The Human Touch

Although AI is evolving rapidly, adopting AI technologies doesn't guarantee automatic increases in member renewal rates. AI innovations like predictive analysis, automated communications, virtual chat, and personalised self-service can indeed deliver tangible benefits. However, as with any successful member renewal process, a human touch remains essential.

Gone are the days when member renewals rested solely on the shoulders of a solo membership manager. Achieving successful member renewals requires an organisation-wide approach, involving everyone from front desk staff to the CEO, each playing their part in maximising member retention. Establishing a strong organisational renewal culture and fostering enthusiasm around member renewals allows membership organisations to leverage the skills of all staff through multiple touchpoints.

AI technology can aid in embedding an organisational perspective of member renewals by providing deeper insights and facilitating the creation of cross-functional teams dedicated to managing member churn and maximising retention.

Striking the Right Balance

The future of membership renewals lies in striking a balance between adopting AI innovations that streamline operations, offer predictive capabilities, and create more personalised member experiences, while also fostering an embedded renewal culture. AI will undoubtedly become another tool in the toolbox that membership organisations can employ in their ongoing efforts to renew members.

In conclusion, the future of membership association subscription renewals is poised for exciting changes as AI and ChatGPT continue to transform how organisations engage with their members. By embracing these technologies while maintaining a strong renewal culture, membership organisations can navigate the evolving renewals landscape effectively and maximise member retention.

Kayne Franich has immersed himself in membership organisations for over 15 years. Having led the membership services, growth, retention, and engagement strategies for membership associations in New Zealand. Kayne is currently the Membership & Sponsorship Manager at Property Council New Zealand.

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Five breakthroughs in membership marketing

Chris Vaughan ■

Traditional membership marketing is predictably low return and has stayed the same for years. Most associations were slow to adopt email marketing when it came on the scene in the mid-90s. Today, 85 per cent of associations use email, and 48 per cent say it is one of their most productive channels. Still, click rates remain low, on average less than 2 per cent.

Many associations have delved into social and digital advertising but have failed. Only 14 per cent say social media is effective, and 10 per cent say the same of paid digital.

The good news is that membership marketers can expect a lot better. We have recently tested innovations in membership segmentation, targeting, messaging, and advertising that performed four to nine times better – in one case, twenty-seven times better – than the old-school tactics they replaced.

Focus On Your "Customers"

As I have written previously ("How to Make Your Customers Your Best Members") your members are not your only customers. Your organization has relationships with many other people who interact with you differently. They attend your events, take your training, and write for your journals. One client calls them "ghost members," people who are with you in spirit but not in membership.

It is a truism in marketing that your best prospect is the customer you already have. Why? On the one hand, they know you, so you don't have to work hard to introduce yourself. This is even more important than you might think. Most associations have less than 35 per cent awareness across their trade or profession.

Moreover, your customers see you as valuable in some way, so you don't have to do so much to convince them. Most importantly, you know them. You know who they are and what they like, which is more than half the battle in marketing.

If true, your non-member customers should be your best membership prospects. But are they? We tested sending the same emails to a list of non-member customers and a rented email list of cold contacts. The emails sent to non-member customers performed 8.6 times better than emails sent to cold lists. Not to mention, the rented list was expensive, and the customer list was free.

What does this tell you? First, you should be marketing membership to your non-member customers. But also, you should be actively cultivating your list of those customers by capturing opted-in emails at every touchpoint you can.

Lapsed Members can be your Easiest New Members

In a previous article ("Baby, Come Back! How to Win Back Lapsed Members and Why You Should"), I explained why lapsed members are an even more under-tapped audience. Most associations move on from members who don't renew after a month or two. Some may try to win them back but then give up. This is often short-sighted.

Lapsed members do ghost members one better: They not only know your organization, they also know your membership experience and saw value in it when they joined. Members don't lapse because they hate you. They lapse because they don't see your value at that moment.

Are lapsed members a lost cause, or can you remind them of your value and bring them back again?
At the American Lung Association (ALA), 75 per cent of their donor file had been dormant for as long as two years. Historically, ALA had forgotten about them and focused all their efforts on finding new donors.

We helped ALA develop an email campaign that built on what ALA knew about these donors, namely, what they cared about. Of all ALA's great work, people gravitate to four significant issues: clean air, lung health, and smoking cessation. They sent messages that spoke to lapsed donors about what they cared about – and only what they cared about – inviting them to be part of the solution again.

The result? In one year, they reactivated 7 per cent of their lapsed members. In two years, ALA grew their donor file by 50 per cent — over 600,000 active donors – by focusing on long-forgotten lost causes.

Segment by Interests

A significant reason for ALA's success was segmentation by interest. Sending clean air messaging to people they knew to care about clean air was many times more effective than their old, unfocused messaging. As we have found ("Is Your Member Segmentation Strategy Wrong?"), organizations do not segment their messaging at all or segment it based on career stage or employment setting, which is seldom effective.

In another powerful example, we helped the American Medical Association (AMA) analyze their member data to arrive at four interest-based segments: Advocacy, Practice Improvement, Patient Outcomes, and Medical Education. Segmenting their marketing this way helped triple their member growth in one year.

This is one way targeting your customers and lapsed members can pay off big. Because you know their interests, you can segment them effectively. In our most recent test, a leading engineering society used data they had collected on "ghost" members to identify the specific technical interests of their prospects. It tested interest-based messaging against their standard "generic" messaging. The interest-specific messages performed four times better than the generic ones.

Make Email Personal Again

Email is the mainstay of many membership marketing programs, but it has become less effective as people have tuned email out. Of the nearly 145 billion emails sent daily, 84 per cent are considered spam. A full 54 per cent of email users delete or ignore spam. You don't think your membership emails are spam, but your prospects probably do because it looks like commercial email.

People like personal email, however, and a more personal approach to membership email can be far more effective. In another recent test, we sent a series of emails to prospective members that appeared to come from a well-known member of the society (with their permission, of course). The subject line was personalized, and the body of the email was a short, personal invitation to join the organization.

This straightforward approach has powerful results when done correctly. In our test, people clicked through personal emails twenty-seven times more often than impersonal messages and enrolled five times more often.

Take Another Look at Digital

At the beginning of this article, I pointed out that most associations need better results from digital advertising. Traditional banner and search ads are expensive, and the results could be better. Newer, less conventional advertising can be far more effective when correctly integrated with email campaigns.

All major digital advertising platforms (Google, LinkedIn, Meta) can target custom audiences. That is, provide them with a list of individuals you want to reach and advertise only to them. Because it is so targeted, it is a far more efficient way to advertise. We have found that the most effective way to use custom audiences is to support your email campaigns.

Using this approach, prospects who receive your emails are exposed to your digital ads simultaneously. The ads increase awareness and offer another way to respond, improving the success of your campaign.

Five breakthroughs in membership marketing

In one recent test, we created a custom audience on LinkedIn comprised of prospective members identified using the tactics discussed above. These individuals received membership marketing emails and were exposed to LinkedIn ads simultaneously.

The emails with digital ad support performed 22 per cent better than emails without digital help. Because LinkedIn ads are pay-per-click and the primary purpose of the test was to drive email response, the cost of the ads was significantly lower than a stand-alone digital ad campaign.

LinkedIn also offers sponsored messaging, which allows you to reach prospective members in your custom audience via direct messages that appear to come from another LinkedIn member. In another recent test, we sent personal messages to a custom audience, like the personal emails discussed above, personally inviting prospective members to join the organization.

This tactic yielded open rates as high as 56 per cent — more than seven times better than traditional emails sent to the same list. This approach was far more efficient than regular LinkedIn ads, yielding three times more click-throughs at only 6 per cent of the cost.

Conclusion

These next-level membership marketing techniques deliver transformational membership results. New ways of targeting the best prospects, segmenting your audience, and reaching them in new ways with new messages can revolutionize recruitment. Best of all, they are well within reach of any association that wants to take their marketing to the next level.

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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International value – by default or by design?

Sylvia Gonner, CAE ■

Any well-established association with an online presence is by default reaching audiences and potential customers around the world. Increasingly domestic associations located in leading markets for their profession or industry attract international members interested in their services. Some associations see this movement as an opportunity to proactively expand into foreign markets and become international by design. To benefit from this international exposure, whether by default or by design, associations must pay close attention to their value proposition. Otherwise, those international by default will miss the opportunity and those international by design will potentially waste it.

For a value proposition to transcend the international marketplace, it must have global appeal. That means understanding and fixing what's missing in the following areas:

- **Applicability –** is the content relevant to audiences around the world?

- **Accessibility –** can diverse audiences easily access the offerings?

- **Acceptability –** are messages presented in a culturally acceptable way?

- **Affordability –** are prices affordable to customers in various countries?

- **Adaptability –** how can associations adapt their value proposition?

Making it Applicable

By default
National associations that lead their industry or profession often have some global appeal by default when their standards and know-how serve as models elsewhere, and their certifications, training and events are considered best-in-class.

This will attract foreign customers even if the products and services weren't intended for international audiences.

What's missing?
However, products and services created strictly for a domestic market may have limited applicability (think relevance) in other countries, particularly when the content is strictly based on national market conditions, laws, and other geo-centric circumstances. This is common for training courses, white papers, and news articles where international customers typically question the value of localized materials. Low relevance creates dissatisfaction and ultimately a missed opportunity to retain and grow the customer base.

By design
Associations that proactively wish to enhance their global appeal address the applicability of their content to international audiences by first identifying and then eliminating what is strictly national from their products and services. Where national references are important to maintain for their primary domestic market base, these can be detached from the core, global content into separate case studies, modules, or chapters. Over time, associations that are international by design involve experts from various regions into the content creation from the start to ensure its global applicability.

Making it Accessible

By default
The shift to online training, hybrid events, and digital publications is by default creating access for those located across geographic borders. Audio and visual accessibility features now integrated within many platforms also create value for international and foreign language markets.

61

International value – by default or by design?

What's missing?

Yet appeal across borders is diminished whenever webinars, online courses and conferences are conducted live as they won't accommodate all international time-zones. Likewise, associations that promote their in-person domestic conferences and networking opportunities as part of their core value proposition will also fall short with foreign customers due to the added costs and difficulties of international travel.

By design

Conversely, organizations that are globally accessible consider language, distance, and technology when designing all their offerings. They extend their customer service hours to cover other time zones, go hybrid with their live events, offer recorded sessions on demand, and even hold events in other regions to reach those audiences in their markets. They shift to technology specifically designed to enhance global accessibility of their entire catalogue of offerings, including foreign language translation options.

Making it Acceptable

By default

Language and images reflect our cultural norms and values which vary greatly across borders. Many forms of written and spoken vernacular as well as images and photographs will instantly localize an association. Organizations that already focus on enhancing their domestic diversity and inclusion are by default introducing more culturally acceptable language that helps their image not only at home but also abroad.

What's missing?

Yet that's not likely enough for international audiences who may perceive an association's website, speaker presentations, and marketing materials as out of touch with what they're used to. Chances are they'll be confused by local expressions, and references to localized terms such as seasons, locations, public figures, social trends, etc.

They may even come across information or pictures considered inappropriate in their culture.

By design

Associations that design for cultural acceptability build certain guidelines and steps into their processes to avoid mistakes and missed opportunities to appeal globally. They create language glossaries and style guides to be used by the association's writers, creators, and speakers; they engage diverse viewpoints to scan draft materials for potentially confusing or sensitive information, then re-design them for global acceptability.

Making it Affordable

By default

By default, associations typically deal with affordability issues when creating different pricing for students, academics, and retired members. Those domestic pricing models often require processes to verify eligibility, adjust accounting and IT systems, and conduct cost/benefit analyses.

What's missing?

While these will be helpful when considering international discounts, there's added complexity when addressing price affordability on a global scale. Many associations struggle to find fair and simple pricing solutions that also accommodate currency exchange rates and fluctuations for a multitude of countries.

By design

To help categorize countries into discount groups, it's common practice among global associations to use international indexes published by the World Bank and the International Monetary Fund. However, pricing fairness can be tricky if other aspects of the value proposition aren't addressed first. Typically, associations offer deeper discounts until their products and services are equally relevant and accessible in those markets.

Making it Adaptable

Having a localized, one-size-fits-all value proposition is the biggest barrier to achieving global appeal. Adaptation is key. Domestic associations wishing to leverage their international reach should take incremental measures to adapt because it's easier to transition than to transform. Most importantly, they need to consider that preparation is key to adaptation. Adaptation as an afterthought can be costly, time consuming, and often lead organizations to second-guess or abandon their global expansion efforts. Rather, associations that effectively design for adaptation learn to adopt a product development process that considers a global appeal from the start, and they purposefully design programs and content at the source that will facilitate localization down the road.

Associations that pay attention to, and learn to adapt, their value proposition to make it more applicable, accessible, acceptable, and affordable across borders will reap the benefits offered by the international marketplace, whether by default or by design.

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Tapping into the wisdom of the room:
Why member-driven initiatives mean growth

Nigel Collin ■

There's a wonderful not-for-profit organisation in Alice Springs called Purple House. It's an indigenous-owned social enterprise that provides health services in remote areas, so First Nations people can stay in country and with their community.

I had the opportunity of interviewing the CEO Sarah Brown, when touring the Northern Territory for 'Ingenious Oz Project, she told me, 'Our bosses are the patients and their families. They're the ones that decide what happens here. They're the ones that decide where we go next'.

It's brilliant. It's simple. And if you replace the words 'patients' and 'families' with 'members' and 'stakeholders', it's highly relevant to associations. To take it one step further, it's not just about listening to members it's about adopting their ideas and initiatives.

It's like grassroots or employee-driven innovation where viable and workable ideas are spawned from those on the front line who see things the executive team, who are focused on the big strategic picture, miss. But if leaders can empower their people to find gaps (problems and opportunities) and act on them, there is a massive upside to tapping into the proverbial wisdom of the room.

The benefits are twofold.

It Means Initiatives are 'Fit-for-Purpose'

Your members know their business, market, processes and challenges better than anyone else, so they are more likely to suggest ideas and initiatives that are viable, and purposeful.

We advise our clients to encourage their teams to be 'gap hunters, not idea hunters' because ideas are a waste of time unless they solve a specific problem or leverage a specific opportunity. Successful organisations understand the value of finding gaps and then ideas to resolve those gaps to give them a competitive edge.

It Increases 'Ownership'

Henri Lipmanowitz put it nicely when he wrote:

"Ownership is when you own or share the ownership of an idea, a decision, or an action plan; it means that you have participated in its development, that you chose of your own accord to endorse it. It means that you understand it and believe in it. It means that you are both willing and ready to implement it.

Buy-in is the opposite: someone else or some group of people has done the development, the thinking, the cooking, and now they have to convince you to come along and implement their ideas/plans".

So, it's ownership we want because you can force buy-in on people but ownership must be taken, and when people take ownership, it results in greater retention, engagement, advocacy and contribution.

The question is then, how do you encourage and empower member-driven initiatives?

1. Give permission

People generally won't give you their ideas if they don't feel they have permission. Either they feel their ideas will fall on deaf ears, be ridiculed, done poorly, or taken out of their hands. But if you create a safe place and encourage people to contribute, they are more likely to.

2. Actively listen

I'm putting it out there; Most people don't feel they're being heard when they put forward ideas. Sure, they may get an email thanking them but that's where it ends. I once received a brief from an organisation that wondered why the number of ideas put forward for their innovation competition diminished year after year. It turns out they never got back to those who contributed, thanked them, or let them know the outcome.

3. Let them know what's in it for them

Members need to understand the value of contributing. Not in a general, feel-good way but in a tangible way, in terms of the benefit to their business, people, clients and bottom line.

4. Facilitate hackathons, brainstorms, collabs, or whatever you want to label them

You need to create a process for members to actively put forward initiatives. If calling member-driven initiatives is random or just a 'general thing' you do, the importance and potency of it becomes diluted. Think about facilitating 'idea meetings' (we call them Gap Meetings) where the purpose is to uncover those hidden gems of ideas and spark a solution.

5. Build feedback loops

One sure way to kill off member-driven initiatives is to take members out of the loop. Not just the communication loop but the development loop. You want to maintain access to the wisdom of the members not just to start ideas, but to help develop them. And remember that builds ownership as well.

6. Accept and process failure

If you're going to encourage member-driven initiatives, then you also need to accept failure is going to be part of the course. Of course, that's much easier said than done because none of us want to fail. But what if you put a process around failure so that it becomes a valuable resource? For example, in a 2016 Harvard Business Review article, Julian Berkinshaw and Martine Haas suggested using 'failure reports' to document the lessons from failure and build a pool of knowledge for future use.

A Final Thought

In writing this, a number of questions keep coming up. In business do we fully understand the wisdom of the room and the genius that lies in our membership? And if so, are we nurturing and leveraging it? Or are we letting slip through our fingers a wealth of ideas and initiatives? If we can shift our thinking and put the right processes in place for our members to feel empowered in putting forward ideas, imagine the momentum and sustainable growth that would create.

Nigel Collin MBA is an International Speaker and strategic facilitator in engaging people for bottom-up innovation through small, consistent steps. He is the founder of 'Ingenious Oz Project' and author of 'Game of Inches: why small changes win big results'.

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Using relationship segmentation to inform your membership offer and package value

Sue Froggatt ■

There has been a big change in the concept of membership.

I'm referring here to the commercial sector which has enthusiastically embraced the membership model. Spotify currently boasts more than 500 million members, while Amazon Prime and Netflix both have over 200 million.

These streaming services invite customers to join as members because the opportunity to generate a regular perpetual income stream is very attractive.

You could argue that customers are in fact subscribers, but the fact remains people see themselves as members.

This change in definition could be the catalyst for a rethink within association membership models.

A Different View

Consider being in the association industry first and then segmenting by relationships.

This opens a continuum and framework for thinking about how your community wants to connect with you.

One segment would be members, but it could also include other ways to associate and connect with your association at a lighter, or a deeper, level.

The range of options could include:

- **As a customer:** Customers come and go. They buy products and services. Building a relationship is not important.

- **As a subscriber:** They want to sign up for a product that is regularly sent to them, like a newsletter, but again building a relationship with the supplier (or other subscribers) is not expected or needed. (The new definition of membership?)

- **As a supporter or fan:** This group want to cheer from the sides.

- **As an activist:** They want to influence change and actively support causes that are very important to them.

- **As a member:** Members want to join, engage and gain advantage from being associated with a group of others with similar needs. (Our traditional definition of membership?)

- **As a volunteer:** Volunteers are happy to freely give their time, energy and give something back to a worthwhile endeavour.

- **As an investor:** This group wants to give financially, preferably to a relevant project that will reap rewards.

Your community will now have a variety of ways to associate and connect, and they can move up or down the continuum to suit what is happening in their lives.

It is not difficult to see the parallel in everyday life and this thinking is just an extension of what we do naturally. We have acquaintances, friends, close friends and partners. We have different types of relationships defined by how much time and energy we invest in being with them.

Where is this Happening?

I can list several examples of associations using the approach outlined above:

- A food trade association has gained great success inviting the customers of its members to sign up and become product fans. The fans have supported the association in its lobbying activity.

- A professional institute discovered the financial contribution of non-members was actually greater than members! This group of non-members had a short-term need for content and did not want to join, but they were happy to become subscribers.

- A Chamber of Commerce invited its local business community to become investors in projects of their choice to support business growth.

- A health professional association made a clear distinction between supporters and members – highlighting membership was for active contributors. (Members who do not contribute move to being a supporter.)

- A charity with a large community of volunteers working to support them. Their volunteers don't have to be members.

Based on a greater understanding of the relationship, you can build value packages that reflect the level of investment and commitment anticipated and expected.

You can still distinguish between different types of members, but it prevents people or organisations from joining as members, when there is a better fit that can be offered to them.

Over the years I have witnessed various retention problems that have been created when the focus was placed on prioritising membership.

The first problem stemmed from offering discounts on conference places to non-members on the proviso they signed up for membership. If they only really want to be a conference customer, and decide to join for the discount, you are generating a retention problem for the following year.

The second problem was when students were signed up for a free membership, but few renewed after they graduated. They might not have a realistic concept of what a professional membership is about, or worse, don't realise they are a member. Maybe asking them to become a customer for a 'passport into work' (used to collect evidence of different experiences) would be something they could relate to and see value in. Once they get to know more about you as a customer, they might be happy to sign up as a member.

The concept of membership as we know it is being redefined by what is happening in the commercial sector. By putting the association first, and then segmenting members according to the type of relationship, you have greater flexibility and scope to evolve and respond to a new generation who have a different concept of what membership offers.

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Navigating the complex workplace laws:
How associations can support their members

Carolyn Grant ■

In today's ever-evolving work environment, navigating the complex landscape of workplace laws can be a daunting task. The increased focus on mental health and well-being has resulted in new Codes for each state with increased clarity and responsibilities move from a responsive model to a preventative model and this is causing a lot of trouble within organisations as they grapple with outdated constitutions, rogue members, failing policies and procedures and eroding trust.

These crucial aspects of modern employment not only shape the well-being of individuals but also have significant implications for organisations and how they operate.

People Plus Science CEO, Carolyn Grant says, "Associations are in a perfect position to assist their members gain scale, access and data to not just meet compliance but to inform, educate and fast track the benefits of these legal obligations". By building capability in these areas they can create new products and services that enhance their own reputation, grow revenue and reduce their own risk. Likewise, they help their members mitigate their risk, their exposure to reputational harm, and can reduce significant costs whilst reaping the rewards of improved productivity. It's a win win.

So What do Associations Need to Know:

Psychosocial hazards: Under the model WHS laws, a person conducting a business or undertaking (PCBU) must manage the risk of psychosocial hazards in the workplace. A psychosocial hazard is anything that could cause psychological harm (e.g. harm someone's mental health). Common psychosocial hazards (stressors) at work include:

- job demands
- low job control
- poor support

- lack of role clarity
- poor organisational change management
- inadequate reward and recognition
- poor organisational justice
- traumatic events or material
- remote or isolated work
- poor physical environment
- violence and aggression
- bullying
- harassment, including sexual harassment, and
- conflict or poor workplace relationships and interactions.

All organisations need to have engaged and consulted with all staff to identify and mitigate psychosocial hazards. This also includes contractors, suppliers, customer and members.

Respect at Work Laws: Under the Sex Discrimination Act, organisations and businesses now have a positive duty to eliminate, as far as possible, the following unlawful behaviour from occurring:

- discrimination on the ground of sex in a work context
- sexual harassment in connection with work
- sex-based harassment in connection with work
- conduct creating a workplace environment that is hostile on the ground of sex
- related acts of victimisation.

Importantly, the Sex Discrimination Act requires businesses to take proactive action to prevent discrimination and harm from occurring in the first place. These changes to the law require a systemic shift from responding to harm after it happens, to preventing it before it occurs.

The Commission has new powers to investigate and enforce compliance with the positive duty. These powers will commence on the 12th of December 2023.

The Risks are Real

"These are significant changes for any business operation. Associations are at just as much risk as their members. For example, we are having to deal with outdated constitutions that are in conflict with the legal and regulatory requirements on how to deal with sexual harassment or bullying from elected members or members" says Carolyn.

"The Event landscape is becoming increasingly risky with sexual harassment and inappropriate behaviours from guests, members or staff. Our policies and procedures are not up to date, our responsiveness to incidents is too slow (oftentimes expecting people to wait for a monthly or quarterly risk committee to discuss the infractions). Staff being bullied by elected volunteer members or volunteers being bullied by staff with no appropriate processes in place."

Associations who rely on government funding for revenue but have high turnover and a reputation for toxic cultures and complaints, are at risk of losing their government funding.

Organisations who are thinking about digital transformation or a change project should ensure that they look at a "readiness score" of their teams and contractors to ensure risks are being mitigated.
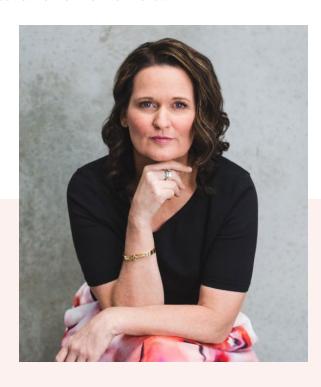
The Role of Associations

Associations are well-versed in the specific challenges and nuances of various industries and professions. Here's how they can position themselves as thought leaders and innovators to address member needs and build sustainability into their own practices.

1. **Educational Resources:** Associations can develop and provide educational resources, such as workshops, webinars, and training programs, tailored to the unique needs and challenges of their members. These resources can cover topics like recognising and addressing workplace harassment, creating inclusive cultures, and promoting open and respectful communication.
2. **Policy Guidance:** Associations can offer guidance on developing and implementing workplace policies that align with respect at work laws and promote psychological safety.
3. **Networking Opportunities:** Associations facilitate networking among members. This collaborative atmosphere can help members gain insights into how others in their field are addressing psychological safety and compliance with workplace laws.
4. **Advocacy:** By engaging with lawmakers and regulators, these organisations can work to ensure that the legal framework is aligned with the evolving needs of their members.
5. **Legal Support:** For members facing complex legal issues associations can provide referrals to legal experts who specialise in employment law, ensuring that members have access to the right legal resources.
6. **Industry Analytics and Thought Leadership:** Using industry data, create thought leadership and educate members on trends, challenges and strategies. Assist members be proactive in managing workforce strategies, cultures, risk, reputation and growth opportunities.

Promoting a Culture of Accountability

In addition to these tangible resources, associations can play a critical role in promoting a culture of accountability within their respective fields. As workplaces continue to evolve, the support and guidance provided by associations will prove invaluable in building a safer and more respectful work environment for all.

Carolyn Grant is an organizational growth strategist who translates neuroscience into business insights, tools and frameworks to drive revenue, protect reputation, and reduce risk with People first strategies – a focus on leaders, culture, teams and individual psychological safety.

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The community wow factor: Why weird is better for cultivating member communities

KiKi L'Italien ■

Why is online community engagement sometimes so difficult in an increasingly digital world? Shouldn't it be easier? While the technology solutions available to us have increased in capabilities, associations continue to face the challenge of keeping members engaged meaningfully when they aren't attending in-person meetings.

Buying a tech solution or creating a bunch of groups on a platform doesn't work. We need a structured approach to breathe life into digital communities and move them from "weak" to "WOW!"

"WOW" is finding the right people.

"WOW" is the desire to not miss anything important because there's always something important being shared in the group.

"WOW" is the feeling that members have when they realize they have found a community that really understands their needs and provides value right away.

And it's this W.O.W. Framework that I use to help guide online community development.

What is the W.O.W. Framework? WOW is Weird, Organic, Workable —an innovative strategy for associations to build, grow, and sustain digital communities.

The W.O.W. Framework Explained

With all of the competition for attention in the world, in a sea of mediocre options increasingly run by automated messaging and marketing sequences, the easiest way to stand out quickly is to do just that...STAND OUT.

That is where WOW comes in and here is what WOW is all about:

W is for Weird: Aspire for Unique and Ground-breaking Strategies

Look, innovation is key. Standing out in a crowded digital space requires strategies that are unique and ground-breaking. Having a distinctive identity as a group and what it has to offer is a strength. Associations must create a digital community that offers something no one else does, ensuring you provide unique value to your members.

O is for Organic: Allow Strategies to Adapt and Evolve

Flexibility for change is critical when the digital landscape is ever-changing. Your strategies need to be adaptable to maintain a vibrant community. Organic means the community is also member-driven. Let the needs and feedback from your community guide your adaptations and improvements. That doesn't mean a community doesn't need a manager. It does. However, the community should guide the direction conversation and growth take.

W is for Workable: Balance Innovation with Practicality

Are your ideas for community feasible? Your revolutionary ideas must also be practical and implementable. This means looking at resource management and determining if you can balance your aspirations with the available resources, including time, budget, and manpower.

Real-World Application: Case Studies

Optica (formerly OSA, Optical Society of America)

At Optica, we applied the W.O.W. Framework to revamp the community for student chapter leaders. Under the "Weird" principle, we introduced an innovative international program that connected young professionals with seasoned experts in the field, providing a unique value proposition for members. This program was called iONS for "International OSA

Network of Students," and it was a grassroots member-led initiative created out of a simple Facebook group of leaders who were asking for permission to create this new thing.

For "Organic," we continuously adapted the platform based on real-time analytics and member feedback. Finally, "Workable" was exemplified by streamlining backend processes to ensure the program was easy to manage, maintain, and scale as it grew into something with its own line in the budget.

Association Chat

When Association Chat, a 15-year-old online community and podcast for the association industry, applied the W.O.W. Framework—Weird, Organic, Workable—the community underwent a transformation that resulted in increased member engagement, content interaction, and sponsorship opportunities.

Weird: Pioneering Interactive Content

To stand out in 2021, Association Chat introduced a series called, "21-in-21," an innovative twist to the standard podcast format. These sessions were not typical association topics (they featured everything from "leadership lessons learned in roller derby" to "mindfulness in managing tech." These were areas of expertise and interest that Association Chat community members offered to teach themselves, making for incredible user-generated content. Interactive Q&A segments, real-time polling, and even impromptu guest appearances made each event unique and engaging.

Organic: Member-Driven Content Curation

Based on member feedback and analytics, the content strategy continuously evolved. Weekly themes emerged from member discussions, and popular topics were spun off into separate forums and deeper-dive content pieces. This organic growth ensured the content stayed relevant and engaging for the community.

Workable: User-Friendly Sponsorship Packages

From a business standpoint, the community needed to be financially sustainable. The "Workable" element came into play by introducing tiered sponsorship packages that were easy for potential sponsors to understand and for the internal team to manage. These packages ranged from sponsored posts to virtual event collaborations, balancing innovation with practical revenue generation.

So, was it successful? The metrics suggest it was.

- 25 per cent increase in online community membership
- 40 per cent increase in podcast downloads
- 30 per cent rise in sponsorship inquiries.

The W.O.W. Framework proved instrumental in elevating the Association Chat community. By blending unique strategies with organic growth and practical implementation, the community not only grew but thrived, demonstrating the framework's efficacy in building robust digital communities.

The Challenges and Pitfalls of Being Weird

The "Weird" elements of the W.O.W. Framework might seem risky to some people. As with any project, it's helpful to present data that validates your ideas for innovative approaches and encourages buy-in from stakeholders.

But also understand that small bets can pay off big.

The Future is W.O.W.

By applying the W.O.W. Framework, associations can create digital communities that not only engage but also retain members in a meaningful way. The framework allows for the balance of innovation, adaptability, and practicality, making it a comprehensive strategy for digital community building.

Eager to transform your association's digital community? Take the conversation further. Join the Association Chat community on Facebook, listen to the podcast, or sign up for the newsletter by visiting AssociationChat.com.

KiKi L'Italien is the CEO of Association Chat and Amplified Growth. Specializing in digital strategy and community engagement, she's recognized as a top association and events professional with awards like the Hall of Fame for Organizational Leadership. KiKi serves as a trusted voice in the association industry. KiKi is also a founding board member of SocialOffset.

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Shaking up your volunteer strategy

Peggy Hoffman, FASAE, CAE ■

The ASAE Research Foundation's latest study on volunteer models offers a roadmap for associations' intent on maximizing the volunteer experience – for the benefit of the member and the mission. And it can't come soon enough. The handwriting has been on the wall – associations have consistently failed to fully resource their volunteer systems. 2024 needs to be a turning point.

We have in the past 3 years innovated our education and digital strategies, our decision-making models and our workplaces. To a certain degree, we innovated our member engagement strategy as well – and yet left the volunteer strategy to age another year.

A new volunteer management model for 2024 looks like this.

Built on Two Critical Elements

A new volunteer management model has:

1. A clearly defined purpose for the use of volunteers (what is their role vs staff) that fully aligns with the capacity of the volunteer pool and the association to support their efforts, and

2. A clearly articulated definition of effective volunteering which is supported through a formal assessment process which enables the association to measure effectiveness of the work, the groups, and the individuals.

Well Defined Structure

A new volunteer management model has a well-defined structure which grounds an association's volunteer management in a clearly defined purpose for volunteers, job design based on that purpose and organizational capacity, a formal, objective assessment process, and well-trained staff.

Excellence Framework

A new volunteer management model has adopted a framework based on the research's characteristics of excellence which support and sustain mutually beneficial volunteer involvement in the mission and work of the association. These characteristics are those seen in associations that generally rate their volunteers as effective and have robust volunteer satisfaction.

These Characteristics of Excellence for an Association Volunteer Model include:

- **Organization culture and commitment –** creating a culture of volunteerism within the organization – among both member and staff – that embraces volunteerism while also providing necessary resources to meet the needs of organization, the staff and the member volunteers and to ensure the association is balancing appropriate legal and operational authority between volunteers and staff.

- **Clarity of purpose and definition of high performing –** creating the organization's purpose statement for engaging volunteers which clearly articulates the impact of a successful volunteer strategy.

- **Holistic and transparent volunteer system infrastructure –** embracing a holistic and transparent volunteer resources management system that addresses the six key elements of job design, recruitment/selection, orientation/training, management, assessment and reward/recognition, and which is aligned with the organization's culture and systems.

- **Commitment to continuous improvement –** embedding into the volunteer system regular and ongoing assessment and modernization practices. This should consist of multiple approaches including a (1) system-wide assessment, (2)

individual group/program assessments, (3) assessment of individual volunteer learning, satisfaction, readiness and contribution, (4) stress tests for DE&I, time to decision, and strategic focus, and (5) updating volunteer systems based on learnings of assessment. The intent is to identify and replicate successes, fill performance gaps and collect relevant benchmarking data to support continuous improvement.

- **Professional development** – committing to ongoing learning for staff and volunteers about the profession/trade, non-profit/association sector, relevant societal and social impact trends, diversity, equity and inclusion.

- **Staff readiness** – investing in on-going training, development and mentoring of staff to support and be partners with the association's volunteers.

- **Information/Knowledge transfer** – enabling the transfer of necessary information, history, trends, and experiences as volunteers and staff change.

- **Anticipatory and responsive** – anticipating changes in the profession, association and society within the context of volunteer management and adapting systems and learning in response.

- **Resource commitment** – investing in the volunteer strategy to continually evolve and innovate the systems including positively impacting how volunteers are able to complete their role.

- **Community focus** – committing to building and nurturing the community engaged in the work of the organization; this is about strengthening the personal and professional bonds across the community.

- **Strong identification and connection to profession/ trade** – tying the volunteering roles to impacting the profession, trade or sector in a meaningful way.

Investment in Staff Training and Support

A new volunteer management model has made an investment in staff training and support for those engaged with volunteers. The readiness of staff has a significant impact on the effectiveness of volunteers. And yet for many associations, serving as a staff liaison is too often included in "other duties".

Three Closing Thoughts

Associations not only rely on volunteers, but volunteerism is also what makes an association what it is. Volunteers represent on average 20-25 per cent of the labor force hours in a typical association. We can't move our mission or meet member needs without them. It is high time we invested in this core element of our organizations.

Members participating in the ASAE Foundation study report they will continue to volunteer. The nuance to that "prediction" is it will only come true if we honor volunteer's time. The study showed that volunteers continued to show up when they were in an appropriate role which used their time effectively and had a meaningful impact on their profession, industry or community.

The success of your volunteer strategy has huge impacts on two other areas: living your association's DEIA commitment and supporting chapters and components. Associations will need to shift their recruitment and selection process to engage a diverse pool of members. Chapters and components must get new volunteer models to succeed. Continuing the same governance model means components will continue to struggle with finding and keeping volunteers.

The ASAE Research Foundation study on A Holistic Approach to Association Volunteer Management offers a process model and other tools for consideration.

Mariner Management led the ASAE Foundation's latest volunteer study in addition to the 2017 study which uncovered the concept of Mutually Beneficial Volunteerism. Mariner works with associations to innovate volunteer and component structures to drive member engagement and organizational success.

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What does not-for-profit actually mean? Is our language holding us back?

Felicity Zadro BA MA GAICD ■

"A language is not just words. It's a culture, a tradition, a unification of a community, a whole history that creates what a community is. It's all embodied in a language," Noam Chomsky.

When I talk to someone from the associations world, we share a language regarding the context in which we work. We use words like member communication, stakeholders, governance, and renewal campaigns, and we know exactly what the other person means.

Language shapes the way we perceive the world and our reaction to it. And yet, one of the most important phrases we use in the sector, is one I believe could be holding us, our teams, and our communities back from reaching our potential: not-for-profit.

The term is often used to describe our organisational culture, the way things are approached and a reason for the prioritisation of our activities. For some, it has come to mean we put people ahead of profit and is often synonymous with charity.

However, I've worked with 74 'not-for-profits' in my career and I have heard the term mean everything from we can't charge a lot for our services, we aren't able to be commercially minded, we don't expect to be paid well, and we can't afford new technology, all the way through to accepting bad behaviour from volunteers, and worst of all not holding people accountable for their actions or the fulfillment of policies and procedures.

But in fact, not-for-profit only refers to how the profits of an organisation are distributed. It is merely a financial term, not a moral judgement.

At the core, the main difference between a not-for-profit and a for-profit organisation is how the profits get directed, whereby a not-for-profit cannot distribute profits to members, a for-profit gets to keep the money they make, share it, reinvest, or spend it as they wish.

According to the Australian Charities and Not-for-profits Commission a "not-for-profit can in fact make a profit, but any profit it does make **must** be allocated towards its purpose".

"An organisation can still be a not-for-profit if it provides a benefit to a member while genuinely carrying out its purpose."

"A not-for-profit is generally an organisation that does not operate for the profit, personal gain, or other benefit of particular people."

The Case For Purpose

Whilst it may seem innocuous to use the term, I feel it is holding us and our organisations back from fulfilling our potential. Why? Because it is often used in the very first sentence of our organisational description, positioning us in the world and eyes of our people and communities.

In strategic communications our 25-word sentence describing our organisations, which is all over our websites, documents and press, is the equivalent of the first smile and handshake.

It leaves an impression. Is it the right one?

In recent years, we have seen a big push in the not-for-profit space to change organisational mindsets to being for-purpose instead.

When we say we are 'for-purpose', I instantly want to know – how are you wanting to change the world, and what role can I play to help? For staff, it can be inspirational, and links more directly to the intrinsic motivation to make a difference. Working towards a purpose is working towards impact, however, working in a not-for-profit can be stunting of energy and drive.

Will Shifting One or Two Words in our Organisation Really Make a Difference?

When I've recommended to organisations to make the shift in their positioning and describe themselves as 'for-purpose', it seems to hit a nerve. If it didn't matter, I wouldn't get that response. Is it because people don't like change? I believe it is because for-purpose widens the ambition and drive and hangs a sign out that says, we stand for something that matters, and we are passionate about achieving it. It certainly raises expectations and drives impetus for results.

For association leaders who are managing their organisational (including membership) cultures, saying you are for-purpose, gives us language to better discuss the reason we are all there in the first place – which supports consensus decision making; it helps us work out if our programs are appropriate, worthwhile and valuable, and it aids us in evaluating our combined efforts.

From a communication perspective, in a very noisy world it helps us clarify the message – tighten the delivery of the brand, galvanise a community, stir emotion, inspire action, attract staff, keep talent, sell tickets, market better and raise funds.

Profit is Not a Dirty Word

All organisations must be commercially viable. Things, people, programs and places all cost money, and we need more and more to do things well. In a for-purpose, we are given more freedom to make money to fulfil our mission. It drives a more commercial mindset as we understand why we are doing it.

Not-for-profit is merely a description of where the profit goes. It's got nothing to do with how we should drive and inspire and connect our communities and the value of the work that we do.

A for-purpose organisation is deliberate, self-determined, explicit and thoughtful in its actions, it is a call to action and a call to arms, and it is focused on achieving its goals.

I would encourage any organisation who calls themselves a not-for-profit to really think about the impact of that language on its culture and the behaviour of its people. Listen out for the conversations about money in your association and the value people place on it.

What could be harnessed from ditching a tax status as your positioning statement and instead having front and centre at every conversation, board meeting, and decision being made, your purpose. This is the change we need to see. The time for not-for-profits is over. The time for-purpose organisations had their time.

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There's a trust vacuum – here's how (and why) professional associations can help fill it

Jelena Li ■

From economic anxieties to climate disruption to the rise of AI, the world's nations are facing significant challenges to business as usual. And almost universally, these challenges are being made harder to overcome because of increasing national polarisation and division.

In fact, recent research shows that many countries are trending towards severe polarisation – and why professional associations should be a part of the path back to cohesion.

The Trust Vacuum

Every year since 2000, Edelman has polled tens of thousands of people across the globe, gauging trust in institutions. This year's research shows trust in government is continuing to fall, which is now viewed by one in two people as unethical, incompetent and a source of false or misleading information. Media are held in even worse regard.

But that's not to say people have no trust in institutions – business and NGOs are both seen as reliable sources of trustworthy information, as well as ethical. NGO leaders in particular are seen as unifying forces.

While Edelman's research does not explore attitudes towards professional associations directly, their position straddling the worlds of business and NGOs clearly indicates where they stand – and why they can play such a large role in filling the growing trust vacuum.

Here are four ways associations can do just that.

Elevate your Expertise

The Edelman research has found that there is one action that is far and away the most effective way to build trust – being a reliable source of trustworthy information.

This should be a natural arena for associations:

· They are the voices for not just some experts but often almost all experts in a given field.

· They are dedicated to the continuing professional development and training of these experts.

· They are long experienced in being sources of reliable information for their members.

Understandably, many associations have not traditionally viewed sharing trustworthy information with the public as a core focus. But doing so can do more than simply build much needed trust – it can also raise awareness of and engagement with an association's purpose, helping align the public (and, by extension, policymakers) with your association's strategy.

Be Strategic with Comms

One of the most striking findings from the Edelman research was in what we believe about how to achieve constructive action.
For all our cynicism about government, people believe government working alone is significantly more likely to be effective than businesses working alone. But crucially, we believe government and business working in partnership is FOUR times more likely to achieve constructive action.

Any professional advocacy effort has a better chance of success when the public are on board, and an association's comms are an opportunity to bring this to life.

Being strategic with your comms means:

• Clearly defining your key messages.

• Tailoring those messages to all your audiences, including members, government and the public.

• Running communication campaigns that put those messages in the formats and channels where each of those audiences are.

Take a Stand

It's no secret that we live in an era in which the public increasingly expect organisations to take vocal stances on the issues of the time. A clear majority of consumers prefer to do business with brands that echo and give voice to their values, and Edelman's research shows that more than four in five people expect business leaders to show strong stances on everything from climate change to inequality.

It can be uncomfortable territory for many associations, who have long prided themselves on being broad churches. But silence is increasingly seen as complicity – particularly among younger professionals.

Bring Young Professionals Along

Edelman's research found that Generation Z was easily the least trusting of government and the media.

Meanwhile, other international research has found not even one in three members of Generation Z feel positively about associations.

This makes the youngest part of the workforce both a big risk and a big opportunity. The trust vacuum is most pronounced with them, but they also have the lowest awareness of the value of professional associations.

Countering this means proving your value to Gen Z – and doing that means building trust.

Why it Matters

Mistrust is corrosive to the flourishing – even the functioning – of any society. This is never more true than when we face challenges that can only be solved on a population-wide scale, like climate change, inequality and ensuring AI is a source of more help than harm.

Associations are in a prime position to be a unifying source, helping advance their nations. And in doing so, they can advance their members' interests too.

Takeaways

• Associations are in a prime position to share their expertise with the public and build trust.

• The public see government and business working together as the best shot at solving problems. Association advocacy – and strategic comms – are a key lever to achieve this.

• Building trust with members (and the community) can mean taking bold stands on big-impact issues, even if those issues are outside an association's core concerns.

• Young professionals offer the biggest opportunity to build trust – and also the biggest potential benefits.

Jelena leads Mahlab's publishing team and works closely with both editorial and commercial teams to shape strategies and drive commercial performance. She has 15 years' experience in audience-driven content creation and strategy and spent seven years building and leading the content partnerships team at BBC Global News before joining Mahlab.

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Changing a brand and shifting a mindset

Jane Carey ■

The Auckland District Law Society Inc., (ADLS) is an association rich in history. Its legacy amongst the New Zealand legal profession is deep. Bringing about change to its DNA has proven to be an exercise in relationship building, education, strategic future thinking and creativity. Not a task for the faint-hearted.

With a CRM upgrade, new website, a membership structure changes underway, an internal strategic roadmap reset and an independent review of the statutory framework for legal services in New Zealand, there was a natural alignment for ADLS to review its brand. We wanted to understand how it is showed-up for members and the wider legal profession.

Undertaking a brand change though, was more than changing our name and logo; we needed to create a close, authentic bond with our members and take them on the journey with us.

Facing the change head-on, we knew there were some key challenges.

Conservative attitudes exist across the legal profession. Compared to other industries, we have found lawyers believe in respect for those with greater years of experience, hard work and self-sacrifice. Typically, they are resistant to radical change and enjoy tradition — doing things the way they've always been done. Whilst generational differences are becoming apparent, at the end of the day, lawyers hold socially traditional attitudes about their careers and profession.

And there was the elephant in the room. Having Auckland in our name made our business geographically exclusive – it was not reflective of our national footprint. The goal in rebranding ADLS was to strengthen our message and geographic reach, and allow it to evolve. We wanted to create a platform from which to thrive and grow New Zealand wide.

For ADLS, changing the brand extended beyond the brand imagery to encompass how members — existing and future — view the organization in enabling their career and business aspirations. In making changes to the brand, ADLS needed to adopt a critical thinking approach to support new business strategies and core messages that would enrich its offering and create a closer, authentic bond with members.

The mere magnitude of the change has not been a sprint, but a full-on marathon. To get to the starting line, the change for ADLS has taken well over 12 months. Two rounds of Council votes, educating members and then asking them to vote on the name change, has taken time.

Our Approach

We needed to know what people really thought of us. Over six months we probed our members and non-members, the wider legal profession and most importantly how our staff and our Council saw us.

We asked about the needs and wants from a law society, how ADLS showed up, we tested four possible brand territories and explored the idea to change our name extending to potential name options.

Our research revealed there were two generational camps, looking for different things from us. Overall, people were open to change across the age and career stage divide.

What we Learnt….

- ADLS needed the ability to speak to both the younger and older mindset who have different attitudes and needs, and are seeking help from different types of organisations.

- Similarly, non-members who feel excluded by ADLS because for instance, geographic and area of practice constraints.

- The future positioning of ADLS must be able to strike the right chord, to be able to speak to the diverse profession in a way that is meaningful.

- Our brand was viewed as functional, and hard to personify. We needed to build an emotional connection with the wider profession.

- ADLS' legacy was a significant part of the legal profession, and we needed to carry this forward.

Most people were encouraging about what ADLS did, which was directed towards our legal forms, publications, and content, CPD training and Committee work. To grow, ADLS needed to harness what it was good at – the functional aspects – and overlay a stronger emotional connection with the profession.

Introducing The Law Association Inc.

The Law Association was borne out of commonality in preferences from our research. We needed a name that was conservative with a sense of importance and formality. 'Association' felt to be more appropriate as it speaks to our membership. The Law Association enabled national awareness and harnessed the sentiment with ADLS.

And we needed our members to vote in favour of it.

With the not too distance memory of a failed name change vote in 2016, taking this to a member vote was the great unknown. This time round, our members were ready for change, encouraging of the new name and the future pathway for the organisation.

Our brand positioning is to enable excellence. Lawyers by nature thrive on doing their best work. Our aim is to help them achieve excellence through the solutions, tools, skills and connections we deliver every day. And by bringing a voice, an identity, and a sense of belonging to our community, we support the collective advancement of legal practices and laws. The Law Association is right here enabling Aotearoa New Zealand's lawyers to take their work, their career, and our profession, to the next level.

The legacy of ADLS will be carried forward with The Law Association – both visually via a monogram and inclusion in our legal forms business, becoming in essence, a product name.

The Law Association launched on 1 October 2023. Changing our brand is not done, it's just getting started. Our goal to be the foremost representative body for the legal profession is now underway.

Jane leads Membership, Marketing and Communications for The Law Association Inc., (formerly ADLS) in New Zealand. An experienced strategic leader, she brings brand, marketing and commercial experience in the membership and association sector. She is an intuitive marketer and with a solid background in the corporate world, enabling her to apply these fundamentals to businesses across a wide spectrum.

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From traditional to transformational:
Event design strategies for profitable association conferences

Paula Rowntree ■

Why is change needed for your conferences to be successful?

Because the world has changed, and with it, your attendees. Their expectations are different, along with the factors that influence their decision to attend your event or someone else's. Change is needed for you to not only maximise the profitability of your conferences, but to also capture and retain your attendees year after year.

There are four key trends conference attendees are looking for you to address in the design and delivery of your conference. In this article, we'll address each of the trends and I'll provide concepts on how you can innovate your conference design to address them.

Trend 1: From Networking to Meaningful Connections

It's no longer enough to run a networking function and expect your attendees to mingle with each other to create their own connections. Your event design needs to foster or create ways for meaningful connections to occur naturally.

Ways to create avenues for meaningful connections to take place:

1. **Create places within spaces:**

    - Move from catering stations to lolly walls, pantry stations and all-day grazing stations to allow attendees to meet at all times, not just during designated breaks.
    - Provide game stations in the exhibition area or foyers such as chess, connect four, scrabble.
    - Build an ice-cream parlour as one of your catering stations.

2. **Immersive and activated learning:**

    - Look at taking your attendees to different locations to learn.
    - Have attendees move within sessions.
    - Encourage your presenters to add interactive components to their presentations that actively have attendees connecting.

3. **Reasons to connect:**

    - Introduce a socially sustainable activity where attendees with similar values can connect i.e. solar buddies.
    - Build a first timers buddy program to help those attending for the first time connect with more seasoned attendees.
    - Create a library in your exhibition area or foyer and ask attendees to bring a book that is important to them. Ask them to put a note in the book sharing why it's important. This provides a place for attendees to find time out and get to know other attendees.

4. **Natural conversation starters:**

    - All of the above help conversations start naturally over shared experiences, shared likes and shared values.

Trend 2: Transformational Experiences

The pandemic taught us a few key things:

- It's easy to access a wealth of learning from our own homes.
- We value being home and having time with our loved ones and being in our own environments.
- Travel, whilst fun, comes at a cost both financially and energetically.

If you want to entice attendees to travel to attend your conference, you must create experiences that cannot be replicated in the virtual environment. Your event must be worth it. A transformational experience is one that leaves your attendee changed in both an epistemic and personal way. In addition to providing outstanding content, your event needs to be personally appealing.

Data is paramount for creating transformational experiences as it allows you to personalise your program in ways you've not had to do in the past. Other ways you can create transformational experiences are through:

· legacy and impact programs
· wellness programs
· social programs and giving back
· immersive education
· inclusivity.

Trend 3: Attention Deficit

We're all used to multi-tasking. Depending on where you were located during the pandemic, you may have been working full time, managing home schooling, supporting elderly and/or isolated neighbours and family, all while trying to keep your own mental health and wellbeing in check. We have watches and devices that tell us when we've been still for too long and are more conscious then ever how valuable our time is. Adults learn differently and require variation to maintain stimulation and attention.

The article by Western Governors University shares some great insights into adult learning. A few ways you can address attention deficit through innovative event design are:

· Provide ways for attendees to actively participate in the learning.

· Offer a variety of session lengths.

· Create silent activation stations in the back of your session rooms.

· Fully engage the senses of your attendees through not only learning tools but also through room design and layouts.

· Move away from designated morning and afternoon tea breaks and allow attendees to self-manage their attention.

Trend 4: Sustainability

In event design, we refer to three pillars of sustainability:

· environmental
· social
· financial.

How you incorporate each of these into your event design can influence a person's decision to attend your event. How have you addressed these three pillars in your event design? It's not enough to switch to bamboo cutlery and

catering items, you need to look at how you're influencing sustainability in all its forms. Additionally, you need to consider how you're reporting this back to your conference attendees. Closing the loop allows an attendee to know how they've made a positive impact simply by choosing to attend your event.

If you'd like to review and innovate your event design, reach out. With more than 25 years in business events within the association and not-for-profit sector, I'm perfectly positioned to help you reignite your conferences and create an impact that will make a difference.

If you're with a venue or a destination, please also reach out as I run workshops to help venues also adapt their services to maximise your conversation of proposals to bookings.

Paula is a passionate advocate for the power of business events to create long term economic and sustainable impact. As a leader within the business event and association/not-for-profit sectors, with more than 28 years' experience, Paula works with associations to successfully design, develop and implement strategies for business events, strategic and international alliances, that enhance the member experience, adapt to changing environments, generate revenue and increase the value of the organisation.

Seven actionable steps to reimagine association events

Lee Gimpel ■

Close your eyes and think about a great event you've attended. What made it memorable? When we ask people this question, the answers inevitably speak to the experience of being there and feeling connected. On the other hand, participants rarely rave about how smoothly it ran or get nostalgic over the PowerPoint presentations they sat through.

Yet, so often, association gatherings such as annual conferences are planned with a vastly disproportionate focus on logistics and presentations while largely leaving the experience, the connections, and the sense of community as an afterthought. Flipping the script and putting engagement at the center of planning an event makes it more valuable for attendees (and sponsors and exhibitors), while also being more dynamic, more fun, harnessing more brainpower, and fostering a loyal, long-term community.

Here are seven actionable ways to increase the valuable engagement side of your next event:

Improve Your Name Tags

Maybe the easiest step to take with the biggest bang for the buck is to go from the usual Name-Title-Organization badges to ones that actually spark valuable conversations. Deprioritize titles, organizations, and even hometowns in favor of fields like "Talk to me about" or "I need help with." This small change can transform how comfortable people are connecting and it leads to more valuable, focused, and enjoyable conversations. Plenty of events already do something like this, notably including the TED Conference.

Meet Your Neighbor

In a way, asking people seated next to each other to engage in a quick conversation is one of the oldest tricks in the book – but it's one that is very effective, easy to do, and produces real results. Tell attendees to talk to someone they don't yet know and tell them to share for 1-2 minutes each, then listen to their partners. Try groups of 2-4 people. Ask a question such as, "What are you hoping to get out of this event?" Yes, people may groan when you first ask them to do this, but the energy that results is a palpable difference and those little beneficial touchpoints keep compounding for the rest of the event.

Set the Rules for Presentations

Lots of conferences put up guardrails for their presenters and there's no reason you can't do the same; after all, it's your event so you set the rules of engagement. When soliciting for speakers, you have the power to say that your chosen presenters can't use PowerPoint, or can't lecture for more than half the time, or that there must be a gamified element. One of the top killers of engagement at events is a format that is basically Death by PowerPoint – but it's easily preventable if you dictate what is and isn't right for your conference.

Prioritize Questions

Conference sessions usually leave questions for the very last minutes – and then many sessions run out of time and only squeeze in one or two questions if they're lucky. Instead, make the dialogue with the audience more central to your event by, for example, ensuring question-time is an inviolable 50 per cent of each session, or do 10 minutes of presentation and 10 minutes of questions and so on.

Do Structured Networking

Many vents spend lots of time on so-called content sessions and then leave networking almost entirely up to serendipity. To be clear, putting out coffee (or a cheese plate or even having an open bar) doesn't inherently get attendees to connect and certainly isn't a magic bullet that brings the right people together. Be it a mid-day break or an evening reception, think about ways to nudge people together. Maybe it's that certain areas of the room are reserved for certain discussion topics; maybe it's a scavenger hunt; or maybe it's that you have designated hosts (like your board members) who help introduce people to each other.

Have People Collaborate on Something – Anything!

A typical conference session may feature one distinguished graybeard – or a panel of four experts – who then outlines the biggest challenges confronting your field as 100 people sit and simply watch. Compare this with a session where those 100 people work in small teams to identify the biggest challenges – as well as solutions and best practices. Even if you only replace one speaker or panel with a collaborative session, it'll go a long way towards engaging and connecting attendees.

Try New Formats

If you ever feel like "been to one conference, been to every conference," you're largely right because they almost all use similar structures and formats that are often single speakers or panels. But there are tons of other formats to use. Take Open Space Technology, for example. It's a very effective, grassroots way to let participants define and drive their own conference that starts with a blank slate rather than taking on the burden of choosing speakers and preparing topics months in advance. It's more engaging, caters to the current needs in the group, and the improv approach can outperform months of tedious planning for a typical event.

Of course, it can seem daunting to stray from what your conference has looked like for decades. But even adding a sprinkle of these approaches can transform your events into dynamic, engaging, and memorable experiences. And the more that people feel engaged, the more likely they are to see value in not just the event itself, but the community around it, and the association that brings them all together.

Lee is the founder of Better Meetings in Washington, DC. The firm helps association make their conferences, networking events, and retreats more engaging and effective. Clients include the National Association of Realtors, Department of Energy, and the Manufacturers Alliance. He writes for Forbes as the publication's expert on meetings.

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Five strategies for transformative networking in the association landscape

Angela Shelton ■

In today's interconnected and rapidly evolving world, the key to growth and success increasingly lies in collaboration and networking. Far from a fleeting trend, collaboration has emerged as an essential strategy, transforming organisations within the association space. Through purposeful engagement with industry partners and fellow associations, the benefits of collaboration are evident and wide-reaching. This approach is not merely theoretical but can be implemented through five key strategies that have proven effective in fostering collaboration.

1. Understanding the Value of Networking

Networking within associations isn't just a transaction; it's an investment in mutual growth. By focusing on cultivating genuine relationships and understanding the unique value each party brings, you set the stage for more meaningful and impactful collaborations. Don't just network — network with intent.

2. The Impact and Art of Networking with Intent

This approach serves a dual purpose: it propels associations forward and offers avenues for individual career advancement, leadership development, and personal growth. Far more than a simple exchange of business cards, this strategy centres on partnering with trusted industry figures to formulate effective networking strategies. Such purposeful collaboration unlocks innovative solutions and fresh opportunities, effectively tackling challenges and opening new pathways for success.

3. Building Authentic Connections within Associations

Building authentic connections within associations is about more than mere interactions, it's about creating enduring relationships that are underpinned by trust, alignment, and continuous engagement. Trust and transparency are central to this process, serving as the foundation for confidence and collaboration. Openness and honesty in all dealings lead to long-lasting connections. Alignment of goals and values is also vital, allowing all parties to work harmoniously towards shared success, fostering a united effort that focuses energies in the right direction. Additionally, networking is not a fleeting event but a continuous relationship that thrives on regular communication and interaction. This continuous engagement, through regular check-ins and feedback, enables relationships to adapt and evolve, keeping the collaboration relevant, vibrant, and mutually beneficial. Together, these elements form the lifeblood of a thriving association, driving innovation, growth, and success.

4. Collaborating with Trusted Industry Partners and Fellow Associations

Collaborating with trusted industry partners is a cornerstone of effective networking within associations. The process involves more than just forming alliances, it's about creating synergistic relationships that drive mutual growth and innovation. Here's how to go about it:

- Identify Suitable Partners: Select those with aligned values and complementary strengths.

- Create Collaborative Agreements: Establish clear expectations and responsibilities.

- Monitor and Evaluate Success: Continuously assess the collaboration's effectiveness for both parties.

By following these steps, associations can build meaningful collaborations that drive innovation and success.

5. Tailoring Your Networking Approach

As you contemplate the realm of purposeful networking, consider these questions:

- Are your networking efforts aligned with clear and purposeful goals?

- How is trust being built within your collaborations?

- Are your networking activities designed for mutual benefit?

- How has networking with intent contributed to organisational or industry growth?

- What new strategies might enhance your collaborative efforts?

Networking with intent is more than a buzzword; it's a nuanced, ongoing strategy requiring careful planning, collaboration, and a willingness to invest in meaningful connections. By reflecting on key questions and understanding the unique value each party brings, you can innovate and adapt your approach to foster authentic relationships. As you navigate the complex landscape of the association industry, remember that impactful collaborations are built on mutual respect and a shared vision. Take a moment to fine-tune your current strategies; the future of your association — and the industry at large — may hinge on the actions you take today.

A dynamic leader, she skilfully unites people and resources to fortify Association Professionals, fostering a thriving community. Through inventive events, enriching learning opportunities, and her role as co-host of the Association Hub podcast, she offers invaluable insights and encourages stimulating discussions. With the support of Answers for Associations, this vibrant online peer networking community, she continues to inspire collaboration and empowerment.

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Legacy conferencing: The nexus of destinations and associations – the future of socioeconomic change

Matty Rubenstein ■

A Tale of Two Industries

Two deeply interwoven industries, destinations and associations have both seen unprecedented change to their business imperatives in the last decade. Yesterday's cities would compete for conferences as tourist destinations, a boon for hotels, convention centers and entertainment. Today municipalities see mass-tourism as the key to health, social and economic development. Associations at the same time have seen their core membership, education and publishing businesses continually eroded by new technology and online platforms. In their search for renewed vitality and relevance, the association industry has yet to realize, that those destination keys are in fact in its pocket.

Associations

Let talk about Associations for a minute. When you think about associations, it brings to mind people, shared experience, and a shared industry or academic background. At the heart of associations is sharing, sharing of ideas, sharing of goals, sharing of vision. Volunteers happily give more of their time managing their associations, planning and running events, and educating one another, than any company could possibly afford to fund. Funded by a mix of membership dues, industry sponsorships and conferencing, associations are a multi-billion dollar industry. However, that funding is under threat, and entrenched association operational models leave an industry that is not well positioned to find and take advantage of new opportunities.

But we haven't talked about the single biggest asset that associations have, because it is so intangible that even associations have trouble capturing it – that asset is passion. Members gravitate to associations for many reasons, often as mundane and practical as cut-price insurance and industry credentials. However, the heart of associations beat with the desire of members to have an impact on the world. It may only be focused on the world around their shared interest, industry, or academic discipline, but it beats loud and demands a stage on which to perform. This is the higher cause, the mission, that sets associations apart from any other company or organization. Social media has provided some level of outlet to our collective passions, but stops short at delivering real results. This is the higher calling to which associations are now being summoned.

Destinations

Growing up in Europe, I had the privilege to travel to most capital cities and experience the history, culture, and gastronomy they had to offer. Who would ever think that those same cities are now the breeding ground of anti-tourist organizations. Surely having the world eat your ice-cream and visit your sites is the desire of any human being – or perhaps not. Municipalities have also started to realize mass-tourism, think groups of thousands, does not bring enough value to a city. They've realized that these visitors may be better positioned to be catalysts of health, social and economic development, rather than consumers of beer and ice-cream. Destinations now understand that opening access to local government, health systems, research and education establishments, and industries, may encourage focused groups like academics, medical professionals, and industry leaders, to bring their specialties, influence, and knowledge as change agents to their cities.

Convention bureaus are moving away from a focus on fun, and towards being an interface between visiting conventions, and local government, social, health and industry stakeholders. As James Latham of the-iceberg.org (an organization that champions such seismic shifts in the destinations industry) describes it…'moving from being travel agents to change agents.' What is driving this transformation? What do these forward-thinking cities want from visiting conferences? Why are they investing in such resources? The answer is one word – legacy.

Legacy

A movement is emerging that believes that it is not enough, not acceptable, just not OK to bring thousands of delegates to a destination without leaving behind a 3 to 5 year legacy for the local community. This legacy could take the shape of a social, healthcare, or economic program, one that's germane to the group visiting the region. A city that has become the home for a particular technology or industry may use a conference to raise its international profile, highlight employment opportunities and bring investment. Perhaps a local community may struggle with a medical condition, and a medical convention may bring educational programs, medical specialists and interventionists that can provide a boost to local health systems and professionals. The opportunities are as endless as the need for such legacy conferences world-wide.

Legacy meet Associations, Associations meet Legacy

For an industry like associations, this is a tailor made opportunity. Associations are packed with passionate specialists that understand their own worlds, understand the challenges and opportunities, and are literally begging for opportunities to plug into the destinations with which they resonate. They're ready to collaborate in the creation of legacy outcomes. Associations are conference specialists; they're doing them all the time – there's nothing new there. The change that is needed in the association world is a paradigm shift from member-centric to mission-centric, from an internal to external focus. We need to see associations raising themselves up the value chain, taking their place at the table with industry and government, rather than appealing to their philanthropy and lobbying for change. ED's and presidents should see the creation of their own legacy portfolios as a badge of honor and achievement on their tenures.

A Taste of Success

Let's take a look at what a successful legacy conference leaves behind. Starting with a fairy-tale ending...about 5 years ago, the annual congress of ESTRO (the European Society for Radiotherapy and Oncology) chose Madrid as its destination because it recognized that the city had a challenge with cancer. ESTRO's legacy was a 700M euro investment which will result in the diagnosis and treatment of hundreds of thousands of patients over the 25 year shelf life of the equipment secured and the training of HCP's to operate it.

Let's be clear, this is unusual and may never be repeated, however similar events by EASL (the European Association for the Study of the Liver) has run more than one conference, leaving an impact of education programs for parents – resulting in reduced junk food consumption by kids in the host cities, along with a mobile blood testing lab that toured the region giving service to communities that may have shied away from public health systems, leaving them at high risk of liver damage.

ESO (the European Stroke Organization) who aim to reduce burden of stroke by changing the way that stroke is viewed and treated. As part of their annual congress organized by Kennes Group, they arranged a public education symposium, congress attendees spoke in local schools, students visited the congress, and to highlight the benefits of exercise the congress sponsored the annual Göteborgsvarvet half marathon.

There are amazing resources and video case studies about legacy conferencing on the-iceberg.org website.

The State of the Union

So, it is clear that associations and conference organizers can deliver legacy events, however, I think it's fair to say that destinations and associations have not yet reached matrimonial harmony. Although a large number of major cities have transformed themselves and stand ready to work with associations, most have not. While a few associations have managed to produce successful legacy conferences, a majority are nowhere close. The destinations industry has seen the success and value of these poster-child conferences, and has started to try and sell the concept to, and can't understand why, associations are not rising to the challenge. They don't understand how an association industry that claims to be mission-centric, will not take the opportunity to make real impact that's aligned with their goals. I've heard it posited that they think that the associations are either unable or unwilling to join the party. I don't think that is true.

Legacy conferencing: The nexus of destinations and associations – the future of socioeconomic change

▷ What is clear to me is that trying to sell legacy to associations through the usual conference channels is not going to work. These stakeholders do not understand legacy, are not measured on legacy and are not in the position to move the organization towards legacy. Someone needs to coach boards and staff through the legacy negotiation process, a process that will affect the whole organization. In parallel, conference specialists can do what they do well, plan a conference. This coaching may need to come from the destination themselves, consultants, or conference organizers. The adoption will be slow and painful, like all change in the association space. Destinations need to understand that the period of transition will be long, but the results ground-breaking.

To put it bluntly, destinations really don't have a choice, the association industry is holding their keys, and the destinations industry can't borrow the car from anyone else.

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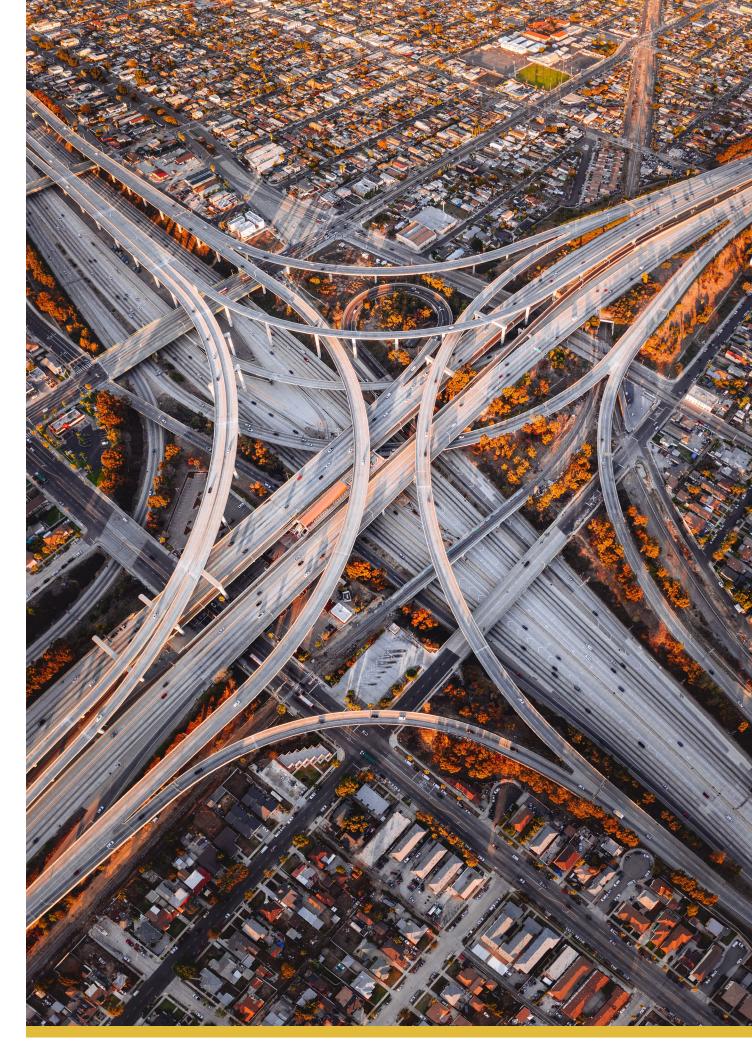
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Australia's Northern Territory – immersive cultural experiences

Karla Clancy ■

Australia's Northern Territory has established a world-renowned reputation as a place that delivers business events which are 'different in every sense', successfully combining destination appeal, quality infrastructure and the opportunity for genuine cultural engagement.

There is also scope for a business event to leave a meaningful legacy that enhances and enriches the delegate experience as well as the host destination, with benefits realised well beyond the event itself.

Darwin shows how business events can make a cultural connection.

A recent familiarisation program hosted by Northern Territory Business Events in Darwin showcased how cultural experiences can be effortlessly woven into a business events program. A group of visiting business events planners were invited to connect, in a range of different ways, with the Larrakia People, traditional owners of the Darwin region. Each experience provided different insights. The first occurred when Dr Richard Fejo, a highly-respected Larrakia Elder, conducted a moving Saltwater Ceremony, inviting delegates to enter the Darwin Waterfront lagoon at ankle-depth and make a truly meaningful connection with the Larrakia, who are known as 'saltwater people'.

A 'Welcome to Country' ceremony at Mindil Beach Casino Resort was delivered by three generations of the Lee family from Saltwater Cultural Tours. Guests at this event were invited to walk through the smoke of a small fire created as part of the smoking ceremony – this ritual establishes a connection to country and also promotes the well-being and protection of visitors to the land.

On the lawns of Hilton Garden Inn Darwin, singers from The Youth Mill provided a mesmerising cultural performance during an al fresco breakfast. The Youth Mill is a program development and facilitation service which provides young people with a range of up-skilling activities, from creative arts and recreation to development of practical skills and employment pathways. The Youth Mill's 'Cultural Music and Performance Production' program focusses on contemporised traditional music, song and dance to deliver the Larrakia cultural message and is often noted as a highlight when featured in a business event in Darwin.

Peta Webster, Director of Event Operations with GEMS Event Management Australia spoke enthusiastically of her experience in Darwin.

"The incredible way Indigenous culture has shaped the destination, and how it has been embraced and interwoven in all experiences for business events attendees, gives an experience unlike anywhere else in Australia. I can't wait for our delegates to immerse themselves in everything that is Darwin".

Remote Laundries initiative delivers genuine legacy.

On a recent visit to Remote Laundries in Darwin's outer suburbs, business events planners learned about this free laundry facility and the valuable role it plays in NT communities. One of four services which are now in operation, the laundry forms part of the core role of the Aboriginal Investment Group (AIG), an Aboriginal-owned corporation which seeks to build strong and healthy communities.

The AIG CEO Liz Morgan-Brett, a highly-accomplished former Olympian athlete and passionate speaker, showed how she is keen to talk to business events groups about the way in which facilities like Remote Laundries are making a significant and real difference to the quality of life, health, social and economic outcomes for Aboriginal people.

Subsequent follow-up discussions between AIG and event planners, as well as the ongoing relationship with NT Business Events, highlight the potential power and value of well-considered and meaningful legacy activity.

A festival showcasing Central Australia landscape and culture.

Parrtjima – A Festival in Light held annually in Alice Springs offers a spectacular way in which to enhance a business event, taking attendees on a visually-stunning cultural journey. It is the only authentic Aboriginal light festival of its kind in the world and showcases Australia's ancient aboriginal culture, displayed on a 2.5-kilometre stretch of the majestic 300-million-year-old MacDonnell Ranges.

The majority of the 10-night program takes place at the Alice Springs Desert Park, just seven kilometres from the centre of Alice Springs and incorporates a range of interactive light installations and nightly projections. There are also musical performances, workshops and talks, with innovative technologies combining with traditional story-telling methods to offer a unique cultural perspective.

Balms deliver more than health benefits.

The Purple House is a non-government, not-for-profit social enterprise based in Alice Springs which aims to improve the lives of people suffering with renal failure, whilst also reuniting families and reducing the impact of kidney disease in Aboriginal communities.

In addition to offering life-saving kidney dialysis treatments, it also supports Aboriginal communities through the making and selling of bush medicines, balms and soaps which are based upon Central Australian bush medicines.
Business event groups can visit The Purple House and actively engage in bush balm-making workshops, enabling the passing on of skills and a genuine Cultural Knowledge Exchange experience.

Australian Professional Conference Organiser, ICMS Australasia (ICMSA) is an organisation whose delegates participated in a bush balms workshop. Emma Bowyer, Managing Director with ICMSA spoke about their event in Alice Springs.

"The experiences and opportunities we've now all shared together will stay with us forever," she said. "A truly unique and quintessential Australian destination, aligning perfectly with our own corporate value compass."

NT's desert sky showcases an ancient culture.

The new cultural experience being offered at Uluru by Voyages Indigenous Tourism Australia provides immersion in the storytelling of the Anangu people, the Aboriginal traditional owners.

Wintjiri Wiru, which means 'beautiful view out to the horizon' in the local Pitjantjatjara language, is a spectacular light, laser, projection and drone experience which brings to life an ancient story from the world's oldest continuous living culture. Utilising ground-breaking technology, it delivers a breathtaking combination of choreographed lasers, sound and lighting with more than 1,000 luminous drones taking flight each night to lift ancient images to the sky.

The show provides insights into the Mala ancestral story which has been passed on for thousands of generations. There are a number of options available for business events groups visiting Uluru to engage in a respectful way with this ancient cultural experience.

For further information on cultural experiences for business events in the NT, visit www.ntbusinessevents.com.au

Karla Clancy is the Partnerships and Client Engagement Manager with Northern Territory Business Events, the official convention bureau for the Northern Territory. Karla is responsible for developing and implementing strategic partnership activities that position the Northern Territory as a competitive, distinctive and meaningful destination for business events.

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How e-learning can help drive business success: Creating learning content that drives business outcomes

Tony Maguire ■

For businesses in any sector, one of the keys to staying competitive is for their leaders and employees to embrace and engage in continuous learning and development. Businesses that prioritise this tend to have a more skilled and engaged workforce, which can help drive business growth and success.

Unfortunately, a lot of companies struggle to nurture and sustain a culture of continuous learning and development in their workplaces and there are several reasons for this that can be resolved. Businesses that have chosen to embrace eLearning as a strategic tool for employee training and development are finding themselves better positioned to retain talented team members and leverage competitive advantage.

The adoption of eLearning solutions has accelerated over the past decade, driven by technological advancements and the need for cost-effective, scalable training methods. Traditional face-to-face training has its place, but eLearning offers several distinct advantages that can be instrumental in achieving better business outcomes.

Scalability and Consistency

One of the primary benefits of eLearning is its scalability. Whether you have a small team or a global workforce, eLearning can deliver consistent training experiences to each employee irrespective of time, place or circumstance. This consistency ensures that every team member receives the same high-quality information and skills, levelling the playing field and reducing knowledge gaps.

Multinational businesses can use eLearning to train their salesforces consistently across every region exactly when it is needed. By creating a standardised eLearning program, businesses can ensure that every sales representative, regardless of location, receives identical product knowledge and sales techniques.

Companies that adopt this consistent approach typically see an increase in sales performance and customer satisfaction.

Cost-effective Learning

Traditional training methods often come with substantial costs for materials, trainers and travel. eLearning eliminates many of these expenses. Additionally, it allows employees to access training materials at their convenience, reducing the time and productivity lost due to travel and time away from work.

By leveraging eLearning platforms, businesses can significantly eliminate traditional barriers inherent in less flexible modes and increase productivity.

Aligning Training Content with Business Objectives

Every business has unique training needs and eLearning platforms offer the flexibility to tailor training content to meet specific organisational goals and individual employee requirements. Customisation utilising automation and AI can ensure that the training aligns with the individual skills and competency needs of each employee and accelerate business success.

Enhancing Employee Productivity

It is a fact that well-trained employees are more productive. eLearning allows businesses to provide ongoing training, enabling employees to acquire new skills, learn new technologies and stay up to date with industry regulations. This decreases risk, increases efficiency and ensures a workforce that can adapt to evolving business needs.

Improving Employee Retention

Employee turnover can be a significant drain on resources. High turnover rates not only lead to recruitment and training costs but also disrupt business

continuity and growth. eLearning can play a pivotal role in employee retention by offering valuable opportunities for career development and growth within the organisation.

Companies that face a high employee turnover due to limited career advancement opportunities and a high stress environment, such as distribution, retail, hospitality or call centres are focused on improving employee retention. They can introduce eLearning modules that will enable their employees to acquire new skills and move up the career ladder. This will in turn result in a reduction in employee turnover, saving organisations substantial recruitment and training expenses.

Improving Compliance and Risk Management

In industries with strict regulations and compliance requirements, eLearning can ensure that employees are well-versed in the necessary rules and procedures. This reduces the risk of legal issues and penalties, ultimately protecting the organisation's reputation and bottom line. By regularly updating and reinforcing compliance training relevant to their industry sector, businesses can minimise the risk of regulatory violations and potential fines.

Speeding up Time-to-Market

Ultimately getting products and services to market quickly is critical. eLearning can accelerate the training process, enabling employees to learn new skills or adapt to changes in processes rapidly. By utilising eLearning, businesses can train their employees much quicker enabling them to gain a competitive edge in the market.

Employee Data-driven Decision-making

eLearning platforms often come equipped with robust analytics tools that provide valuable insights into employee performance and training effectiveness. By harnessing these data-driven insights, businesses can make informed decisions about their training programs, optimising them for better business outcomes. Businesses can analyse their eLearning data to identify areas where their customer service teams need additional training. By addressing these specific gaps in knowledge and skills, they can reduce customer complaints, leading to higher customer retention and increased sales.

The Takeaway

eLearning is not just a convenient way to deliver training; it's a strategic tool that can drive competitive advantage and business success. Its scalability, cost-effectiveness and customisation options make it a strategic asset for organisations looking to enhance employee productivity, reduce staff turnover, ensure compliance, accelerate time-to-market and make data-driven decisions.

Businesses that embrace eLearning as an integral part of their training and development strategy are not only investing in their employees but also positioning themselves for sustainable growth by ensuring the business remains agile, competitive and poised for long-term prosperity.

Tony leads the D2L team and focuses on executive-level engagement across the ANZ region. He is a seasoned executive and industry leader whose experience ranges from Fortune 500 companies including Apple and Oracle to advising entrepreneurial Australian start-ups and leading regional market entries for global companies. He has created deep and lasting local and international networks over his 25 years in the EdTech space - always with a focus on collaboration and using learning to drive business transformation.

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The impact imperative in education

Jeff Cobb & Celisa Steele ■

What are the most important factors for your members when deciding whether to invest in a continuing education or professional development experience?

Over more than a decade of conducting surveys for our clients, we've found that – not surprisingly – people care about the reputation of the presenter and, where relevant, they care about whether continuing education credit is offered. Perhaps more surprisingly, a factor that has consistently ranked in the top two or three out of several possible choices is:

> **The activity has been shown to produce demonstrable improvement in knowledge or performance for those who take part.**

The desire for "demonstrable improvement" – in other words, impact – is growing significantly as the market for adult lifelong learning evolves, but relatively few organizations are prepared to demonstrate that their educational offerings actually move the dial for learners. For those that want to remain competitive in the new learning landscape, that needs to change.

Why Impact Matters More Than Ever

Spurred by advances in technology and changes in the global economy, the market for continuing education, professional development, and lifelong learning has become much larger, more sophisticated, and competitive over the first two decades of the 21st century. Three factors now drive why impact is becoming an imperative.

Lifelong learning has gone mainstream

As little as a decade ago it was rare to see the term "lifelong learning" in mainstream or business media. It has since become a major focus, along with related terms like "upskilling" and "reskilling," and widely respected publications like The Economist have gone so far as to declare it an "economic imperative."

Learners have more choices than ever before

Big commercial companies have gotten into the game – LinkedIn Learning is just one of many. The subject matter experts associations rely on for creating education can now easily bypass them by working with these companies and/or by licensing a low cost online platform. And, of course, aside from formal offerings, learners can and do make extensive use of search engines, YouTube, and a wide range of other platforms. Competition for their attention is arguably fiercer than competition for their wallets.

Impact is more measurable than ever

With advances in learning science, we know more than ever about what to measure and how to measure it. And we now have much better, more affordable tools to do it. Recent advances in AI make that even truer – the ability to dynamically analyze large amounts of data and provide much more personalized learning experiences will make it possible to deliver highly targeted, individualized impact.

All of these factors combine to make a measurable return on learning not only possible but expected – by learners and by the organizations that employ them. Bottom line: If your members – or their employers – are going to spend time and money on education, they expect it to actually produce results.

Traditional Evaluations Aren't Enough

Many education and events staff will counter that their organizations consistently collect evaluations at the end of seminars, conference sessions, and other learning events. But while these evaluations may have some value, they typically are designed only to measure the reaction of learners to the learning experience.

"Reaction" is Level I of the widely used Kirkpatrick model for evaluating adult training and education.

Unfortunately, a range of research has indicated that there is little connection between the way people initially react to training or education and how it ultimately affects their performance. Indeed, it is not uncommon to find situations in which instructors and sessions have received poor Level 1 evaluations and yet proved to have significant positive impact on learners' longer-term performance.

Because associations are in the learning business, it is useful and important to know whether your learners (aka you customers) like what you are offering – what typical evaluations measure. At the same time, as mission-driven organizations, we often need to give learners what they need, which is not always what they want.

How to Better Measure Impact

Measuring impact begins with creating well designed learning experiences that have opportunities for measurement built in.

Greater use of pre- and post-assessment is one clear path to better measuring the impact of learning. Assessments may be longer or shorter and more or less complex depending on the nature of the learning experience, but even brief, simple assessments can effectively capture "before" and "after" states.

The use of assessment and evaluation over time should also be increased. As already noted, the possibilities for gauging impact immediately following a learning experience are very limited. Following up weeks, months, or even years after the experience can give much more insight into how and whether the learning actually "stuck" and had an impact.

Integrating more opportunities for practice and application, both during and – crucially – after a learning experience ensures learning will stick and also gives learners a concrete point of reference – rather than just their "gut" – for assessing their own improvements.

Finally, it's important to note that the level of measurement suggested here may not be necessary for every learning experience an organization offers, but it should be a priority for at least a subset of learning experiences to incorporate well defined approaches for measuring impact.

Communicating Impact

Arguably, the main reason for focusing on impact is that it is simply the right thing to do. The promise of results is implicit in association educational offerings and organizations have an obligation to deliver on that promise. But another key reason is that being able to demonstrate and communicate impact – through data, through stories, through testimonials – creates a powerful marketing edge.

In today's highly competitive market for continuing education and professional development, if your organization is able to "demonstrable improvement in knowledge or performance," learners will beat path to your door.

Jeff Cobb and Celisa Steele are co-founders and managing directors of Tagoras, a firm focused on helping organizations in the business of continuing education and professional development increase their reach, revenue, and impact. They also co-host the long-running Leading Learning Podcast, a source of ongoing insights and information for learning business professionals.

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How associations can advance their mission while generating revenue

Francisco Gomez ■

Associations exist to serve a purpose and advance a mission, whether it's advocating for an industry, providing education, or bringing together a community. However, associations still need sufficient revenue to operate effectively. After all, "No money, no mission!" And, newly-formed for-profit associations have become new competition for some associations who, at one point in time, believed they were insulated from outside, competitive pressure.

A key is finding ways to generate funds that align with the association's values and purpose.

Expanding Globally

One approach is to expand an association's reach globally. There is often demand beyond an association's home country for the programs, products and services it provides. Forming chapters or partnerships in new countries allows an association to increase membership dues and reach new audiences for existing products and services, which helps diversify its sources of revenue. It also spreads the association's mission worldwide.

In our most recent biannual Factum Global Business Sentiment Survey, 78 per cent of respondents had a favorable outlook towards global business, up 11 per cent from the previous study. This implies that organizations are searching for meaningful growth outside of their home market.

When expanding globally, associations should ensure the culture and needs of new target markets are considered. Programs may need to be adapted, translated, or created for the local context (i.e., "localized"). Marketing should also be tailored and relationships built with influencers in each region. Done thoughtfully, global growth allows an association to stay true to its mission while significantly increasing its member base and revenue potential.

Diversifying Products and Services

Beyond membership dues, associations can generate revenue from non-dues products and services that also advance their mission. Examples include:

- Certification programs that appeal to aligned professionals.

- Original research reports and digital offerings valued by members.

- Virtual or in-person events, trainings, and conferences.

- Fee-based access to online platforms with tools, resources and solutions.

- Consultancy services to help implement best practices.

- Job boards and career centers related to the field.

By expanding their offerings, associations can meet more member needs while producing new revenue streams. However, products and services should stay true to the association's purpose and vision. Those that provide value to members and support the mission are win-wins for generating revenue.

Monetizing Data

Associations collect valuable data from members, often through surveys, certifications, and website interactions. With care taken to protect privacy, this data can generate revenue through carefully-selected sponsorships. Partners may pay for access to data insights, aggregated and anonymized member data, or member contact lists within specific demographics.

Associations can monetize data to off-set membership dues and support programs advancing their mission. Since data provides value to members as well, it should be a win-win for the association and corporate partners. Transparency, member choice, and privacy controls help ensure ethical use of data.

With a clear vision and commitment to their purpose, associations can utilize opportunities like global growth, new products and services, and data monetization to generate revenue. This allows them to not only survive, but thrive and advance their mission to reach a broader, more diverse audience well into the future. With care not to stray from member-focus or mission-alignment, generating revenue and making an impact can go hand-in-hand.

Francisco Gomez is the CEO of Factum Global, focusing on innovative globalization strategies for associations and businesses. Prior to this, he served as a director at the American Chemical Society and worked in consultancy and healthcare management. A frequent speaker and educator, Francisco holds an MBA and is fluent in multiple languages. He resides in Washington, D.C.

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Seven ways for associations to stand out when contacting corporate sponsors

Lori Zoss Kraska ◼

As the need for non-dues revenue continues to accelerate, many associations are looking to corporate sponsorship as an avenue to both grow revenue and create partnership opportunities with long term benefits for both association members and their brand. As associations engage corporations for sponsorship, competition from both traditional media and other purpose driven opportunities requires associations to make an impactful connection fast. That being said, below are seven ways associations can stand out when contacting corporate sponsors for non-dues revenue opportunities.

Do Your Research

Go beyond the website. Review annual reports, (CSR) corporate social responsibility goals, (ESG) environmental, social, governance reports, to decipher how your association aligns with their initiatives for community engagement, sponsorship, or philanthropy.

Set Up Google Alerts for Automatic Prospecting and Research

Are there companies you've had an interest in speaking with about corporate sponsorship for your association but just haven't gotten around to the research? Are there industries that you think make sense as a target area for your association's corporate sponsorship focus? Are there topics you'd like to learn more about that your sponsors care about? Interested in researching a decision maker you're meeting with for a big non dues revenue idea for your association? Google Alerts are perfect for all of the above and more. Just Google "Set Up Google Alerts" and Google will provide instructions to enter your areas of interest. Google will then automatically send you relevant articles and news around these specific topics, people, companies, etc.

Also, if you're interested in multiple Google Alert topics, it's a good idea to create another email address for the sole purpose of Google Alert emails as you'll receive a plethora of information. With Google Alerts there's no reason to feel stuck in getting started. Google has done the sourcing work, you just need to find what resonates with you and your organization within the content.

Embrace the Power of Brevity

Associations and other purpose driven organizations tend to say too much too soon in their corporate sponsorship outreach communication. Keep your first outreach quick but impactful. First emails should be no longer than 150 words and focus on the following: who are you, how does your association/program connect to the corporation's interests, and what do you want next (meeting, phone call, send info etc.) Brevity is essential as it shows that you respect their time.

Use LinkedIn

LinkedIn is key to learning about your decision makers as well a good means to contact them if they're active on LinkedIn. As various researchers suggest that the average corporate decision maker is getting on average 120+ emails per day, reaching out on LinkedIn is a great way to break through the clutter!

Practice Corporate Depth Perception

Corporate decision makers respond best to organizations that understand the process for sponsorship is a marathon and not sprint. Also, recognize that although finding sponsorship, funding, or partnership for your association is top priority for you, it's not the same top level priority for the company you're contacting.

Corporate decision makers juggle hundreds of tasks and initiatives. Recognizing this and showing empathy for the corporate decision maker   sets you apart!

Opt for Sincere Gratitude Instead of Thank You

Most people say thank you when they're engaging a corporate decision maker, however, few express sincere gratitude. Instead of "thank you" end your conversation or engagement with a statement of gratitude. Here's an example: "I realize the number of well deserving associations speaking with you about support and how time consuming that can be, so I truly appreciate this opportunity for you to learn more about our good work and how it might align with your goals."

Stay Away from FOMO

Your organization has its own journey: starting with the positive, FOMO (Fear of Missing Out) can be a good thing. You learn best practices from other associations, read inspiring sponsorship case studies, and keep up with the latest in what corporate sponsors and funders have an interest in supporting. However, FOMO turns counter productive when it makes you or your association feel inferior as opposed to inspired. At its worst, FOMO can paralyze you from doing anything because you don't want to do something that others might perceive as incorrect.

For example, you're at a conference and you meet Cindy, another corporate sponsorship professional of a similar sized association as yours. She mentions that she makes 25 new outbound calls/emails each day to potential sponsors and spends a minimum 5 hours a week on new prospect research. You on the other hand just took on the corporate sponsorship role for your association. As this is a new area of focus for your association, you agreed with your President to focus on a small number of prospects that you'd research and nurture. This strategy felt good until you met Cindy. Now you're not sure what to do. This is how FOMO can derail a good strategy.

The truth is associations, and their leaders are unique. What works for some may not work for others. Just because another professional or association does it doesn't mean you should. Spend time with your executive team to build a corporate support and outreach strategy that works for your association and best represents its mission and values. Most importantly, stick to your plan no matter what the neighbors are doing.

Lori Zoss Kraska, MBA, CFRE, Founder and CEO of Growth Owl, LLC, with 22+ years of expertise in corporate sponsorships. She excels in exceeding goals, connecting clients to Fortune 1000 companies. Lori is an author, speaker, and offers corporate sponsorship training via Growth Owl Academy, empowering associations and nonprofits to achieve sponsorship goals.

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A half-dozen ways to improve your association's corporate partnership program and advance your association

Bruce Rosenthal ▪

There are three basic rules for corporate partnership program success:

Rule #1. Align with your association's mission.

Rule #2. Fulfill the needs of your associations' members.

Rule #3. Don't forget Rules #1 and #2.

Here are six ways to have a successful corporate partnership program while aligning with your mission and fulfilling members' needs. The goal is to create a win-win-win...for the association, association members, and corporate partners.

How to Solve the Dilemma about Providing Members' E-mail Addresses to Partners

Should you include email addresses when offering member or attendee lists to corporate partners?

Reality check: When associations don't offer member or attendee lists with contact information, companies might drop or reduce their sponsorship and spend their marketing dollars with organizations that offer paid supplements and pay-for-play webinars because these organizations provide contact lists….with email addresses. Or, companies can create their own lists via social media and lead generation forms.

Find the win-win: Have a conversation with your top-tier corporate partners about who they want to reach to fulfill their marketing goals. Maybe the company wants to reach a segment of your membership; if so, your association could send the company's educational white paper to these members and provide the company's contact information. Some companies would prefer to get 30 qualified leads this way than receive a membership or conference list with 3,000 listings.

How to Work with Corporate Partners to Meet the Needs of Young Members

Companies often tell me they are interested in reaching students and those recently hired in trades and professions. Companies recognize these folks as future customers, clients and/or future employees.

When I present this information to associations, I often hear, "We don't have a student or young professionals membership category" or "We have a membership category for students and young professionals, however, we don't provide many benefits."

Many corporate partners are ready, willing, and able to provide content to young professionals: leadership training; mentoring; how to advance in the trade and profession; DEI advice; entrepreneurship guidance; etc.

Aligning young professionals with corporate partners is a way for associations to add association relevance for younger members. This is also a way for associations to add value for corporate partners at the association's conference and throughout the year.

How to Create Value-add Recognition for Corporate Partners

Associations often focus on providing recognition for sponsors. However, recognition, logo placements, banner ads, signage, etc. are often at the bottom rung of corporate value for companies.

At educational conferences, sponsors are interested in being positioned as thought leaders.

Ideas for adding value for sponsors in conference promotions:

- If any of your sponsors are on the faculty for conference sessions, you could say: "Thanks to our company, Company A, for providing examples of successful member programs for the session 'Innovative Leadership Strategies'."

- If any of your sponsors has an educational (not sales-focused) white paper on a relevant topic, you could say: "Thanks to our company, Company B; they will have a special white paper, 'Combating Supply Chain Challenges' available at their booth in the expo."

- If any of your sponsors has expertise on a federal or state regulation impacting members, you could say: "Thanks to Company C for staffing the Regulatory Solutions Kiosk and answering members' questions."

How to Help Partners Pivot from "Sales" to "Education"

One of the biggest concerns associations have about corporate partners is that if they're given a platform – conference session, webinar, white paper, etc. – they'll sell their products and services.

Here are two guidelines that associations should explain to conference and year-long corporate partners:

1. **Educate to sell, don't sell to educate.** Clarify that their company will be more likely to fulfill their sponsorship goals – even if those goals include "getting more customers" – by educating, not selling.

2. **A TED Talk Commandment is:** "Thou shalt not sell from the stage: Neither thy company, thy goods, thy writings, nor thy desperate need for funding; least thou be cast aside into outer darkness."

These guidelines will minimize or eliminate overly-commercial content from corporate partners. (If a company wants to promote sales, they should buy a bigger exhibit booth or more advertisements.)

How the "Big Tent Theory of Partnerships" can Result in a Better Program

Some associations say they can't (or won't) link to corporate partners' content; post sponsors' content; allow sponsors to participate in education sessions and podcasts; provide sponsors with lists of webinar attendees; provide sponsors with access to association listservs, etc.

Companies are finding many ways to reach and teach association members on their own …. via social media, advertorials in trade media, for-profit expos, educational content on the company's own website, creating their own on-line communities, etc.

Here is the "Big Tent Theory of Partnerships":

- Associations should create a bigger tent for members and corporate partners to maximize collaboration and information-sharing.

- Or companies will expand their tents and create attractive opportunities for members.

P.S. Companies would prefer to be in the associations' tent and partner with associations for the power of affinity.

How to Deal with Corporate Partners that "Go Rogue" at the Association's Conference

Instead of sponsoring or exhibiting at association conferences and expos, some companies are registering as attendees, networking with clients and prospects, and hosting receptions and dinners.

A half-dozen ways to improve your association's corporate partnership program and advance your association

▷ While associations can't stop companies from meeting with members and having their own events during the association's conference, associations **can incentivize companies to be more collaborative.**

For example, consider offering top-tier, year-long corporate partners:

- A room for their reception in the headquarters hotel (that the association reserves as part of its contract with the hotel).

- Coordination of the timing of the company's reception so members don't need to choose between a conference session and a company's reception.

- Serve as the liaison between the company and the hotel's food-and-beverage staff (though the company pays for food and beverage).

- List the company's reception in the conference program and app.

- Provide signage to identify the corporate partner's reception room.

- Arrange for an association Board member or other VIP to attend the reception.

- Provide a small meeting room in the convention center or conference hotel for company team meetings and/or small sales meetings with attendees.

Talk with some of your top-tier corporate sponsors and partners about these opportunities.

Bruce Rosenthal is a strategic advisor, consultant, and educator to associations. He creates sponsorship and partnership programs that increase revenue, add membership value, and foster sustainability for associations. He demonstrates leadership in identifying and cultivating sponsorship and partnership best practices, opportunities, and solutions as Convener of the Partnership Professionals Network (PPN), a national sponsorship/partnership organization.

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How can associations boost their revenue?

Adjunct Associate Professor Deanna Varga MA BA GAICD ■

Association executives know that the stability, viability and sources of revenue for their organisations are under the microscope at board tables across the globe. Diversifying sustainable revenue streams is critical for Associations seeking financial stability and sustained growth, and the ability to see through challenges, manage the talent crunch, flux in the marketplace, an increasing competitive landscape and digital transformation. But how do you do it?

Working across numerous associations and sectors, I've gathered the top eight strategies we can use to boost and diversify revenue.

What are the Most Effective Revenue Streams and Profit Drivers?

Unfortunately, there is not a one size fits all approach, but tried and tested processes for choosing the most effective revenue streams and activating profit drivers. This starts with a clear, well-thought-through strategic plan. Associations need a strategic plan that focuses on how it will deliver on its mission, but equally important is a plan that understands the role of revenue or profit streams to meet that mission. The two are intertwined.

In essence, the secret sauce is having a strong value proposition (for members or stakeholders) and an understanding of where the revenue or profit drivers are that fulfill that mission. There are many ways to develop revenue, some can be complex and others quick wins – a mixture of the two is best.

Eight Strategies for Boosting and Diversifying Revenue

1. **Conduct an Internal Review:** For many organisations there is a lot of opportunity already in the existing strategies and revenue streams. Are you optimising your current profit activities to their maximum? Engage your staff or seek external assistance to understand what changes could be made to existing streams to ensure you aren't leaving income on the table.

2. **Be Mission Focused:** It is key to ensure your revenue streams 'make sense' for your organisational focus, for the longevity of its programs and your organisation's ongoing brand reputation. For example, the Royal Society for the Prevention of Cruelty to Animals (RSPCA) licences are helpful to consumers to identify products that have considered the welfare of animals and meet a standard set by the RSPCA.

3. **Offer Insurance:** Insurance is becoming increasingly valuable for members for three reasons:

   - A tailored insurance program for their sector provides comfort that members are understood, and risk minimised when needed most.

   - Members usually receive a discount by going through the Association's designated insurance provider or broker. Thereby, insurance is an easy to sell addition to the value proposition of membership.

   - The commercial arrangement between the Association and the insurer means there is an ongoing return. Depending on the number of members that take up the insurance offer, Associations can generate significant revenues.

4. **Collaboration:** Working with like-minded colleagues can reap huge gains. Good collaborators aren't always obvious, but they need to be mutually beneficial and work to propel the mission of both organisations. Records and Information Management

How can associations boost their revenue?

Practitioners Alliance (RIMPA) collaborated with global sister Associations for additional global membership benefits as well as diversifying to new member audiences and sectors. The Australian Red Cross collaborates with the Australian Psychiatrists Association giving staff on the front line the option to speak to a trained psychiatrist. (This was not a financial partnership, but the Red Cross were getting professional help for their staff, so they could keep doing what they needed to do.)

5. **Self-regulation:** If the regulations for your sector change, and there's still an industry need for some level of regulation or self-regulation, this could be an opportunity for your association. You could develop the regulation, or an education product, to help members understand what it is and how to comply. This can be a valuable opportunity to develop an ongoing revenue stream.

Does your Association need new thinking on revenue generation?

Featuring five association case studies, this new white paper from commercialisation expert Deanna Varga, reveals strategies associations are using globally to develop long-term successful revenue streams.

Scan QR code to read now

MayvinGlobal

www.mayvinglobal.com

Diversifying Revenue
AN ASSOCIATION'S GUIDE TO KICK START COMMERCIAL THINKING

White Paper by Adjunct Associate Professor Deanna Varga
OCTOBER 2023

MayvinGlobal

6. **Partnerships (and Sponsorships):** A key revenue stream for many associations, for many years. Two-way partnerships, that are multi-year, multi-faceted and dual problem-solving are the most beneficial as they give the most value and return to both parties.

7. **Educational Opportunities:** Education has benefited from significantly improved technology and changes to how we consume content. Many more associations are now looking at on-demand solutions or online education as a viable revenue stream. Many trialed it during the pandemic and learnt that the robustness of the technology is important and are now adapting it to a more professional level. For example, micro credentials have gained prominence offering focused, flexible certifications for specific skills or competencies in recent years. These bite-sized credentials are tailored to evolving industry demands, allowing members to efficiently upskill or reskill.

8. **White Labelling:** This is a strategy that provides many avenues for income, be it job boards, affiliate marketing, insurance, and third-party services. These options support revenue diversification and in some cases risk mitigation. However, they do need a deep understanding of Service Level Agreement management and contract negotiation to ensure brand alignment before revenue.

Other strategies that associations are using include leaseholds, investments (property or finance), merchandising, publications/journals/thought leadership articles, research, consulting, social media platforms and offer advertising. The options are endless; however, you need to find the right fit for your Association, investment horizon and timeframes.

Ask yourself, what will your revenue streams look like in five years? Will these revenue streams continue as levers to support your mission – directly or indirectly? How will you support these streams, and do they align with your long-term horizon?

Founder and CEO of Mayvin Global, Deanna Varga is a specialist in revenue generation, diversification and commercial thinking for associations and the business events sector. he is a seasoned Non-Executive Board Director, holding numerous positions. Deanna founded Mayvin Global in 2017 and has offices in Sydney, Gold Coast and Darwin.

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Have you asked your members to leave a gift in their will?

Tanya Busoli ■

Charities, educational institutions, hospital foundations and other organizations have been tapping into the power of bequests for years to provide them with a strong source of support to make impactful changes into the future.

However, very few associations and other non-profits consider the power of bequests to impact the future of their cause.

I'd like to offer some food for thought.

1. Passion for your Cause

There are two crucial deciding factors in whether someone may leave a gift in their will to your organisation: they trust you, and they believe what you are doing is important. Doesn't that sound like your members?

Your members are highly engaged: they pay your fees, give their time, share their knowledge. Your organisation helps them in their working lives and they in turn give back. This is especially the case for anyone who is volunteering within your governance structure or at your events, as a mentee or mentor, or sharing their experiences through articles, podcasts, and more. Depending on the age of your organisation you may have founding members still engaged or accessible.

2. Shared Vision of the Future

People give bequests if they trust an organization, they believe in their vision, and if it's something that they believe is important to them during their lifetime.

People leave gifts in their will to organisations such as their school, university, or a charity that has impacted them in some way. Most common reasons include that they are grateful for their personal experience, and they are wanting to make an impact on the future.

Your members may be engaged with your organisation for much longer and more deeply than they are involved with some of these other organisations that more commonly receive gifts in wills.

Perhaps the biggest difference in their likelihood to give to your organisation is that you have never asked.

3. Moving from 'Feels Icky' to 'Life Admin'

The biggest barrier to implementing a bequests program is the idea that bequest giving is about death, and we are culturally inclined to be uncomfortable talking about death. My response to this – the short version – is that only living people can write a will. And in fact, this is something that every adult should do regardless of their age and health, as part of their normal 'life admin'.

There are reports that up to 70 per cent of Australians and more than 60 per cent of adults in the United Kingdom don't have a will. In Australia, there is legislation that governs what happens to your estate if you do not have a will and this may well be the case in many countries. However, this increases the financial costs against the estate, not to mention the emotional and administrative burden left on loved ones during a time of grieving. This is a 'life admin' task that you can help your members tick off. Charities offer free will writing days and even free online will writing programs that your organisation could consider.

4. No Time Like the Present

If you don't already have a bequests program in your organisation there is really no time to waste. It is well documented that we are in the beginning of the greatest intergenerational transfer of wealth that the world has ever seen. The children and grandchildren of the silent generation and the baby boomers are often quite well-established financially, making these generations even more likely to include a legacy for the future through their will.

5. You Need a Process

When you do start a gift in wills program you will need a process and assigned responsibilities. When you start learning of members leaving gifts in their will it is crucial to make sure this is identified in your member database and that you take special care of these people even when they retire or step back from active involvement.

6. You're Nearly Ready to Get Started

You are already engaging with your members; you have established communication channels and regular surveys. It is not an onerous task to weave messaging about bequests into existing channels.
Also, unless your membership base is especially large you should be able to allocate responsibilities within existing roles until you reach a tipping point where you need to allocate staff specifically to work in this space.

7. Identifying Prospects

You don't have to leave a large gift to make a difference. You don't have to be wealthy to leave a gift in your will – in fact you may have limited cash but significant assets.

8. Some Examples

There are some examples of people leaving gifts in their will to member-based non-profits. The Australian Workers Union has a lovely story on their website about a member who left a gift in his will that supported the AWU to set up a group for hair stylists.

Examples from member-based groups are few and far between but have a look at what your favourite charities, local hospital foundations and universities and you'll find plenty of examples.

Where to from here? I'd love to see a wide range of organisations sharing the story of how they set up a bequests program and what their results have been.

Tanya is a fundraising professional and CEO of Brighter Lives which is the official hospital foundation for Townsville Hospital and Health Service, based in North Queensland, Australia and encompassing more than 20 hospitals and regional health services. Contact Tanya on LinkedIn if you'd like to connect.

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Post Covid-19 – a new governance wave

Damien J Smith AM ■

An Irreversible Shift

Many boards are realising the need to embrace a new wave of governance which seeks to shift the organisation's focus towards decentralisation, transparency, and collaboration, and the implementation of policies that promote staff well-being, leading to a surge in creativity, productivity, and staff satisfaction.

The Past is the Past

The traditional hierarchical structure is under challenge and while an alternative may still be forming, one option does at least challenge the Board and senior management thinking.

Some organisations are at least partially embracing a holacracy, where authority and decision-making is distributed across self-organising teams. Those organisations that have embraced allotting teams the autonomy to make decisions and take ownership of their work, may see their employees feeling empowered and foster a sense of ownership and accountability.

The decision is not about one or the other, rather, what are the important aspects which can be adopted that will work best in your organisation. Questions which may be worth exploring might be:

1. Clear lines of authority from top to bottom versus distributed power and decision-making among self-organising teams.

2. Fixed job titles with defined responsibilities versus individuals with multiple roles and responsibilities that reflect the needs of the organisation.

3. Decisions made by managers or leaders versus decision-making authority is distributed and decisions are made by the team members who fill the roles related to that decision.

4. Greater time to adapt to change versus designed to be agile and responsive.

5. Less transparency across all levels of the organisation versus making all roles and responsibilities clear and visible to everyone in the organisation.

6. Having accountability upwards versus each role having clear expectations and accountability, fostering a sense of ownership among team members.

Laws and Regulations

New laws and regulations are emerging piled on top of existing laws and regulations, creating an even greater compliance challenge for Boards to attempt to navigate.

With apologies to a current advertisement, Directors may well be heard asking – "Did someone say, 'More laws and regulations'?" and the collective response from Directors could well be "………. and take my time."

For Directors, time is far from elastic. In fact, time is now an even scarcer commodity with Directors constantly challenged to try and squeeze more into the time already allocated for Board duties.

COVID-19

It is clear that the COVID-19 pandemic has significantly impacted the operations of boards across various organisations. It was not just management but Boards also, that needed to quickly and effectively adapt to the pandemic. The new and often, improved ways of working, has clearly outlasted the port-pandemic period. Ongoing features that appear to now be more permanent include:

- increased collaboration between board and management
- implementation of new structures and processes
- flexibility in agenda setting
- focus on resilience, and
- more time commitment to board-related work
- many organisations were caught short by the pandemic.

Some of the areas of challenge included:

- The suddenness, novelty and seriousness of the issues faced.
- Often, no crisis-management processes in place to confidently initiate the organisation's response.
- Boards with few, if any, processes to guide them at the start – needing to make it up on the run.
- Little, if any, working experiences other than face-to-face interactions.
- Directors struggling to feel engaged and understand how to contribute in a meaningful manner.
- Choice of and getting up to speed with use of remote-working tools.
- Board and management needing to work as one challenging traditional view of respective roles.

What is Shaping Today's Governance?

Enterprise Care is already noting emergent governance trends that are redefining the role and responsibilities of Directors and the work of their Boards. COVID-19 launched the Board into a new arena of governance and forever replaced the former one. The legacy of COVID-19 continues to strongly shape how Boards are to operate and perform in the future. The future Board has a short-term period in which it needs to successfully address the following:

1. Review and stress test the present Board composition especially to ensure it has the right mix of skills, experience, and diversity to meet the organisation's immediate and ongoing needs.

2. The role and responsibilities of Directors will need to be redefined and boards prepared to be more open, transparent and accountable, especially to the organisation's stakeholders and the community generally. There is a strong sense of fairness that Directors and Boards now need to demonstrate that they are holding themselves accountable in the discharge of their obligations, and an annual independent Board review is a good way to show this.

3. The relationship between the board CEO and senior leadership has emerged with unanswered questions involving the Board/Management Dynamic. The uncertainty involves exploring the balance of being engaged in the organisation's business because of operational and financial challenges and fiduciary expectations and resolving the future balance between stewards of the organisation and being valuable collaborators with management.

Post Covid-19 – a new governance wave

4. Linked to the above is a Board's demonstration of it being fully informed, committed and taking an active role in overseeing the organisation's sustainability strategy and holding the organisation accountable by reporting on its achievements across the social, environmental, and governance performance.

5. Better understanding of the digital transformation occurring especially within their organisation's industry or sector; as well as developing and then overseeing the organisation's digital strategy and aligning it the current business strategy.

6. Another matter creating immediate significant impact concerns how Boards are handling their organisation's culture, the level of engagement and focus the Board has on creating a culture that aligns with the organisation's purpose and values, including promoting diversity, equity, and inclusion.

Resetting the Board Governance Shift

As stewards of the organisation's future, Directors and Boards are now seen to hold a potential power to be a positive forceful contribution in delivering good to a broader group of stakeholders. It is no longer a single wave that has washed up on the shore but continuous waves that expect organisations to adapt and adopt a significant community role that delivers good to more than one section of the stakeholder group.

Boards of the Future Matter

Boards are expected to now step up and deliver in a post COVID-19 world and shake off their old passive self and put on a more energetic, connected and accountable self. Boards that adopt the principles such as decentralisation, transparency, collaboration, and staff well-being, can nurture an organisation that creates a culture that fosters innovation, engagement, and success.

Damien is a passionate champion of governance empowering organisational health. Every organisation shares key drivers for achieving alignment around a clear vision, strategy, and culture. While differences of bias may exist across leadership, talent or innovation, essentially, an organisation's building blocks yields key performance outcomes that can be benchmarked and adjusted over time. Damien enables Boards to connect their governance practices to better organisational performance outcomes.

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Structuring the strategic board agenda

Steven Bowman ■

One of the most effective tools to assist the Board to be more strategic is the design of the Board agenda. In general, the more strategic items should be at the beginning of the agenda. All items that are for noting should be at the end of the agenda (confirmed as read at the start of the meeting). Items that are for monitoring should be summarised as dashboards or graphics with questions or implications provided for the Board to consider.

> **Practical Hint: Directors have observed that Board agendas which provide hyperlinks to more detailed information make it easier for them to focus on key issues, whilst easily accessing supporting information if required.**

It is essential to provide a section of the agenda that directly relates to refreshing Board strategy. This section often has a heading similar to "Changes to Strategic Environment" or my personal favourite "Strategic Gossip". This agenda item is usually at the start of the agenda or directly after the discussions on key strategic issues. It provides the space for Directors to raise issues they have come across through reading, interactions or reflection, filtered through the potential strategic issue or strategic implications for the sector and the organisation. This is the place where Directors can raise potential discussion topics based on "whispers of the future", the possibles, the maybes, the perhaps they have come across that may have a strategic impact in a few years. This then provides the opportunity for the organisation to do some further research, and for the Board to reflect on whether the existing strategic plan is robust enough to deal with this potential strategic issue.

Board Agenda and Board Reports

The way a Board agenda is structured will dynamically affect the quality of Board focus and its ability to handle the big decisions that are required to create the future. This is further supported by the quality of Board reports that provide succinct, focused information that facilitates the Board to understand the choices they have. The Board agenda and the Board reports need to work in concert with each other. If the Board agenda is focused on receiving reports on activity, and the Board reports only provide updates on activity, then the Board is not fulfilling its purpose.

It is imperative that the Board and the members of the Executive Team collaborate in a close and productive partnership. Both groups must ensure that the Board maintains an appropriate focus on the Board-approved Strategic Priorities.

The Chair Owns the AGENDA-Sequence of Events

Who prepares the first draft? Usually the Company Secretary, the CEO or the Board Secretary. This then needs to be approved or amended by the Chair. The draft agenda and the Board papers need to be sent to all Directors at least 5 days plus a weekend, prior to the Board meeting. Two days prior to the Board meeting, schedule a time for Directors to seek clarification or request the Chair add items worthy of Board discussion. It is the Chairs decision what is on the Agenda and what is not. If the Chair is not managing this well, assist them or replace them (circumstances depend on how the Chair was appointed-by the Board or by members/shareholders).

The Top 13 Practices…

1. Place your Vision at the Top of the Agenda

This can remind all present 'why' your organisation exists and why you are there; it is not just for the sake of holding meetings. It can also be used by the Chair to draw people to consider where the conversation should go. It can also be used to guide behaviour of recalcitrant Board Directors.

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Structuring the strategic board agenda

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2. Create a Colourful Cover Sheet or Include a Service User Story

Plan International uses a Cover Sheet for every Board Agenda pack. They include a photograph of their important work or key projects plus a short description. This can help to remind Board Directors of the reasons for why the organisation exists. Alternatively, spend 10 minutes exploring a service user story or a "Mission Moment".

3. Place Strategic Matters Ahead of Operational Matters

This helps to overcome the problem we see too often where a meeting delves into operational matters for extended discussions and then finds there is not enough time left to deal with the strategically important stuff. Prioritise the first part of the meeting for strategic matters. Rather than a CEO Report, create a CEO and Executive Team Report on Strategic Priorities and align it to Strategic Plan Structure and deliverables. A key section of this report should be "What keeps the CEO awake at night".

4. Use a Consent Agenda (also called a Block Agenda)

The Consent Agenda technique is a powerful tool that reduces the amount of time spent on reports that are 'For Noting' only. This is sometimes called a Block Agenda (i.e. where a group of items are placed together and approved by the Board as a 'block').

These items for Noting Only will be voted to be accepted as group (or as a block item). Up to 48 hours before the meeting, Board Directors may request that the Chair take an item off the Consent Agenda item so that it can be discussed by the full Board. It is at the discretion of the Chair whether to allow the item to be moved onto the Agenda for discussion (or not).

This technique separates out matters that the Chair and CEO believe are not worthy of any discussion, usually only reports on progress or information with no action required. If the Chair is not convinced by this Director, then the Chair can still recommend that all 'consent agenda items' are accepted as they appear in the Agenda. As well as separating out Items for Noting, you should also have Items for Discussion and Items for Decision by the Board. Please note that any Items for Information should be sent out separate to the Agenda, or stored in a Resource Library or Board Portal.

5. Colour Code the Agenda for the Action Required by the Board

On the Agenda, you can colour code the item, depending on the action required from the Board:

- Use green for   "Items for Noting"
- Use amber for   "Items for Discussion"
- Use Red for   "Items for Decision"

6. Create a Standard Heading on All Reports

This heading should read "Strategic Implications for Board Discussion" (or similar). Some of the time, there may be a single word "Nil" under this heading. Other times, staff or Board committee will appropriately articulate the issues of strategic importance that the Board needs to consider. Even if the word "Nil" appears, the mere presence of this heading may prompt a Director to raise a strategic issue or question related to the topic.

7. Careful use of Ratios

When determined in advanced, some selected, key ratios can help the Board to focus on the strategic issues behind the finance and other numbers. If you use ratios, create a legend to explain what they mean. This can be helpful to Directors who are not familiar with the use of these ratios. It can also introduce clarity as there are some ratios that are defined or used differently in different sectors. Define the trigger points for action should the ratios fall outside the acceptable and agreed levels.

8. Manage 'Board Owned Risks' and Seize Opportunities

By creating a separate classification for Board owned risks, the staff team can more easily summarise the risks that require attention and oversight by the whole Board. Naturally, the Board Committee overseeing risk should see greater detail and monitor the treatment of major operational level risks. The CEO and staff must maintain even stronger vigilance over all risks.

Remember: Any risk identified can present potential business opportunities, especially if you can manage them much better than your competitors. Help the Board focus on the opportunities associated with risks by considering the opportunities and the potential increase in business available.

9. Use Dashboard Reports (Sparingly)

These summary style reports can graphically represent and summarise key data. Make sure that the dashboard reports are measuring the items that represent the real health /real impact of the organisation. While it should cover operational and financial matters, don't forget to include key people measures like culture, satisfaction, staff and safety matters. Trend information, and succinct commentary from management can also be integrated into Dashboard reports to make them more useful for Directors.

10. Use Leading Indicators, not Lagging Indicators

Like most financial reports to Boards, many operational reports also look backwards at what the organisation has done. Though sometimes challenging to define, Leading Indicators can become a useful proxy measure for future success of the enterprise, rather than what is already behind the organisation.

11. Measure the Right Things

Often Board reports are full of data that are unhelpful as information for Directors (or even management). Client numbers and targets often figure prominently in many Board reports. One client might generate $10,000 per year in services with the organisation; another one may generate $800,000. Some clients cost you money to service; others yield a surplus to support the whole business. While many organisations measure new clients signed up, they often fail to disclose how many clients were lost, and what the full year impact of those losses are worth to the organisation. Finally consider benchmarks and targets. Are you measuring the real outcomes of your work, or just activity or outputs?

12. Include a CFO and CEO Declaration

Every Financial Report provides useful information for Directors about Financial Performance. At the end of the Financial Report/s, the CFO should include a declaration to the Board that they believe the organisation is solvent. Also include details of currency of key payments to external parties relating to Superannuation Guarantee, other Super funds, and the ATO for PAYG and GST. Include date paid up until, and the date next payment is due. CEO should countersign this declaration and key information.

13. What Should be on Your Agenda in the Next Year or so (Hint: Culture and Artificial Intelligence)

After several recent Royal Commissions in Australia, it is certainly clear to Conscious Governance that organisational culture must become a stronger point of focus for all Boards. As a start, you should ask each Director and the full Board "Is the culture of our organisation where the Board requires it to be?" And the next questions should be around how AI will affect your organisation and the sector, and how the Board can play a role in developing policy and guidelines.

Steven Bowman has 30 years of experience bridging nonprofits and corporates. As the Managing Director of Conscious Governance he brings a great depth of experience facilitating Board reviews, strategic planning, and in-house Board development.

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Association leaders' responsibilities in an evolving risk landscape

Tyler Speers ∎

Association leaders bear significant responsibilities in efficiently managing ever-changing risks. While their primary duty is to advance the association and deliver value to members, this must be balanced with effective risk management.

This article explores five critical risk management responsibilities for directors: Compliance, Risk Assessment, Insurance, Cybersecurity, and Professional Development.

1. Legal Compliance and Governance

Directors must understand and uphold legal compliance and governance standards relevant to their industry, especially in the not-for-profit sector. They must also adhere to their association's constitution and bylaws.

Case Study 1: Governance Oversight. A prominent Australian association faced legal challenges due to governance oversights, including financial oversight lapses, lack of transparency in decision-making, and unaddressed conflicts of interest. These issues led to financial mismanagement, legal disputes, reputational damage, and membership cancellations. Once the dust settles, it can take years to win back member's trust.

2. Risk Assessment and Management

Directors should actively evaluate and manage risks that span legal, financial, operational, and reputational domains.

Case Study 2: Proactive Risk Mitigation. Amid the 2020 pandemic, an Australian association conducted a comprehensive risk assessment, identifying potential disruptions to their events. Swift adaptation to virtual events ensured business continuity and strong member engagement.

3. Insurance Coverage

Insurance is an important piece of the risk management puzzle and directors should make sure it is being leveraged properly. This starts with working with a specialist insurance advisor, but directors should upskill themselves on the relevant policies.

Case Study 3: Insurance as a Safety Net. An Australian association faced a legal dispute by members alleging directors' breach of duties. The association's Directors and Officers coverage (included in Association Liability policies) responded to pay the legal defence costs to dispute the claim.

4. Cybersecurity Preparedness

Directors must keep pace with ever-changing cybersecurity threats. The expectation on directors is to be aware of current trends and requirements around Privacy Laws, Cyber Security, Confidentiality, and Incident Management.

Case Study 4: SEC's New Cyber Rules. In America, the SEC have implemented new cyber rules which mandate more robust measures to protect sensitive financial information. Although directed at US firms, it is a warning for Australian associations on what is likely to come and why it is important to start bolstering their cybersecurity defences.

5. Professional Development

Sustained learning is pivotal for directors to remain abreast of industry trends and best practices in risk management.

The above case studies highlight how important it is for directors to be able to move quickly and adapt to any scenario. Staying up to date in the industry is imperative to meet minimum expectations for directors and ensure the stability of the association.

In Summary

Risks facing associations change rapidly, and expectations on directors are higher than ever. While growing associations and providing value to members is vital, protecting the organisation from key risks is equally important. Association leaders must balance these responsibilities diligently.

Tyler started at KBI after moving to Perth from Canada in 2016 and has several years of experience in the North American and Australian insurance industries. He has had roles in both Underwriting and Broking, which gives him an understanding of both sides of the insurance market. Before entering the insurance industry, he finished university with a focus on business management, insurance and risk management, including multiple insurance certifications.

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Why digital transformation projects fail: Five most common pitfalls to avoid

Olena Lima ■

In today's rapidly evolving digital landscape, associations increasingly recognise the importance of embarking on a digital transformation journey to stay competitive and relevant. Digital transformation is not merely about adopting the latest technologies; it's a holistic process that reshapes the way associations operate, engage with members, and deliver value.

Over the past seven years, our team has assisted a number of associations with their digital transformation efforts. From embracing the latest digital marketing tools and helping with the urgent set-up of learning management systems and online communities during the pandemic to navigating the unsynchronised pieces of software into integrated tech infrastructure, we've helped associations navigate this complex process.

In this article, I'll explore the five most common pitfalls in the digital transformation journey I observe in my practice and provide insights on how to avoid them.

1. Insufficient Strategic Planning

One of the most common pitfalls in the digital transformation journey is inadequate strategic planning. Associations often rush to adopt new technologies without a clear understanding of their goals and objectives. Sometimes, they embark on the digital transformation journey simply because 'everyone is doing it' while other times, a persuasive software salesperson convinces them to buy a shiny new solution to solve all their business problems. The common assumption is that implementing new technology will naturally drive business transformation. Unfortunately, it won't. Figuratively speaking, if you can't drive, even the latest model of Ferrari won't take you too far. Business processes and objectives must always come first.

To avoid this pitfall, it's important to ensure that digital strategy aligns with your association's mission and objectives and is based on a comprehensive assessment of your current business processes, member needs and industry trends. Engaging key stakeholders to gain their insights and perspectives, and creating a roadmap that outlines specific goals, milestones, and KPIs to measure progress are the first essential steps in embracing new technology.

2. Neglecting Member-Centricity

A second common pitfall of digital transformation is losing sight of members and their needs, expectations, and feedback. Associations exist to serve their members, and any digital transformation initiative should prioritise enhancing the member experience. When rolling out a new system or technology, we often see that associations focus on internal processes and the technical side of testing, and the user testing stage simply doesn't exist.

To avoid this pitfall, gather insights from your members about their preferences, pain points, and digital expectations. Conduct surveys, hold focus groups, and analyse your digital data to gain a deep understanding of member needs and behaviour. Member and team journey mapping can be a great first step in building your roadmap to digital transformation, and using member experience information to tailor your digital initiatives will provide personalised experiences and value.

3. Underestimating the Importance of Data

It never ceases to surprise me how often data management is overlooked in digital transformation projects. When moving to a new AMS/CRM, it's not rare that software providers don't include data assistance in the project. As a result, this step is often neglected, and the client doesn't understand the scale of data migration. Sometimes, it results in losing a lot of historical data, or data being migrated unstructured and unclean. Another thing to look out for is data security and privacy. Most likely, you've heard about the nationwide data breaches happening in recent years across different businesses. Another common issue is not complying with the Spam Act.

For example, marketing emails being sent from different email software, and when a user unsubscribes in one system, they continue receiving communications from another software. This oversight can have severe consequences, including breaches, legal issues, and reputational damage.

To avoid these pitfalls, prioritise data security and privacy from the outset of your digital transformation journey. Develop clear data governance policies that outline how data is collected, stored, used, and shared, ensuring compliance with relevant regulations, such as the Australian Privacy Act 1988, or GDPR if you work with global audiences. Educate your staff and volunteers on data security best practices and the importance of protecting sensitive information.

4. Underestimating Time and Resource Requirements

Another common pitfall of digital transformation is the tendency to underestimate the significant time and resource requirements involved.

At the beginning of a digital transformation project, the initial question is often centred around the cost of the software. However, it's important to remember that digital transformation involves many hours dedicated to planning, implementation, testing, and ongoing maintenance. Another critical aspect is the setting of realistic deadlines. It's not unheard of hearing such ambitious timelines as 'needing a new CRM within eight weeks'. While it's theoretically possible to implement a new tool within this timeframe, doing so while maintaining uninterrupted service to your members and ensuring proper integration with current systems is a challenging task. Over-reliance on software providers or consultants is another common pitfall. While software experts provide valuable assistance, it's crucial to recognise that no one knows your organisation, your members, and your unique challenges better than your own team. Consultants can guide you, but your team members should actively participate and take ownership of the project. If your team needs more confidence with technology, consider investing in their training, as tech skills are as crucial as any other business skill in today's digital landscape.

When considering resources for your digital transformation, it's important to look beyond the software implementation cost. Consider expenses related to your team involvement, data migration, ongoing software subscriptions and maintenance, training, technical support, and future upgrades. This comprehensive approach to budgeting will help ensure that you are adequately prepared for different aspects of your digital transformation journey.

5. Not Accepting that Digitisation is Dynamic

Last but not least, it's important to avoid the notion that digitisation is a destination rather than an journey. Some organisations may fall into the trap of developing a rigid three-year digital transformation roadmap with no room for adaptation or change.

The necessity to adapt to the realities of virtual events and remote teams during the COVID-19 pandemic, and AI's unexpected grand entrance into our daily lives this year, are examples of the dynamic nature of digitisation.

This dynamic nature of digitalisation brings us back to the importance of items #1 and #2 in this article – digital transformation is not solely about technology; it's about aligning current technological opportunities with your association's strategic goals and meeting the evolving needs of your members and industry.

Digital transformation is a journey that holds immense potential for associations to thrive in the digital age. However, it's not without its challenges. When embarking on a digital transformation journey, it's important to remember that it's not an ad-hoc project, but an ongoing process. Embrace it as an opportunity to evolve, enhance member experiences, and achieve your association's long-term goals.

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The emperor's new CRM – do not go down the highway to hell

Jeremy Chapman ■

In today's fiercely competitive landscape, marked by ever-evolving customer expectations, membership organisations face a multifaceted challenge. They must not only procure services that align with market value but also ensure timely delivery and transparent invoicing. The solution to this complex puzzle often resides in the strategic deployment of Customer Relationship Management (CRM) systems.

These systems extend a compelling promise to organisations, offering:

- enhanced service offerings that resonate with members
- strategies to maintain and even expand market share
- a laser focus on customer needs and preferences, and
- effective cost control to ensure financial stability.

But beware the allure of these promises. Like the emperor in the timeless fairytale, decision-makers must not be swayed by mere rhetoric. A deep understanding of the organisation's functions and future goals is vital. Failure to do so may lead to a costly revelation: a system that fails to deliver, leaving the organisation exposed to an uncomfortable truth. Like the emperor left exposed, an organisation may find itself grappling with a system that fails to deliver on its promises.

How to Plan for a CRM

1. The importance of understanding needs

The journey towards choosing the right CRM system begins with understanding the organisation's needs. Knowing what the system must handle, deliver, and control is paramount. It involves mapping interactions, understanding products, and knowing how they should be managed. A thorough analysis of the organisation's current processes, goals, and pain points is essential in this phase.

2. Visibility, control, and customisation

CRM systems streamline essential processes, from member subscriptions and event registrations to comprehensive financial management. But the real magic lies in customisation. While standard solutions offer robust functionality, the ability to tailor a system to an organisation's unique needs adds a layer of agility and responsiveness. Customisation allows for a more intimate alignment with organisational culture, goals, and specific challenges. However, this flexibility comes with a caveat. Customisation can lead to increased maintenance costs and potential compatibility issues down the line. It's a delicate dance between customisation, which offers a perfect fit, and standardisation, which promises ease of maintenance and broader applicability.

> This balance raises a critical question: Should a company adapt to the process embedded in the design of the solution, often touted as industry best practice? Or should it seek a more personalised approach?

A solution built on 'best practices' is often a reflection of a group of individuals' ideas on problem-solving. It may work brilliantly for one organisation but falter in another with different complexities and needs. The one-size-fits-all approach is a myth in the world of CRM systems. Success lies in understanding that every organisation is a unique entity, with distinct challenges and aspirations.

3. Integration challenges and cost considerations

Integration with existing operational systems is a critical consideration. A poorly integrated solution can lead to dependency on a specific provider, making future transitions challenging. Additionally, implementing a CRM system comes with significant expenses, including purchase price, annual maintenance, user licenses, and training. Analysing current processes to determine if the investment will provide the expected benefits is essential.

4. Avoiding common mistakes

Organisations often fall into traps when seeking technology solutions. Defining the solution solely as an IT matter, assuming technology will solve all efficiency issues, relying solely on consultants for best practices, or assuming expensive solutions are better are common mistakes. These pitfalls can lead to compromised solutions and liabilities. Awareness and strategic planning can help avoid these common errors.

5. Know what you want to do!

So, what steps should a company take to ensure that they actually invest in a solution that is going to support the necessary improvements that are needed to help drive efficiency?

The key is knowing what you want to be able to do. It is necessary to know what it is that you actually do and how the different processes of the company work together to achieve this. Simply, undertaking the following exercise:

1. map the interactions and information that you want the solution to handle

2. understand what you want the solution to deliver, and

3. know the products and how they should be controlled.

Listen out for responses that follow the pattern: 'we could do that', 'that's on the roadmap', 'our other clients have never raised that point before'. They all mean the same thing: the solution doesn't deliver what you're asking for. The solution becomes a compromise, and too many compromises become a liability.

6. The right approach

Understanding exactly what you do, and therefore knowing exactly what you need, is not as easy as it sounds. The question, 'what do you do?' is usually answered with a list of actions, not with a set of results. All the information is already in the company. Finding out what you need has a cost in time and sometimes in outside help, but benefits are far greater. 'Something is better than nothing' is not a true statement with technology solutions. The wrong something can be far costlier than not doing anything at all.

A Checklist

*   **Define clear objectives:** What are the specific goals and needs of the organisation?

*   **Assess current processes:** Where are the inefficiencies, and what needs improvement?

*   **Evaluate customisation needs:** How much customization is required, and what are the associated costs?

*   **Consider integration**: How will the new system integrate with existing platforms?

*   **Budget analysis:** What are the total costs, including purchase, maintenance, and training?

*   **Avoid common pitfalls:** Are you aware of common mistakes and how to avoid them?

*   **Explore alternatives:** Have you considered other solutions that might be more cost-effective?

*   **Consult with experts:** Have you sought professional guidance to ensure the best fit?

*   **Plan for implementation:** What is the timeline, and who will be responsible for each phase?

*   **Measure success:** How will you evaluate the success of the new system?

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Stop talking about culture and do something about it

Jamie Notter ■

When I'm out on the speaking circuit talking about culture, people frequently come up to me and say "Wow, you guys must be swamped these days, culture is all everyone's talking about!" And culture is the number one challenge on leaders' minds today. These comments started about a year ago, but interestingly we're not "swamped." We're busy, to be sure, but we've been consulting on culture change for many years now, and the pattern today doesn't feel much different than the pattern from a few years ago: **the people who talk about the importance of culture are still vastly outnumbered by the people who are doing something about it.**

It doesn't seem logical. Leaders will agree with me that culture drives employee engagement. They will agree that culture problems reduce the effectiveness of their employees and make attracting and retaining the best talent harder. Yet, year after year, they have no plan in place to make culture stronger. If they know they have these problems, then why are they not solving them?

I think the answer is that they think culture change is out of reach for them. Conventional wisdom has told leaders for decades that culture is almost impossible to understand, let alone change. I once heard an association CEO declare at a conference that it takes a minimum of eight years to change a culture. No one challenged her; everyone just nodded in agreement.

Yet that statement is staggeringly untrue! You can start changing your culture tomorrow, and with manageable effort you can get visible results in about six months. Besides, culture change doesn't have a start/end date. You're either continuously managing your culture, or it is changing without your permission. But the work doesn't stop.

It's time to stop talking about culture and start doing something about it. In our research, we have found a way to make culture change more manageable. It starts by looking for your existing culture patterns, rather than trying to define an ideal culture.

Culture patterns are the parts of your culture that contain what we call a competing commitment. Your culture values something, like transparency, for example, so you're committed to people sharing information with each other. But at the same time, your culture values something else that gets in the way of that first commitment, which messes things up.

For example, does this sound familiar? Member inquiries are often met with, "I don't know, but I'll find out and get back to you," and members eventually stop going to your customer service staff for answers. By the time the other department gives them the information they need, they've missed the window of opportunity to act.

These problems exist because of a common culture pattern that we call "lagging transparency." That's when a culture values sharing information, but it doesn't value being proactive about it. If people ask for information, their colleagues will generally share it, but they usually wait to be asked. And the waiting — the lag — is what drives those problems mentioned above around poor customer service, missed opportunities, and difficulty with change keep happening.

The good news, however, is that patterns can be changed. You don't have to launch an eight-year campaign to create the perfect culture. You just find the patterns that are getting in the way and fix them.

The case study in our most recent book that defeated the lagging transparency pattern invested in what we call a "transparency architecture," rooted in people, process, and technology:

- **People:** they have a VP of Internal Communications.

- **Process:** quarterly all-hands meeting to update everyone on all aspects of the business.

- **Technology:** a carefully designed and implemented intranet.

Your solutions will look different, and that's fine. Maybe your changes will be more focused on fixing your project management systems, or finally upgrading to an AMS that can provide the right information real time. Other steps could include revamping onboarding, role modeling desired behaviors, or tweaking performance incentives. The point is, you need to look at the way your association has patterns that are holding you back, and then pick the specific things to change related to people, process, and technology that will move the needle. That's the work of culture change, and it IS within your reach. In fact, it's the one thing that's going to make you an employer of choice.

Jamie Notter is an author, consultant, and culture strategist at PROPEL, where he helps leaders create amazing workplace cultures that drive greater performance and impact. He brings thirty years of experience to his work designing and managing culture, and has specialized along the way in areas like conflict resolution and generations. Jamie is the co-author of four popular business books, including the award-winning Non-Obvious Guide to Employee Engagement, and Culture Change Made Easy. He holds a Master's in conflict resolution from George Mason and a certificate in Organization Development from Georgetown, where he serves as adjunct faculty.

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121

Build bridges, not walls:
How neurobiology can help you bring out the best in your people, and yourself

Liana Busoli ■

Throughout my years working within and alongside the non-profit sector, I've observed a commonality among all the various organisations, be they professional associations, industry bodies, or charities; they all embody a community of individuals united by a common purpose. The bedrock of these organizations and, by extension, our societies, are the relationships formed within. In a world now faced with challenges like the rapid evolution of AI, escalating climate crises, economic insecurity, persistent pandemic fears, shifting political and social landscapes, burgeoning cybersecurity threats, and the pervasive ache of social isolation, building good relationships has never been more important. We need each other more than ever.

Cultivating Safe Relationships: A Path to Resilience

To foster safe communities, we must cultivate safe relationships. The myriad issues we face can either be threats or opportunities for growth and innovation, depending on how we can cultivate safety within ourselves and our communities. This safety allows us to meet these challenges with creativity, innovation, and energy instead of fear. So, how can leaders use new understandings from neurobiology to bring out the best in our people in the face of all these challenges?

Understanding Threat Perception: Neuroception at Play

Understanding threat perception at an individual and group level is crucial. Our brains harbor a subconscious mechanism known as neuroception, where we are continuously scanning our environment for cues of safety or danger. This process, operating without our conscious awareness, evaluates cues like facial expressions, body language, tone of voice, and the general atmosphere, then triggers physiological responses accordingly.

Take the scenario where you are entering a room full of strangers for a new member networking event. As you step in, your neuroception is at work, subconsciously evaluating the expressions and behaviours of the people around. A welcoming atmosphere with smiling faces may signal safety, making you feel relaxed and open to engaging with others.

On the other hand, stern expressions and a tense atmosphere might signal danger, potentially causing feelings of unease or a desire to flee the situation. This subconscious process of neuroception plays a crucial role in how we navigate our social interactions and respond to our environment, demonstrating the consistent yet complex workings of the human brain in perceiving and reacting to our surroundings.

So how can understanding this part of human neurobiology help us navigate relationships?

Relational Safety: The Bedrock of Positive Interactions

Relational safety is about nurturing an environment where individuals feel valued, respected, and free to express themselves without fear of retribution or ridicule. This environment encourages open communication, empathy, and constructive feedback, pivotal for fostering positive relationships, promoting collaboration, and enhancing overall well-being within groups. A positive relational safety environment can influence our neuroception of safety, fostering improved communication, collaboration, and productivity. Conversely, a lack of relational safety can trigger a neuroception of danger, leading to stress, anxiety, and defensive behaviours, hindering group harmony and effectiveness. For example, when a new industry regulation emerged that impacted an association (let's call them Association X), a series of discussions were held to gather members' insights.

The environment was structured to ensure everyone felt comfortable sharing their thoughts without fear of retribution or shaming. In one discussion, members voiced concerns about the regulation, and instead of dismissal, their concerns were acknowledged, and further input was encouraged. This open communication, rooted in relational safety, led to a rich dialogue where members proposed innovative solutions. On the contrary, Association Y handled a similar situation differently. Members' concerns were met with dismissive remarks, creating a lack of relational safety, triggering stress and defensive behaviours among members, which stifled open communication and hindered effective navigation through the new regulation. This contrast highlights how relational safety can significantly impact communication, collaboration, and overall group effectiveness.

Leadership Amidst Challenges: Anchoring Staff and Members

In the face of challenges, how can leaders anchor their staff and members? The key lies in fostering relational safety across all stakeholder and staff relationships. The emotional landscape within organizations significantly influences decision-making processes. By acknowledging and validating emotions on an ongoing basis, leaders can support individuals in maintaining their internal safety zones, making organisations safer, more stable and more resilient.

A Case in Point: Navigating Organizational Change

An executive coaching client was leading their team through a major organizational change. Through the lens of neuroception, we were able to identify together how the change process was being perceived as a threat, triggering stress responses in staff, which in turn impacted their support for members. I supported my client in intentionally fostering relational safety with staff by slowing down, practicing active listening, showing empathy and compassion, validating concerns, and enhancing clarity. The client was then able to engage staff more fully in viewing change as an opportunity, thereby facilitating the change and strengthening team trust.

The Interplay: Relational Safety and Neuroception

The interplay between relational safety and neuroception provides a deeper insight into the human-centric approach necessary for cultivating a positive, productive, and psychologically safe environment within organizations and groups. Investing in relational safety creates a foundation for enhanced interpersonal relationships, improved well-being, and overall organizational success, enhancing the reputation of associations and attracting members. Paying attention to relational safety creates a solid foundation for associations striving for success, resilience, and sustainability in today's evolving landscape.

Five tips to support relational safety:

1. **Encourage Open Communication:** Foster platforms for respectful, open discussions.

2. **Practice Active Listening:** Show genuine interest in other's input.

3. **Educate on Neuroception:** Raise awareness about neuroception's impact on interactions.

4. **Promote Mindfulness:** Encourage mindfulness oganized neuroceptive responses.

5. **Provide Regular Feedback:** Offer constructive feedback to support growth.

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Ahead of the curve:
An overview of talent trends in 2024

Olivia Sporton ■

The talent landscape is changing, and as association leaders, it's crucial to stay ahead of these shifts. Transitioning towards an 'employee's market' signifies a departure from the old norms, emphasising adaptability and foresight. Recognising and preparing for emerging talent trends is about more than just keeping pace; it's about strategic advancement in a dynamic setting where work and talent engagement norms are being reshaped.

Responding proactively and having a clear understanding of the evolving talent dynamics are pivotal. Here are some critical talent trends and practical steps associations can take to navigate this transformation:

Diversity, Equity, and Inclusion (DEI): Beyond Buzzwords

The upcoming gender pay gap report by the Workplace Gender Equality Agency (WGEA) is likely to intensify discussions around gender equality. This scenario presents a prime opportunity to:

- Review compensation practices thoroughly, making necessary adjustments.

- Ensure DEI strategies are ingrained within the organisational culture, not just documented on paper.

- Adopt fair and competitive remuneration banding that aligns with our core values.

More Than Just Monetary Compensation

While a competitive salary is fundamental, modern employees are seeking more. Here's how we can enrich the offering:

- **Benefits:** Flexible work hours, wellness allowances, and robust leave policies can make a difference.

- **Work/Life Balance and Wellbeing:** Fostering a culture that values wellbeing could be more enticing than just a salary increase.

- **Training and Upskilling:** Offering continuous learning opportunities keeps our teams adaptable in a fluctuating market.

- **Personal Fulfilment:** Creating a fulfilling work environment enhances retention and attracts potential talent.

Engagement: More Than Just a Term

Engagement is no longer a buzzword, but a critical component of a thriving workplace. With some managers identifying motivation as a significant challenge, assessing and boosting engagement has become imperative. Tools such as the Employee Net Promoter Score (eNPS) serve as valuable metrics to gauge the pulse of organisational engagement. However, diving deeper into engagement involves:

- **Regular Check-ins:** Foster a culture of regular feedback and open communication. This can be facilitated through one-on-one meetings, team huddles, or digital feedback platforms.

- **Recognition and Rewards:** Recognising and rewarding employees' efforts go a long way in boosting morale and enhancing engagement. Tailored recognition programs can significantly impact employee satisfaction.

- **Career Development Opportunities:** Providing clear pathways for career growth and development is a sure way to keep employees engaged and invested in the organisation.

Embracing Technological Advancements

The wave of digital transformation is reshaping the workplace, bringing with it a host of technological advancements in automation, Artificial Intelligence (AI), and cybersecurity. As association leaders, adopting a balanced approach towards embracing these changes is crucial:

- **Adoption and Adaptation:** Being open to adopting new technologies while ensuring a smooth transition for all members is key. This includes offering training and support to help individuals adapt to new tools and systems.

- **Cybersecurity Measures:** With the rise in digital platforms, ensuring robust cybersecurity measures is paramount to safeguard sensitive data and maintain trust.

- **Evaluating Technological Investments:** Assessing the value and impact of technological investments ensures that resources are allocated wisely. This includes evaluating the ROI of new technologies and ensuring they align with the association's strategic goals.

- **Encouraging Digital Literacy:** Promoting digital literacy across the organisation enables a more seamless transition into a technologically driven workspace, reducing resistance and fostering a culture of continuous learning.

Adapting to these talent trends is about nurturing an environment that attracts and retains top talent, while also propelling our organisations forward amidst evolving narratives. By keeping a finger on the pulse of these trends, association leaders are well-positioned to guide their organisations through the promising journey ahead.

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Imposter syndrome in associations: Are you out of sync with your true values?

Sam Osborne ■

Remember this: an individual who is living out of alignment with their values is an impostor. Whereas an individual who is living in alignment with their values is authentic…Let me explain.

Have you ever felt like you're wearing a mask at work, pretending to have it all together? Perhaps you've got a decade or more worth of experience in associations, yet you still have the fear of being exposed as an intellectual phony?

Perhaps you've recently scored a directorial position in a top-tier association. But instead of basking in the glory of your new role, you're plagued by self-doubt. Sounds like a case of Imposter Syndrome. Many of us have been there, feeling like an "imposter" despite our achievements.

I'll cut to the chase: imposter feelings aren't just random insecurities; they are a result of unrealistic comparisons to others, and more specifically, to subordinating (often unconsciously) to the values of other people. The solution: compare your daily actions with your values, not the values of others.

Some Background Information

The term Imposter Syndrome isn't new. It's been around since the 1970s – originally coined Imposter Phenomenon by Dr. Pauline Rose Clance and Susanne Imes. To this day it isn't considered a syndrome or mental illness, and it's yet to be included in the DSV-5 (Diagnostic and Statistical Manual of Mental Disorders). However, Imposter Syndrome is how most people refer to it and search for it (according to Google Trends).

The suggested causes of imposter phenomenon range from anger, rules, and conflict in childhood, the subsequent development of a more appealing identity (or false self) to please our rule makers as a child, our beliefs around intelligence — are we born with a default amount or can we increase it with training and experience, our expectations of success, and narcissistic (self deceptive) thoughts.

The surface level solutions include talking to others about it, especially people who have experienced Imposter Syndrome too. This reduces feeling alone, cultivates positive relationships, and assists in navigating challenging life situations. Reframing also has some value as does changing the culture at work to include more personal and professional development.

Human Behaviour Expert, Dr. John Demartini, however, offers a fresh take on it. He believes that when we're out of sync with our true values, we feel like frauds. It's like trying to fit a square peg into a round hole; something's bound to feel off. Imposter Syndrome is a result of subordinating to the values of others (usually one or more specific individuals in our respective histories) a parent, a teacher, a work colleague — someone we put on a pedestal and exaggerate via an incomplete story we tell ourselves about them. Consequently, we inject the values of others into our lives, and we try to live up to those values as if they were our own. We minimise what is truly valuable and meaningful for us, rather than acknowledging and honouring our values and acting, not from a place of desperation and fear, but from a place of inspiration, leadership, and confidence.

Some Stats and Facts

Did you know that a whopping percentage of professionals grapple with imposter feelings? Some quotes floating around social media say 70 per cent, whereas a recent academic publication (Prevalence, Predictors, and Treatment of Impostor Syndrome: a Systematic Review 2019) which looked at 62 research papers on Imposter Syndrome, found between 9 to 82 per cent of people experienced it – depending on how the participants were chosen for the studies.

Yet, from my personal experience of asking people, it's closer to, well, pretty much everyone.

The Ripple Effect of Imposter Syndrome in Associations

Whereas there isn't specific research on imposter syndrome in associations, the research is starting to show that Imposter Syndrome doesn't discriminate by sex, age, gender, skin colour, profession or industry. The research indicates that Imposter Syndrome effects nurses, lawyers, accountants, and entrepreneurs more so than other professions. However, in my conversations with some CEOs at the Associations Innovation Summit 2023 in Melbourne), Imposter Syndrome likes everyone.

The Impacts of Imposter Syndrome

Imposter Syndrome decreases decision-making skills. Often causing us to hesitate, or do the opposite, over-prepare. We enter the impostor phenomenon washing machine cycle, coming out not clean, just dizzy and exhausted.

Imposter Syndrome effects teamwork causing us to hold back our real opinions and leadership potential. Our productivity is smothered too. When we feel like a fake, our motivation takes a hit. It's like trying to run with a backpack full of bricks.

Finally, Imposter Syndrome causes anxiety, depression, burnout, absenteeism, presenteeism, and decreased retention. All having an impact on employee and member engagement, wellbeing, and the mighty bottom line.

Finding Our True North

So, how do we get back in sync? Regularly check in with yourself. Are your actions reflecting your values? If not, it's time for some introspection. Associations would be wise to initiate open dialogues about Imposter Syndrome and values. It's like tuning an orchestra to ensure everyone's on the same note. Members can benefit from mentors who know their values and can assist others to clarify their own, too. It's like having a GPS for navigating the professional world and activating our leadership capacities.

Stepping into the Authentic Self

The next time you feel like an imposter, ask yourself: "Who am I comparing myself to? What are my values? If I were being true to my values, what would I do now?" The answers are the key to feeling authentic and confident in your role.

Association leaders, HR peeps, and members! Let's champion the clarifying and alignment of personal and professional values. It's the secret sauce to combatting imposter syndrome and fostering authenticity. Cheers to being our authentic selves!

Remember this: an individual who is living out of alignment with their values is an impostor. Whereas an individual who is living in alignment with their values is authentic.

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The importance of setting (and maintaining) healthy boundaries

Mel Kettle ■

In today's fast-paced and ever-changing workplace, it's becoming increasingly difficult to maintain a healthy balance between work and personal life. Many association professionals I talk to are telling me they feel exhausted, stressed, and on the edge of burnout.

The recent Well-Being at Work Survey indicates that many employees and senior executives are struggling to prioritise their well-being. 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 individuals we have a responsibility to look after ourselves. To set healthy boundaries around things like work, time, relationships, money, technology.

Boundaries are rules and guidelines we create to protect ourselves. It's like having an invisible fence around the things that are most important to you. Sometimes you can open the gate to let something in or out, but you are the gatekeeper who sets the expectations.

Signs You Need Better Boundaries

We all have warning signs that indicate it's time to establish better boundaries, including:

- You're exhausted all the time.

- You feel resentful because you feel you're always the one doing everything.

- You feel like others are taking advantage of your good nature.

- You find it hard to say no.

- You never have time for yourself.

You might have some of these habits:

- You regularly work through lunch or stay back to get everything done.

- You check your work emails after hours.

- Members regularly call you on the weekend to have a chat about work related issues.

- You have a work from home day when you're sick, instead of taking a sick day.

- You are paid to be part-time, but often work full-time hours.

- You say yes to things you really would rather say no to.

- You spend a lot of time randomly scrolling through social media and/or watching Netflix.

- You have accrued more than six weeks of annual leave "because there is never a good time to take a break".

If you do any of these on a regular basis, then it's time to have a look at your boundaries.

Benefits of Having Healthy Boundaries

When we have healthy boundaries in place, we are more likely to:

- Preserve our physical, emotional and mental wellbeing.

- Have healthy relationships where we feel safe to communicate the needs and limitations in relationships with partners, family members, friends and colleagues.

- Prioritise our personal self-care by ensuring we get enough sleep, rest, exercise, the right nutrition, and joy.

- Have time for planning, focused work and thinking time.

*Brené Brown says, **"Daring to set boundaries is about having the courage to love ourselves even when we risk disappointing others".***

Putting healthy boundaries in place can be hard, especially if you're used to putting everyone else's needs first. However, it is worth it. Trust me when I say the future you will thank you.

How to Set Healthy Boundaries

There are a few steps involved in setting healthy boundaries:

1. Work out where you're at – how are you feeling, what are you doing, who are you spending time with?

2. Identify your core priorities – what is most important to you personally and professionally? What are your limits?

3. Create your boundaries.

4. Communicate your boundaries.

5. Maintain your boundaries.

Let's look at my client Karen. When I met Karen, she was an exhausted and struggling senior executive, juggling a lot of responsibilities at home, work and with volunteering commitments. She was in survival mode with no time to do the things she loved, and little time at work for the deep and strategic work that would drive her organisation forward. She put everyone else first and felt unappreciated, undervalued, and unnecessarily stressed.

These feelings negatively impacted her relationships at home and at work, as well as her ability to do her job to the high standards she set for herself.

Together we identified her core values and priorities. Over time, and with many small steps, Karen made positive changes. At work, she delegated more, restructured her calendar to reduce her attendance at meetings and include regular time for thinking and planning. She became comfortable with saying no to work, social and volunteer requests that didn't serve her and she created clear boundaries around how she spent her time and who she spent it with. And most importantly, she began to do more of the activities she loved. Regularly.

One of Karen's biggest challenges was maintaining her boundaries once they were in place, as this required clear and consistent communication, which can sometimes be difficult. Especially when you are going from being a people pleaser to an assertive and confident person with a strong sense of self-worth.

Communicating your Boundaries

When you start to communicate your boundaries, there are three factors to consider:

- **Be clear and specific around what you want –** sometimes it also helps to say why this is important to you. One of my boundaries is no meetings before 10am, because I like to go to the beach for a walk or swim most days. My clients know this, because I talk about it a lot!

- **Choose the right time –** if you're cranky or feeling resentful because your boundaries are being breached, that is NOT the right time!

- **Be consistent but keep a little space for flexibility –** for example, while I aim for no meetings before 10am, I'm flexible under some circumstances.

What do your boundaries look like? Do you need to improve them?

Mel Kettle is an internationally recognised expert at leadership and communication. Mel has worked with more than 80 associations to help them create real connection and sustained engagement with members, staff, partners and other stakeholders. She has been recognised in the leadersHum 2022 and 2023 Power List of the Top 200 Biggest Voices in Leadership. Mel is the author of two books, The Social Association and the best-selling Fully Connected.

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2024 Horoscope

Welcome to the whimsical stars, dear Senior Association Professionals. As you venture into the mystical realms of 2024, the celestial bodies have aligned to forecast a year of bureaucratic bliss and committee conundrums. Hold onto your membership rosters; it's going to be a wild ride!

Capricorn *(December 22 - January 19):* **The Regulatory Wrangler**

The cosmos calls upon your cardinal qualities, Capricorn. As Saturn steadies your hand, you'll tame the wild west of association ordinances with a blend of boldness and bureaucracy. Your ability to herd the cats of consensus will make you a legend in the ledger of lawfulness.

Aquarius *(January 20 - February 18):* **The Digital Dynamo**

Aquarius, Uranus ushers in a wave of wireless wisdom upon you. As the digital dynamo, you'll surf the silicon surf, wrangling rogue algorithms and data deluges to keep the association afloat in the sea of cyberspace. Your tech-tenacity will light the way through the digital dusk.

Pisces *(February 19 - March 20):* **The Empathy Oracle**

Oh, compassionate Pisces, Neptune navigates you through the nuanced needs of your members. Your intuitive tide turns turbulence into tranquillity, as you mystically mend misunderstandings and pacify policy perturbations. Your empathic essence will echo through the association ethos.

Aries *(March 21 - April 19):* **The Motivational Maestro**

Mars murmurs a melody of momentum into your ears, Aries. As the motivational maestro, you'll conduct the orchestra of objectives with an overture of optimism. Your baton of buoyancy will beckon a ballet of boardroom bravado, and your members will march to the music of motivation.

Taurus *(April 20 - May 20):* **The Fiscal Steward**

Venus veils you in a veneer of value vigilance, Taurus. Your prudent prowess in piloting the financial flotilla will steer the association through the straits of scarcity into the waters of wealth. Your ledger logic will lay the lighthouse of liquidity, illuminating the path of pecuniary prosperity.

Gemini   *(May 21 - June 20):*   **The Dialogue Director**

Mercury, your ruling planet, melds with your mental acuity to morph you into the master of messages. As the dialogue director, you'll choreograph conversations with a cadence of clarity. Your verbal virtuosity will vaporise vagueness, volleying your visions into the vistas of validation.

Cancer   *(June 21 - July 22):*   **The Harmony Herald**

Moon-magic moulds you into the maestro of morale, Cancer. Your nurturing nature nixes negativities, nurturing a narrative of neighbourliness. The chords of camaraderie will chime through the corridors of the committee, creating a cantata of cooperation among the cohorts.

Leo   *(July 23 - August 22):*   **The Vanguard Virtuoso**

Sun-soaked Leo, your vitality will vanquish the vague, venturing valiantly into the vanguard of visionary ventures. As the virtuoso of valour, you'll lead your legion with a lustre of loyalty, laying the landmarks of legacy in the landscape of leadership.

Virgo   *(August 23 - September 22):*   **The Process Pathfinder**

Mercury moulds your meticulous mind into a matrix of methodical mastery, Virgo. As the process pathfinder, you'll unveil the utopia of unambiguous undertakings, ushering an era of efficiency. Your procedural prowess will be the pulse that propels the association's progress.

Libra   *(September 23 - October 22*   **The Equity Enchanter**

Venus veils your vision with a veneer of verity, Libra. Your balanced bearing births a brigade of benevolence, bridging biases with a blend of boldness and benevolence. The scales of justice shall sing symphonies of solidarity under your sagacious stewardship.

Scorpio   *(October 23 - November 21):*   **The Strategic Sorcerer**

Pluto, your patron planet, provides a potion of profound perceptiveness, propelling you into the pedestal of planning prowess. As the strategic sorcerer, you'll weave wands of wisdom into the weft of the association's workings, warding off woes with a whiff of wizardry.

Sagittarius   *(November 22 - December 21):*   **The Visionary Voyager**

Jupiter joins your journey, jesting jovially as you juggle the jewels of judicious judgement. Your adventurous ardour amplifies, awakening an appetite for the audacious. As the visionary voyager, your arrows of ambition will arc across the azure, aiming for the acme of achievement.

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