Associations Evolve

2025 & Beyond

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Answers for Associations

Welcome

Belinda Moore, Editor-in-Chief

As I reflect on the past year, I'm struck by how the world of associations is rapidly becoming more globally interconnected than ever before. No longer are borders or time zones the significant barrier they once were. Associations are connecting and collaborating across continents in ways - and at a level - that I've never seen before. The possibilities this opens up are thrilling.

The accelerating pace of digital transformation is set to reshape nearly every aspect of how we live, work, and connect. Associations are now more essential than ever in helping the industries, professions, and individuals they serve navigate the challenges and seize the opportunities this brings. Those that rise to the occasion will become more relevant and influential than ever. Those that don't risk fading into obscurity, replaced by newer, more innovative competitors. Whether by deliberate choice, or lack of action, associations are now choosing their future.

In this edition of Associations Evolve, we dive deep into this very topic: how technology, particularly AI, is reshaping the association landscape. From enhancing member engagement to unlocking new revenue streams, AI is enabling associations to do more than ever before - often with the requirement for fewer resources. We've got stories of early AI adopters who have revolutionised everything from member communications to event planning, and insights into how you can start using these tools in your own association.

But as exciting as technology is, it's important to remember that associations are still fundamentally about people connecting with other people to achieve a purpose of mutual interest. And with the rise of automation and AI, there's an even greater need to balance technology with human connection. Several articles in this edition explore how we can strike that balance, ensuring that while we embrace innovation, we don't lose the heart of what makes associations special - community and collaboration.

You'll also find thoughtful pieces on governance, education, and strategy, along with inspiring stories of associations that have overcome significant challenges to create lasting legacies - whether by enhancing the value they were already providing or finding new ways to support those they serve to navigate a rapidly changing world. It's an exciting time to be part of this sector, and I'm so grateful for the incredible contributors who've shared their knowledge and experience in these pages.

So grab a coffee (or perhaps a glass of wine), settle in, and enjoy this year's Associations Evolve. Who knows? Maybe the next great idea to transform your association is just a page away.

Here's to breaking boundaries, embracing technology, and driving positive change!

Warm regards,

Belinda Moore

Editor-in-Chief
Associations Evolve: 2025 & Beyond

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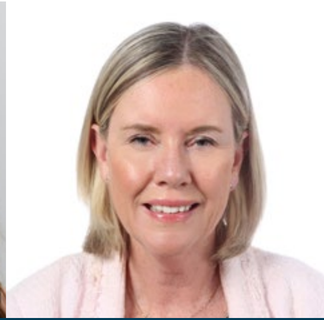
Meet the Editorial Team



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With contributors from around the world, we have retained original spelling to maintain authenticity and reflect the diverse perspectives of our contributors. Associations Evolve is an annual collection featuring thought-provoking articles by association experts from around the world. It delivers inspiring ideas, practical insights, and much-needed motivation for association professionals to drive change and innovate within their organisations.

14 Conversations Dominating Association Strategic Planning

Summary: We can't reshape the ever-changing societal landscape to fit the traditional association norms with which we are comfortable. Instead, associations must ride the waves of change, while advancing their collective purpose. Recently, these 14 conversations have been dominating association strategic planning.

How Do We ... Advance our Purpose (Not Just Member Numbers)

Your purpose is the North Star guiding your association ship into the future. It's not about cramming in more passengers; it's about the meaningful impact of the voyage itself. And it's about ensuring the right people are on the ship. Steer every initiative back to how it aligns with your purpose as it forms the "why" behind every "what" and "how." By rallying members around a sense of shared purpose, you can create an impact that resonates.

How Do We ... Adapt to Rapid Technological Change & AI Acceleration

The digital and AI revolution train is accelerating fast, whistling towards unprecedented change. Associations must gear up to spearhead this shift, not just keep up. Associations must embrace technologies to boost your own operations, as well as position your association as the definitive guide helping members to navigate digital transformation. Be the lighthouse helping members through the fog.

How Do We ... Navigate Generational Shifts

Engaging different generations is like planning a huge family reunion meal - you need options for all tastes. Understand diverse needs across your different demographics and tailor your engagement accordingly. Create a mosaic of engagement pathways tailored to the different ways different generations want to engage. Use AI to leverage content into many different forms - from emails to LinkedIn Articles to TikTok videos. Building bridges across generations will strengthen your association community and provides a solid foundation for the future.

How Do We ... Manage Increasing Competition and Collaboration

Associations face an increasing number of formal and informal competitors vying for different aspects of their traditional value proposition. Combatting this "death by a thousand cuts" scenario requires a clear focus on your purpose and the specific impact you want to make. Don't try to be all things to all people. Identify where to focus your energy to deliver distinctive member value - remaining true to what makes your association irreplaceable. To secure their competitive position, many associations are exploring collaborations with others to expand resources, increase value, and advance purpose.

How Do We ... Deliver Personalised, Relevant, and Compelling Value

The era of personalisation calls for tailored value propositions that resonate with members' diverse needs and interests. Curate compelling value offerings tailored to specific market segments such as targeted content streams, personalised learning paths, and segmented networking opportunities. Make each member feel personally valued, understood, and supported throughout their journey with your association.

How Do We ... Foster Thriving Online and In-Person Communities

Blend digital engagement with in-person interactions to foster a deep sense of belonging and connection amongst your commuity. Create online engagement opportunities that encourage meaningful, purpose-driven participation while also hosting in-person events that enable genuine human connections. Form spaces where members can come together to collaborate, share their stories, and support one another in pursuing shared and individual goals.

How Do We ... Communicate with Impact

Great communication inspires action and engagement. Cut through the digital clutter with compelling and creative storytelling that more effectively inspires action amongst your audience. Truly understand your members' preferred communication styles and needs in order to connect with them in more relevant and meaningful ways. Share your purpose and message with authenticity in the channels and formats that will best resonate with each member segment.

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Bio With over 30 years' experience, Belinda specialises in researching association trends and integrating them into strategic plans that drive results. Her deep understanding of the not-for-profit sector and AI's potential enables her to craft strategies that address emerging trends and challenges, delivering tangible outcomes and a future focused approach.

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Belinda Moore

How Do We ... Nurture a Productive and Purposeful Team Culture

If associations are bridges connecting people, then your staff team is the foundation making those connections strong. A vibrant team culture is the fertile soil in which innovation, resilience, and collective success can blossom amongst your staff and volunteers. Prioritise professional development, open communication, and taking time to celebrate achievements together, no matter how small. Empower your team with a sense of ownership and purpose, enabling them to thrive by working cooperatively towards the greater vision and goals of your association.

How Do We ... Generate Strong and Sustainable Revenue Streams

Strong and diverse revenue streams enable your association to continue advancing its purpose over the long-term. When seeking to maximise revenue, start by maximising your current revenue channels. Then look for new opportunities to generate sustainable revenue in ways that both align with your values. Once you've got something compelling to sell, don't fall into the trap of limiting your revenue due to a dislike of "sales". If you truly believe people are better off as members, then selling is just good customer service. Embrace as many of the vast number of sales channels - from marketing automation to one-on-one sales - as possible to enhance your revenue generation performance.

How Do We ... Evolve to a more Contemporary Membership Model?

Traditional membership models are evolving into more flexible, inclusive, and engaging frameworks that are better suited to today's society. Take a step back to holistically rethink what membership could look like through your association's unique lens. Explore how you can amplify accessibility, community, and the delivery of value in new ways while advancing your underlying purpose.

How Do We ... Use Data to Inform Decision Making?

Transform the wealth of data at your disposal into actionable intelligence and insights to more effectively guide planning and purpose-driven decisions at all levels. Gain a deeper understanding of your members' needs, industry trends, growth opportunities, and how to maximise your impact. Then let these data-driven insights shine a light on the optimal pathways forward at the strategic, operational, and tactic levels within your association.

How Do We ... Champion Social Responsibility and Sustainability?

Set an example of positive change from the inside out by deeply embedding these values across your associations' operations, culture, and community initiatives. Become a respected voice advocating for social causes and environmentally friendly practices that are aligned to your purpose. Inspire your members to take action by giving them opportunities to contribute through your association.

How Do We ... Demonstrate Visionary Leadership and Effective Governance?

Effective boards have a shared vision of the future. This shared vision is complemented by a clearly defined roadmap (the strategy) to its desired destination. A strong working relationship among the Board members and with the CEO, is crucial. It's this collaborative dynamic that fosters robust debate, informed decision-making, and ultimately, the successful governance of the organisation. Decisions grounded in data and evidence are the benchmarks of such boards, transcending personal opinions to deliver accountability, transparency, and a clear trajectory for the association.

How Do We ... Undertake Effective Strategic Planning?

Strategic planning has evolved significantly in recent years. Plans are now more succinct, purpose-driven and focused on the lasting impact an association intends to create. Great plans melds vision with action, tackling current challenges and setting up future success. The key is unifying stakeholders around a common purpose and charting a clear and compelling path to reach it. Planning is a collaborative process which draws on the insights and knowledge of a broad range of stakeholders - amplifying the voices of those the associations serves to determine the best pathway forward to achieve its purpose.

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Alignment - The Worst Kept Secret Behind Successful Associations

Summary: Successful associations thrive on alignment from top-down strategy to ground-up tactical execution. This requires clear goals, strong governance, transparent processes, and continuous improvement. Embracing small, iterative projects, accepting failure, and fostering collaboration creates momentum, driving progress and innovation toward achieving the association's mission.

Every Association has a constitution with written objectives. Almost all have a clear purpose document or landing page, setting out their vision mission and values. Many have a three to five year plan with broad goals. It gets a little less common to hear how the above translates into how goals are to be hit, whose responsibility is it and where will the funding or resourcing be coming from.

Successful Associations have an aligned clarity from top down strategy supported by a ground up tactical plan. It all starts with a solid governance structure, which has no shortage of books and articles written about it. We can simplify the top down, ground up alignment into these three groups, Paperwork, Purpose and Plan. The paperwork or reference material, guide and keep us on track and include items such as the constitution, charters and bylaws. This flows down to our purpose, visualised often as vision, values and mission statements and infographics.

It is when we try to move from concepts to concrete plans and contextualising this to the stakeholders it can get a bit subjective. It sounds straight forward, write the objective to meet the mission and have a team deliver them. In practice, many leaders who after a week of back-to-back committee meetings reflect on the 19th century quote from Helmuth von Moltke who coined the term "no plan survives contact with the enemy". This was later refined by Mike Tyson, world champion boxer, to "Everyone has a plan 'till they get punched in the face." The worst kept secret to alignment is the importance of collective effort and a shared vision of success to keep your strategies connected to the vision while ready for the occasional scuffle.

You might think "we are aligned, everyone in our business knows the vision and goals. You may have held a leader's retreat, staff day, board and committee meetings setting clear plans for the coming year. A recent Harvard Business Review article stated that leaders felt strategic agreement within their companies was at 82%. Upon analysis of the detailed written explanations from those same employees around what their company's strategies were, found that actual alignment was, on average, just 23%.

Goals

If you set goals you will achieve them, says every influencer. Aside from unrealistic Instagram feeds, clear goals are a must for any association and team. There are several popular methods in setting and managing them. The tried and tested is SMART (specific, measurable, achievable, relevant, and time-bound) goals, a strategy which often relies on intuition and experience. They can be a little limited by a lack of knowledge, assumptions, or we have always done it this way.

Key Performance Areas (KPAs) can also be referred to as critical success factors. Like SMART goals they need to be clear, specific, and measurable so you can determine exactly if the result has been achieved, and how well. A KPA should also be completely under your control. This means, if you do not do it, it will not be done by someone else and lastly it must be an essential activity of the business. At a more grounded level, another version is Key Performance Indicators (KPIs) which focus on specific strategic objectives. When measured and reported back they give the leadership team or board an "indication" as to whether the organisation is making progress.

Benjamin Laker was published 2024 in MIT Sloan focusing on Objectives and Key Results (OKRs) with his argument that this model of goal setting is more action-oriented providing inspirational goals that are strategically aligned with the organization's vision.

There are no doubt many other ways to set goals that leaders and consultants love to group into something like the five R's or three P's. What is commonly witnessed across most projects is that it doesn't matter what method you use, just use one that works for you and your association.

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Lindsay McGrath

Capacity

The inaugural Digital Transformation Leaders List, an initiative of The Australian Financial Review and Boston Consulting Group, identified six key success factors on whether a strategic digital transformation execution would be successful. Integrated strategy with clear goals, commitment from leadership, this flows down to high-calibre talent who have resources and capacity, brandishing a fail-fast-learn agile governance mindset. Monitored by a business-led, fit-for-purpose effective modern, scalable and seamless technological ecosystem. For many in the not-for-profit world the above is a dream due to a lack of human and financial resources. So we then have to ask, where to start?

Start Small

Don't try to do it all at once. When alignment works you have cultivated a culture of transparency and continuous improvement. You can allow for ongoing adjustments, and fast response times to changing conditions. Be ready to celebrate successes and be open and honest about setbacks. Take a moment and evaluate what would make the biggest impact to the business and your members or clients. Then weigh that against what resources you have. Choose, don't procrastinate. It is better to have the mantra of "Ready, Fire, Aim" then miss an opportunity.

Launch a small project regularly, aligned with your purpose that will create a surplus in funds or another value proposition. This will force live feedback and an update or iteration. No number of surveys will give you the direct feedback from launching a new program, service or product. Iteration leads to inspiration or what or how else could it be done. This change of mindset leads to innovation and next generation thinking, acting and leading. To close the loop, we have invention or as Plato famously wrote in the "Republic": "our need will be the real creator" which was moulded over time into the English proverb 'Necessity is the mother of invention'.

Fail Often

We are often measured as leaders on how we deal with problems or address challenges far more than our wins and successes. Be ready to fail, encourage it with your team. Have safeguards in place so as not to put at risk what you can't afford. Failure is a necessary part of success. Author J.K. Rowling is quoted as saying "It is the ability to resist failure or use failure that often leads to greater success." Ensure from Board level down innovation and the failure that potentially comes from it is acceptable.

Have Courage

Alignment isn't a new concept, it is of course harder with a smaller team, division or not for profits with limited resources. Yet it is so important. If your available resources aren't aligned, then you are currently not as effective as you could be. Inefficiencies and cultural issues will arise causing increased workload and burnout. You may have to make an active decision to stop and reset. Get your hands dirty, learn or apply a new skill to see what needs to change. Have the courage to challenge yourself first and then those above and below you to make the necessary changes. Lead up and down to get everybody on the same page. Alignment brings clarity of purpose which will attract others who are like minded. You now have a team working together with momentum looking for others to bring in and help you towards your goals.

The Next 60 Months: Six Crucial Questions for Fit-for-Purpose Association Boards

Summary: As the second half of the Turbulent Twenties begins, association boards must confront six crucial questions to ensure progress and value creation. By addressing challenges, systemic problems, and governing debt, fit-for-purpose boards can shape a sustainable future and leave a meaningful legacy.

Without a single day to spare, the most demanding work of our lifetimes is about to begin.

Although this admonition is neither easy to deliver nor accept, it is indisputable. We know all too well what has happened throughout this decade's first 60 months, and we can see the enduring harm this disruption has inflicted on our world and on ourselves. But as I **wrote** last summer on LinkedIn, "[i]f you think the first half of The Turbulent Twenties has been fraught, just wait." As **the next 60 months** of The Turbulent Twenties begin to unfold, fit-for-purpose association boards must demonstrate the resolve required of them, and all of us. There is simply no other acceptable alternative.

To strengthen their determination to move their associations forward over the next 60 months, I propose that fit-for-purpose boards engage in thoughtful dialogue around the following six crucial questions. The conversations on these questions must include the staff partners and current stakeholders who will stand with our community's boards as they confront the unforgiving conditions of a disrupted world, and endeavor together to leave their associations better than how they found them for the benefit of their successors.

Six Crucial Questions

1. How well do we understand the challenge before us?

There are myriad complicated and difficult issues that fit-for-purpose association boards will need to address over the next 60 months, all of which converge on a specific overarching challenge: directing board attention toward ongoing intentional learning. The first stewardship imperative for fit-for-purpose boards is "attention as responsibility," i.e., attention is the highest form of responsibility that boards have to the association and their work. Focusing board attention on a disciplined and rigorous process of intentional learning is a core conviction that fit-for-purpose boards must adopt and sustain to fulfill this imperative in the second half of this decade.

2. What are we here to do?

Every association openly explains and shares its reason for existence and the most important work it chooses to pursue. These statements, whether described as "vision," "mission," or "purpose," represent an organization's expressed intentions. Fit-for-purpose boards understand that over the next 60 months, they have a heightened responsibility to ensure that the real-world implications of their associations' stated aims receive careful scrutiny and meaningful refreshment based on their ongoing learning. In addition, fit-for-purpose boards must enable the consistent advancement of these intentions through both their stewardship actions and the continuing work of staff partners and voluntary contributors.

3. How do we impede progress on our expressed intentions?

For fit-for-purpose boards, a vital element of advancing their associations' expressed intentions must be a candid assessment of their own thinking and action. Sadly, far too many boards across our community are either unable or unwilling to recognize how their own behaviors interfere with making sustained progress. To build forward momentum for realizing their most important intentions, fit-for-purpose association boards must reckon with the detrimental impact of orthodox beliefs, i.e., the deep-seated assumptions we make about how the world works, choose long-term action over short-term thinking, and work to set a higher standard of stewardship, governing, and foresight [SGF].

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Jeff De Cagna

4. What systemic problems require our immediate action?

Over the next 60 months and beyond, we will live in a context of more systemic upheaval due to accelerating and amplified turbulence in the social, technological, economic, environmental, and political (STEEP) factors and forces that shape our world. These conditions will require fit-for-purpose association boards to concentrate more of their attention and energy on isolating their organizations' most significant systemic problems and identifying possible solutions. Working in trusted collaboration with staff partners and other contributors to address systemic problems, fit-for-purpose boards must seek out next practices and steward the adoption of emerging technologies in an ethical and responsible manner.

5. How will we retire our association's governing debt?

For decades, associations have deferred hard choices and, in the process, incurred substantial governing debt. As I wrote in 2018, "governing debt is the accrued constraints, disadvantages and obstacles associations encounter due to the failure of their boards over time to prepare for the future." Governing debt is both tangible, including real-world financial, policy-based, or structural limitations to action and intangible, including the surrendering of board agency to orthodox beliefs. Fit-for-purpose association boards accept the absolute necessity to identify opportunities to retire governing debt and protect successors from inheriting the worst consequences of its persistent damage.

6. What will our successors say about us?

This query has been (and will continue to be) the preoccupying question of my professional life, and one that I ask myself every day. I am now formally inviting all fit-for-purpose association board directors/officers, along with their staff partners and other contributors, to join me in asking it of themselves. After all, it will be our long-term successors—human beings who will never be known to us personally—who will render the final judgment on the worthiness of our actions over the next 60 months. This question could have easily topped this list, and I am confident that fit-for-purpose association boards will put it first by their own choice.

There will be no delay in the arrival of the second half of The Turbulent Twenties, and the next 60 months will set the tone for the rest of this century. There is a daunting amount of work for our community to do, and the ultimate outcome of our efforts will remain unclear for some time. Nevertheless, we must begin immediately by insisting that fit-for-purpose association boards make a clear-eyed acceptance of their serious stewardship responsibilities and guide our collective endeavor into the future undaunted.

So Narrow You Can't Breathe

Summary: Professional associations originally thrived by focusing narrowly on specific professions, fostering expertise, community, and knowledge sharing. However, today's challenges demand broader solutions as members seek interdisciplinary skills and impact. Associations must adapt by expanding their scope and forming networks without losing their core focus.

The Origins of Professional Associations

We're all familiar with the associations established on our three pillars: Community, Knowledge, and Convening - but have you ever wondered how your professional association came to be? Those annual conferences, networking events, and industry guidelines didn't just appear out of thin air. Let's take a trip down memory lane and explore how those prototypical volunteers of yesteryear laid the groundwork for today's professional landscape. Picture this: It's the late 18th century, and the Industrial Revolution is in full swing. Cities are growing, jobs are specializing, and professionals are facing new challenges. To some of you who have pioneered new professions, this may feel familiar. That feeling of isolation, of knowing there are others like you out there, the need to connect. So those hard-working practitioners decided to seek out those like themselves, they recognized that by coming together, they could share knowledge, advance their fields, and protect their interests.

The Power of a Narrow Focus

So how did these groups actually form? It wasn't as simple as creating a Facebook event. It started with informal gatherings at the local tavern, and as these meetups gained traction, they evolved into more structured affairs. Soon enough, they were establishing formal organizations. Here's where it gets interesting: these early associations often had a laser-focused approach. They weren't trying to be all things to all people. Instead, they zeroed in on specific professions or specialties. But why so narrow? Well, how else could they stand out in an increasingly complex world? This narrow focus became their secret sauce. It allowed them to define themselves clearly and serve a specific audience of like-minded practitioners. Think about it: if you're a 19th-century surgeon, would you rather join a general health workers group or a cutting-edge group of cutting-edge specialists? (Pun absolutely intended.) They came together to set standards, share the latest techniques, and advocate for their profession. Their focused approach didn't just shape their identity – it helped mold the entire healthcare landscape.

Legacy of Early Associations

The benefits of this narrow approach were numerous. It allowed for targeted professional development – no more sitting through irrelevant presentations. Perhaps most importantly, it helped build public trust in new and growing professions. When you're dealing with specialized knowledge, expertise matters. Of course, it wasn't all smooth sailing. These associations faced their fair share of challenges, but despite these growing pains, the legacy of these early associations lives on. Today's professional organizations owe a lot to these forerunners. They created the template for how we come together, share knowledge, and advance our fields, and by and large narrow work.

The Shift from Specialization to Broad Focus

Fast forward to today – the narrow focus that once defined and strengthened professional associations could now be our Achilles' heel. Professionals are fast being stretched to become multi-disciplined – a challenge to associations to broaden their output, and to members to decide which association fits best. Just as traditional power-house accounting firms were once the place for accountancy, today they are professional services firms that are providing all parts of the financial and technology solution to clients. So what about our associations?

Bio Matty Rubenstein is a seasoned executive-level consultant with 15 years leading staff and volunteer teams, in cross-functional, transformational initiatives for leading global associations. Before entering the association world, Matty spent over 15 years in customer-facing advisory roles in industry blue-chips like HP and EMC, serving technology, finance and insurance clients.

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Membership Challenges in a Changing Landscape

Let's talk about the elephant in the room: membership. Remember when joining your industry's association was a no-brainer? You simply bought into the only game in town – such blue oceans back then – and you got a private network, specialist knowledge and a convention to boot. But these days, it's a harder sell – why is that? There's a few factors at play here: with such a narrow focus it's hard to solve any one problem; with a pool of narrowly focused and experienced volunteers we can only talk to a similar homogeneous group; and, add to that Millennials and Gen Z are more interested in impact rather than knowledge, which they can get from many other places. We often lump all these together and call it a member engagement problem – which really hides the true issues. Don't we have production, market and impact problems? We have tried to address the production problem by producing non-core knowledge in an attempt to fill the broad knowledge gap. We spend lots of money on membership drives through many different means to try and capture a larger slice of an ever shrinking pie, and we scratch our heads and wonder how we'll ever cater to the next generation.

Returning to Our Roots: Addressing Today's Challenges

Let's go back to our roots – what do associations exist for? Go back up to the top of the article and we see: professionals are facing new challenges. Today's associations face the same question as generations ago – What can we do to best empower our practitioners to face those challenges? In the past it was to come together and share knowledge that created the professional and define the profession. In terms of strategy, this was a grassroots, bottom-up push by professionals to establish themselves – and it worked. As associations we empowered professionals to overcome their challenges and establish themselves as the professions we know today – indirect impact. However, that was yesterday's start-up problem – today we have an operational relevance problem – very different beasts.

The Need for Top-Down Influence

Practitioners today face a more complex route to acceptance than yesteryear. Bottom-up is not enough – we also need to support them creating a top-down needs vacuum. That requires new people in our camp that know how to talk to and influence leadership. If as practitioners we do really bring value, then by bringing leadership into our group we can share the value which broadens our production pool. That also brings with it the ability to create content for a broader audience, which broadens our market. And on top of these two, we now have increased our impact.

A New Approach: Association-Networks

As for how we broaden ourselves without diluting our message, perhaps that lies in a new approach – association-networks. I suggest that we learn from our education counterparts' model – majors and minors. Majors – the part of our business to represent our members to whom our specialty is core. Minors – the other part of our business, delivered through sister associations, to members to whom our specialty is peripheral. The major will continue to be the traditional bottom-up push that we have provided to members, and the minor will drive top-down adoption. Likewise, our members will receive their minors, for example in technology, policy and management from our sister associations. In this way we broaden our membership, we broaden our market and we broaden our impact, without losing our razor-sharp edge.

Innovate the Lean Way

Summary: Lean startup methodology, developed by Eric Ries, helps associations innovate efficiently by quickly testing ideas and adapting based on real feedback. It uses tools like the Lean Canvas, the Build-Measure-Learn cycle, and the Pivot to avoid wasted resources and ensure solutions meet audience needs.

Does this sound familiar?

Someone (staff, senior leadership, volunteer leadership) comes up with a great idea for a new program, product, or service. Maybe it was even specifically requested by members. Your team builds it, on time and on budget. The result has lots of features, works easily and the way it's supposed to, and looks terrific to boot. And it flops. No one uses it.

What went wrong?

Maybe you identified the wrong audience. Or something you thought was a real and significant problem or need for them turned out not to be. Or the solution you came up with wasn't something that made sense to them. Or you couldn't offer your solution at a price they were willing to pay. You may have been relying on anecdotal evidence or untested hypotheses. Or maybe your project fell prey to the HIPO (the Highest Income/Influence Person's Opinion). Or some combination of the above.

In short, you invested precious resources working on the wrong thing.

Is there a process that can help associations achieve our missions, stay in business, find problems worth solving, and make a real and meaningful difference for our members and other audiences, achieving the sustainable, dynamic impact we seek?

There is: Lean startup methodology.

What is a Lean Startup?

Lean startup is an innovation system developed by Eric Ries and described in his 2011 book *The Lean Startup*. Ries developed the methodology out of his experiences using lean process improvement, which focuses on reducing waste and defects and working more efficiently and effectively. Ries's key insight?

It doesn't matter how quickly you're moving if you're headed in the wrong direction.

Lean startup methodology relies on a few key concepts designed to make sure you're going the right way AND going there quickly and efficiently:

- The Lean Canvas
- The Build-Measure-Learn Cycle
- The Minimum Viable Product (MVP)
- The Pivot

The Lean Canvas

The goal of lean startup is not to guarantee success with a particular new program, product, or service. Rather, as Ries puts it, "In the modern economy, almost any product that can be imagined can be built. The more pertinent questions are 'Should this product be built?' and 'Can we build a sustainable business around this set of products and services?' To answer those questions, we need a method for systematically breaking down a business plan into its component parts and testing each part empirically." (Ries, *The Lean Startup*, p. 55.)

The Lean Canvas is a one-page business plan tool that allows you to focus the design of your new offering and begin articulating the assumptions that go into it, so you can start testing and validating (or disproving) them. (For an example, see the Lean Foundry.)

Bio For more than 25 years, Elizabeth has helped associations grow in membership, marketing, communications, and especially revenue. She speaks and writes frequently on a variety of topics in association management. When she's not helping associations grow, Elizabeth loves to dance, listen to live music, cook, and garden.

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Elizabeth Weaver Engel

The Build-Measure-Learn Cycle

The build-measure-learn cycle is the core of the methodology.

In lean startup, you **build first**. That means you're trying to get the Minimum Viable Product (that is, the minimum version of the product you can build with the smallest investment of resources and effort that would still be real enough to let you start testing your assumptions) out to your audience as quickly as possible. No theorizing or speculating, no "stealth mode," no working for two years on creating the absolute perfect thing (that you then discover no one wants). You build a prototype and get people using it and offering feedback as quickly as you can and with as small an investment of resources as possible.

Next, you **measure**. You've identified a problem you think might be worth solving, and you have a hypothesis about what the right solution might be. Next you test whether your hypothesis is correct, which requires identifying and tracking "Metrics That Matter," a few key measures that will prove – or disprove – your theory.

That testing leads to **learning**. The only way to reliably answer your questions about audience, problem, and solution is to let people use your product and find out what they think and how they act. That information feeds back to your team so you can get closer to where you should be in your next MVP iteration.

The Pivot

What if, in your testing process, you discover your assumptions about your audience, their problem, or your solution were wrong?

It's time to pivot. A pivot, as defined by Ries, is "a structured course correction designed to test a new fundamental hypothesis about the product, strategy, and engine of growth." (Ries, *The Lean Startup*, p. 149)

Or, in scientific method terms, you've just disproved your original hypothesis. The pivot is the process of returning to test another hypothesis.

Consider Groupon, which started as a platform for mobilizing groups of people toward action for various social causes. Or YouTube, which began as a site for sharing videos for online dating. Or PayPal, originally launched to allow people to transfer money only between Palm Pilots (remember those?). (There are more examples in this article from Mashable.)

These successful companies all got their initial assumptions wrong. They picked the wrong problems. They targeted the wrong audiences, or those audiences did not need or want their proposed solutions. But they all learned from that feedback, adapted, found problems worth solving, and came out with new solutions to those problems. And that may be the most powerful insight this methodology provides.

To quote two of the other key thinkers in lean startup, Nathan Furr and Jeff Dyer: "It's liberating to recognize that no human being can guess correctly when you face uncertainty, and that part of the process is making changes to adjust to these inevitable errors." (Furr and Dyer, *The Innovator's Method*, p. 172)

You are not going to be right all the time. Lean startup methodology recognizes and, indeed, requires that fact and is structured to help you move as quickly and efficiently as possible from "here's an interesting idea" to "here's a program, product, or service that we *know* – because we've been testing it all along the way – our audiences want, need, will use, and will pay for."

To learn more, download your free copy of Innovate the Lean Way: Applying Lean Startup Methodology in the Association Environment.

A Systems Approach to Association Management

Summary: A systems approach to association management views organizations as interconnected systems where all parts influence one another. By fostering collaboration, utilizing feedback loops, and adapting to change, this approach enhances decision-making, problem-solving, and long-term success in dynamic environments.

In these uncertain times, accepting that uncertainty is inevitable is core to an association's success; but so too is understanding that there is always opportunity to shape and control the association's direction, and not merely respond or react to circumstances. Leadership teams must be willing to improvise and recognize that in a world where uncertainty is high, changes of direction may be frequent, and rapid responses may be required. To do so, it is necessary to replace traditional linear approaches to decision-making, and to address the complexities of association management through nonlinear methods that better respond to the dynamics of the association sector, such as a systems approach.

Defining the Association as A System

The systems theory of association management asserts that any organization is a single, unified system of interrelated parts or subsystems. Each part of the overall system is dependent on the others and cannot function optimally without them. Therefore, if factors are present that adversely affect one subsystem within an organization, it is likely that these factors will adversely affect other subsystems, too, resulting in variable impacts on the entire system. For example, a finance team is a subsystem of an association and probably interacts with every other subsystem.

The same principle applies to the marketing team, albeit the nature of its interactions will be different: whereas the finance team will liaise with the IT team to arrange the purchase of software, the marketing team will interact with IT to arrange the use of the software. In this simple example, if the finance team fails to provide IT with sufficient funds to buy the software, then the marketing team cannot fulfil its role because it lacks the software to do so; and if the marketing team cannot reach the association's audience, then the finance team will issue fewer invoices and ultimately have less funds available for future investment.

Thus, whilst their specialist focus may differ, as subsystems of the same association, the finance, IT, and marketing teams are deeply connected, with each relying on the other to ensure the association, as the whole system, functions as it should.

System thinkers recognize that the component parts of a system are best understood in the context of their relationships with each other and with other systems, rather than in isolation. At the heart of the systems approach is the principles of interconnectedness, which relates to the dynamic relationships between various parts of the whole, including the idea of circularity, which stresses the requirement of a mindset shift from linear to circular thinking.

Similarly, the concept of emergence relates to the outcomes of interactions that can come about as the elements of a system interact with each other in nonlinear ways. In the workplace, this often takes the form of the push and pull that happens due to organizational politics and competing priorities, but association systems-thinkers will see these interactions as an opportunity for enhanced collaboration and innovation.

Balancing and reinforcing feedback loops within an association serves to guide adjustments as an association learns more about the interconnectedness of the elements of the system and their outcomes. Additionally, causality refers to the flows of influence between the many interconnected parts within a system, i.e., cause and effect.

As association professionals better understand the causality and directionality of these elements, they will have an improved perspective on the many fundamental parts of the system, including relationships and feedback loops. A skilled association systems-thinker will ensure mechanisms for multiple feedback loops are established and effectively communicated to staff, volunteers, members, suppliers, and/or stakeholders as required. Furthermore, leaders and their teams will understand correlation versus causation as they use the data gathered from the feedback loops to enhance the association's value proposition, as well as internal workplace practices.

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Embedding the Systems Approach Within an Association

By definition, systems thinkers think differently. They are excited by things that other people often cannot see. They will not just look at 'things' in a situation, but at the interactions between things and what happens because of those interactions.

Rather than analysing parts, a systems thinker gains a greater understanding of the elements and dynamics of a situation, enabling a deeper exploration into what obstructs, disrupts, delays, diverts or supports and encourages efforts to make change. They might explore purpose and identity, or interconnections and interdependencies; they might focus on perception, projection, framing and bias, behaviours, assumptions and communication; and they might look at interactions, influences and relationships.

A systems thinker will explore how people in a situation collaborate and reciprocate. They can examine at both a micro and macro level to gain an understanding of both the situation and the context in which the situation is embedded, helping them to understand why a situation and the people in it are or are not able to adapt to their changing environment. By examining how the parts of the whole function together, they can uncover hidden relationships, anticipate unintended consequences and develop more sustainable solutions for their associations.

It is important to remember that staff, volunteers, and members are all part of the system and that for the systems approach to work, everyone needs to understand and engage with that approach. Embedding systems thinking within an association's structures and culture is therefore necessary for the approach to work properly. Leadership must lean into systems thinking, but they must also ensure that the mindset filters throughout the association. They can do so by:

1. Delegating tasks with an explicit requirement on identifying the potential impacts and effects of actions.
2. Considering all perspectives, recognising that every voice plays an important role in influencing the association's system.
3. Using systems thinking to break down silos and cultivate internal collaborations.
4. Coaching leadership teams (including boards and committees) who can be viewed as isolated entities that sometimes overlook their interconnectedness with the larger organizational system.
5. Facilitating change management, using systems thinking to anticipate any ripple effects and unintended consequences and facilitate smoother processes.
6. Streamlining the integration of technology, which is largely understood as one of the most critical areas that would benefit from a systems approach, as reflected in the growing number of vendors offer platforms that fully integrate the whole spectrum of technologies necessary for effective association management, i.e., CRM, event management, financial management, payments, website, member portal, learner management, committee management, communications, fundraising, and reporting.

Contemporary associations operate in ecosystems full of interconnectivity and constant feedback loops. Mapping such complex systems helps association professionals to navigate into adaptive strategies. The ultimate gain is the ability of associations to be responsive to the changes in their ecosystems and to be prepared to fine-tune and quickly adapt parts of their organization as required.

Within this context, the systems approach provides clear benefits to associations: It helps in framing complex problems, which can often be misdiagnosed using traditional linear thinking; it presents alternative options for improvement with respect to the association's internal and external connections; it provides a significant advantage in increasing an association's capacity for change and, therefore, to fulfill the vision of the association.

Although it requires some talent and a deeper understanding of complexity and ambiguity, systems thinking can be successfully introduced and utilized to strengthen associations; and systems thinking and a systems approach to association management can become the foundation for associations' long-term success.

What to Do (and Avoid) to Succeed Globally

Summary: To succeed globally, associations must avoid common pitfalls like random market expansion and domestic-centric approaches. Instead, they should adopt enablers like a clear purpose, intentional market selection, global readiness assessments, and a long-term, phased approach for sustainable international growth.

Domestic associations often expand into foreign markets unintentionally by randomly attracting members and attendees from other parts of the world. Even when international audiences grow over time they're often ignored. Unprepared when approached for requests such as discounts or chapter formation, associations typically make rash, uninformed decisions that create unsustainable models and drain their limited resources.

Bottom line, many associations totally miss the actual value opportunity of international growth. However, when prepared and armed with an informed, proactive strategy, associations can greatly benefit from international activities to diversify their membership, expand their revenue sources, and better serve their profession or industry globally.

For global expansion efforts to be optimal, associations must first and foremost avoid several common pitfalls and be sure to include the following critical enablers for success.

Missing or Misaligned Purpose

While a mission and vision may be in place for an organization's home market, the "why" of international growth can neither be assumed nor be vague. And although global expansion requires a new outlook to consider different opportunities it also shouldn't totally veer off the existing mission.

When the reasons aren't clear nor aligned with the organization's core mission, moving forward with global expansion will likely lead to conflicting expectations, lack of support, inadequate market selection, and the inability to measure impact.

Random Market Expansion

Entering markets based on random requests received (or suggested by a board member) may not match the countries that are best suited for the association to fulfill its stated purpose. Such an approach could waste resources in areas that may prove to be difficult, costly, risky, time consuming, and limited in their potential.

It's difficult to say no when there are no criteria in place to objectively assess the opportunities, guide decisions and priorities. Without a method to evaluate options, organizations are either missing opportunities or selecting the wrong ones.

Low Value Proposition

A membership value proposition, product or service designed for a home market is rarely equally relevant and valued across borders. On the global marketplace, one size does not fit all.

Associations that assume they can simply export their existing offerings will quickly learn that international audiences either respond critically or feel left out. They will question the applicability of content that is excessively home-centric, the accessibility of events held in distant locations and time-zones, and prices that don't consider their income levels. Lack of value is what leads to low international retention rates.

Short-Term Limited Support

Expecting rapid and consistent results is unwise for associations that begin their global expansion. It takes time to understand international markets, adapt according to their needs, and build relationships that are critical to succeed.

The leadership cannot be split on their support, fail to accept the inherent risks of global business, or be reluctant to provide the necessary resources. Failure to commit investments as part of an organization's long-term strategic plan will derail efforts before they have a chance to yield the desired impact.

Domestic-Centric Business as Usual

A typical pitfall and costly mistake is to consider global needs as an afterthought. Internal practices and processes designed for national audiences won't produce the best results.

When associations continue to operate business as usual, they often experience frustrations working across borders. They learn the hard way that transforming or adapting what they produce after the fact for a global audience is far more complicated and costly than designing it with global requirements from the start.

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Bio Sylvia Gonner, CAE, owner of CultureWiz, is an international consultant who supports associations through their global journeys with strategy development, organizational readiness, value propositions, and market penetration models. She's a frequent speaker, fluent in six languages, who trains individuals and teams around the world to effectively work across cultures.

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Clear Informed Purpose

Associations must first determine why they wish to expand into international markets, what goals they wish to accomplish, what's in it for their existing members, and what criteria they will use to measure success.

The process must be informed by data that is well researched across a broad list of stakeholders whose engagement is key to ensure buy-in and future support.

When the reasons for international growth are well defined and prioritized, they set clear expectations that will drive the strategy.

Intentional Market Selection

To identify suitable international markets, associations must start by defining the ideal conditions that should exist in a country to match their stated purpose.

Things like the country's economic and political situation, local regulations related to their profession, and the maturity level of their industry are important indicators.

The absence of established competitors and documented demand are also critical for success. Additionally, because these criteria are not all equally important, deciding how to assess and weigh these is vital to prioritize and drive decisions.

Global Readiness

When associations take the time to consider the global appeal of their value proposition and services, they're better positioned to serve global audiences and expand into foreign markets.

A critical part of a successful global expansion plan is to conduct a global readiness assessment such as the 5As Test for Global Appeal developed by CultureWiz to examine the applicability, accessibility, acceptability, affordability, and adaptability of their offerings. Then, according to the findings, associations can enhance their global readiness and appeal before launching overseas.

Long-Term Phased Approach

A realistic, long-term outlook must be understood and accepted. A phased approach is best to advance step by step towards multi-year goals, while the organization's global readiness is gradually enhanced, and resources are allocated to support the efforts.

Through phases, results can be measured in relation to the actual efforts it took, and plans can be adjusted based on lessons learned and new opportunities that arise.

Whether supported by internal staff and/or external sources, global business requires dedicated support as well as leadership's full endorsement.

Global Operating Model and Mindset

Associations that operate with a global mindset consider everything with a global lens from the start. Their culture encourages an inclusive approach that prioritizes international needs and requirements when developing new programs and initiatives and when selecting new systems and vendors.

Global competency training is available for staff and volunteers to adopt the mindset and build the habits needed to lead and sustain this transformation. When guided by new processes and supported by motivated change agents, a global operating model replaces the previous domestic-centric one.

Bottom line

Global growth into international markets can offer associations many rewards as long they avoid some of the common pitfalls that will derail their efforts. Instead, they must proactively adopt proven enablers of success such as a clear purpose to guide them, an intentional market selection method, global readiness assessments, and a long-term, phased approach that will facilitate the development of an effective and sustainable global operating model.

Merger and Acquisition Considerations

Summary: When considering a merger or acquisition (M&A), associations must assess strategic alignment, governance, cost implications, and cultural challenges. Mergers often involve one organization dissolving, requiring emotional intelligence. M&A can offer growth but demands expert guidance, patience, and careful planning to ensure success.

A wave of association mergers and acquisitions (M&A) is coming.

Recent activity, from the combination of three associations into the Australian Business Events Association and PCMA's acquisitions of the Event Leadership Institute and Event Marketing Association UK, is just the tip of the iceberg. Research by Wipli LLC found that nearly 80% of surveyed association leaders are at least somewhat likely to consider consolidating or merging with another organization in the next two to five years.

While the prospect of M&A can be exciting, it is not for every organisation. How can you know if M&A is right for your association? Here are seven considerations for association leaders thinking about M&A.

> ...nearly 80% of surveyed association leaders are at least somewhat likely to consider consolidating or merging with another organization in the next two to five years...

Know Your Why

From new market entry and revenue diversification to greater advocacy impact and pure altruism, there are many reasons to pursue M&A. But whatever the reason, it must be strategic. Associations often struggle when their M&A motivations stray from the same mission alignment and advancement criteria that they apply to developing new programmes, events, and more.

Mergers and Acquisitions are *Very* Different

There are very few association mergers of equals. It is more common for one association to acquire the assets of another association that then dissolves. This creates volunteer governance challenges. Why? It requires one association board to put itself out of business. Emotions can run high, which can cause a single point of deal failure. These situations require high emotional intelligence to build the trusting relationships and navigate the delicate conversations necessary.

Associations acquiring for-profit entities more closely mirror private-sector transactions. While there are legal intricacies to navigate, deal terms are often more clear-cut: purchase price, post-deal employment contracts, non-compete agreements, and more. These acquisitions can be costly but tend to be more straightforward and easier to close.

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Unique Skills are Required…

M&A requires specialised legal counsel, due diligence support, accounting services, and strategic guidance. Unfortunately, few associations have staff executives and board members with M&A deal making experience. If your association does not, hiring outside experts is critical for both negotiating the best deal and protecting the organisation from taking on unnecessary risk.

…and so is Patience

Associations are inherently risk averse, which can lengthen the M&A timeline. There are many examples of association mergers taking multiple years to finalize. Within this context, consider whether M&A *clearly* and *significantly* advances your association's mission. If not, joint ventures and partnerships might be better options. They are also easier to exit if not successful.

Governance Determines Success and Failure

Boards of directors ultimately control the fate of M&A deals. That's why association leaders must work in lockstep with their board throughout the process. It is vital that neither side gets too far out in front of the other. As previously noted, these transactions can be emotional for board members and often involve sensitive conversations. Leading with empathy and humility is key.

A predefined process for when and how to engage the board is also recommended. This ensures clear expectations for everyone involved. A stage-gate process with various commitments along the way often works best. This way, the board is engaged at the right times without overdoing it.

Finally, M&A involves difficult questions that only boards can answer. Who will lead a merged association? What will the composition of a merged board of directors be? How will acquisition payments be structured? It is important to get these questions answered early on. Sometimes the answers shut down discussions, which saves time heartache down the line.

Merger and Acquisitions are Costly

M&A is rarely a cost-savings measure. From the financial outlays required to complete a deal to the investment required for integration and growth—including change management, operational integration, branding, and more—the full spectrum of M&A costs must be factored in up front. While there may be post-transaction efficiencies, these should not be a driver of M&A interest.

Cross-border Deals are Complex

Intra-country M&A is challenging, but international transactions add further complexity. From legal and regulatory compliance to financial and tax considerations, the implications of cross-border M&A should be explored before any outreach begins. In addition, there are significant cultural aspects to international M&A. These range from how deals are negotiated in hierarchical vs. consensus-driven cultures to crafting a post-M&A culture that supports a global workforce.

While every merger and acquisition is different, these seven factors can help inform associations as they consider the possibilities. When done right, M&A can help drive growth, increase synergies, and create a unified voice for associations that increases member value and social impact. Will your association surf the wave of association M&A coming in the years ahead?

Associations: Collectively Driving Sustainable Impact

Summary: Associations play a critical role in addressing environmental, social, and economic sustainability challenges by uniting stakeholders, driving collaborative initiatives, and advocating for impactful policies. Their collective efforts in promoting sustainable practices, education, and economic empowerment contribute significantly to a more equitable and sustainable future.

The term “collectively driving sustainable impact” refers to a membership organization’s active role in leading, facilitating, and coordinating collaborative efforts among its diverse stakeholders to address complex societal issues to achieve shared sustainability goals. By leveraging their convening power, expertise, and influence, associations can foster partnerships, mobilize resources, and catalyze action towards a more sustainable and equitable future for all.

At this time when sustainability is no longer just a buzzword but a necessity, associations across the globe are stepping up to collectively drive sustainable impact. These groups, uniting various stakeholders, have recognized that by working together, they can create lasting positive effects on the environment, society, economy and governance. This article explores how associations are making significant strides in these four critical areas.

Environmental Impact

The environmental challenges we face today, from climate change to biodiversity loss, require concerted efforts that transcend individual actions. Associations play a pivotal role in this context by pooling resources, knowledge, and influence to tackle environmental issues more effectively.

Collaborative conservation efforts: Associations often bring together diverse organizations, including NGOs, businesses, and government agencies, to collaborate on conservation projects. These partnerships can lead to the establishment of protected areas, restoration of habitats, and preservation of endangered species. For instance, the collaboration between the World Wildlife Fund (WWF) and various local and international partners has led to significant successes in wildlife conservation and habitat restoration.

Sustainable practices and standards: Many associations develop and promote industry-wide standards and practices that encourage sustainability. For example, the Global Reporting Initiative (GRI) provides a comprehensive framework for companies to report their environmental impacts, fostering transparency and accountability.

Advocacy and policy influence: Associations have the collective power to influence environmental policies and regulations. By uniting their voices, they can advocate for stronger environmental protections and sustainable practices. The Climate Action Network (CAN), a worldwide network of over 1,900 civil society organizations in over 130 countries, is a prime example of how collective advocacy can drive policy changes at international climate negotiations.

Social Impact

Associations also play a crucial role in driving social impact, addressing issues such as inequality, education, health, and community development. Their collective efforts can lead to substantial improvements in social well-being.

Educational initiatives: Associations often spearhead educational programs and initiatives that benefit communities. For example, the International Association for Impact Assessment (IAIA) provides training and resources to professionals worldwide, enhancing their capacity to assess and manage social impacts effectively.

Community development: Associations work on various community development projects, from building infrastructure to providing essential services. The Rotary International, through its numerous local chapters, undertakes projects that improve water sanitation, promote maternal and child health, and support education and literacy.

Social advocacy: By mobilizing their members, associations can advocate for social justice and equality. Organizations like Amnesty International and Human Rights Watch rely on the collective power of their members to campaign against human rights abuses and promote social justice globally.

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Economic Impact

The economic dimension of sustainability is equally important, as associations strive to create resilient economies that can sustain long-term growth while addressing social and environmental challenges.

Economic empowerment: Associations often focus on empowering communities economically. For instance, microfinance associations provide financial services to underserved populations, enabling them to start businesses and improve their livelihoods. The Microfinance Network, global association of leading microfinance practitioners, has been instrumental in lifting millions out of poverty.

Sustainable business practices: Many industry associations promote sustainable business practices among their members. The International Chamber of Commerce (ICC), for instance, advocates for corporate responsibility and sustainability, encouraging businesses to adopt practices that are economically-viable and environmentally-sound.

Innovation and research: Associations often facilitate research and innovation that drive sustainable economic growth. The Association for the Advancement of Sustainability in Higher Education (AASHE) supports research and initiatives that integrate sustainability into higher education, fostering innovation and preparing future leaders to address sustainability challenges.

Governance Impact

Good governance is essential for sustainable development. Associations influence governance by promoting transparency, accountability, and ethical practices.

Corporate governance: The Institute of Corporate Directors (ICD) in the Philippines promotes good governance practices among corporations. By providing training and resources, they enhance corporate accountability and transparency.

Policy advocacy: The Business for Social Responsibility (BSR) network advocates for policies that promote sustainable business practices. Their collective influence helps shape regulations that encourage ethical and responsible business conduct.

Ethical standards: Associations such as Transparency International work to combat corruption and promote ethical standards globally. By uniting members against corruption, they strengthen governance frameworks and enhance public trust.

Existing and emerging global ESG

Existing and emerging global ESG (environmental, social, and governance) issues will significantly influence large associations working with major partners or large member organizations. ESG concerns are increasingly shaping policies, consumer behavior, investment trends, and regulations. Below are some possible strategic actions for associations in this regard:

ESG integration*:* Associations will need to integrate ESG principles into their core operations, offering guidance and tools for members to align with new regulations and investor expectations.

Educational programs*:* Associations will need to provide workshops and training on specific ESG issues, from carbon reduction strategies to responsible AI usage.

Partnerships and collaboration*:* By fostering collaborations between businesses, governments, and non-profits, associations can facilitate innovation in sustainability and social impact.

Policy advocacy*:* Associations should act as advocates for balanced and feasible ESG policies at national and international levels to ensure that the interests of their members are represented.

Conclusion

The collective efforts of associations are indispensable in driving sustainable impact across environmental, social, economic and governance dimensions. By bringing together diverse stakeholders, fostering collaboration, and leveraging their collective influence, associations are uniquely positioned to address the complex challenges of sustainability. Their work not only leads to immediate benefits but also paves the way for a more sustainable and equitable future. As we continue to navigate the pressing issues of our time, the role of associations in collectively driving sustainable impact will remain crucial, reminding us that together, we can achieve far more than we ever could alone.

Navigating Organizational Transformation for Successful Global Expansion

Summary: Organizational transformation is essential for successful global expansion, requiring adaptive leadership, cultural sensitivity, and strategic frameworks like CARE and MATCH. Effective change management, community engagement, and investment in local talent ensure agility, resilience, and long-term sustainability in diverse international environments.

In today's rapidly evolving global marketplace, organizational transformation is not just a strategic advantage—it is a necessity. The challenges of global expansion require a nuanced approach to change management, ensuring that organizations are agile, resilient, and capable of thriving in diverse international environments. Successfully navigating this transformation can determine whether an organization flourishes or flounders on the global stage.

The Imperative of Organizational Transformation

As organizations set their sights on global markets, they encounter a complex web of cultural, regulatory, and operational challenges. Transformation becomes essential to adapt to these new realities. This involves more than just scaling operations; it requires a fundamental rethinking of how the organization functions, communicates, and delivers value.

Understanding the drivers behind the change is the first step. These can include market opportunities, competitive pressures, technological advancements, and shifts in consumer behavior. Aligning these drivers with the organization's mission and goals ensures that transformation efforts are strategic and sustainable.

Building a compelling case for change is foundational. Leaders must clearly articulate why the change is necessary, what benefits it will bring, and how it aligns with the organization's vision. This shared sense of purpose and urgency helps garner widespread support.

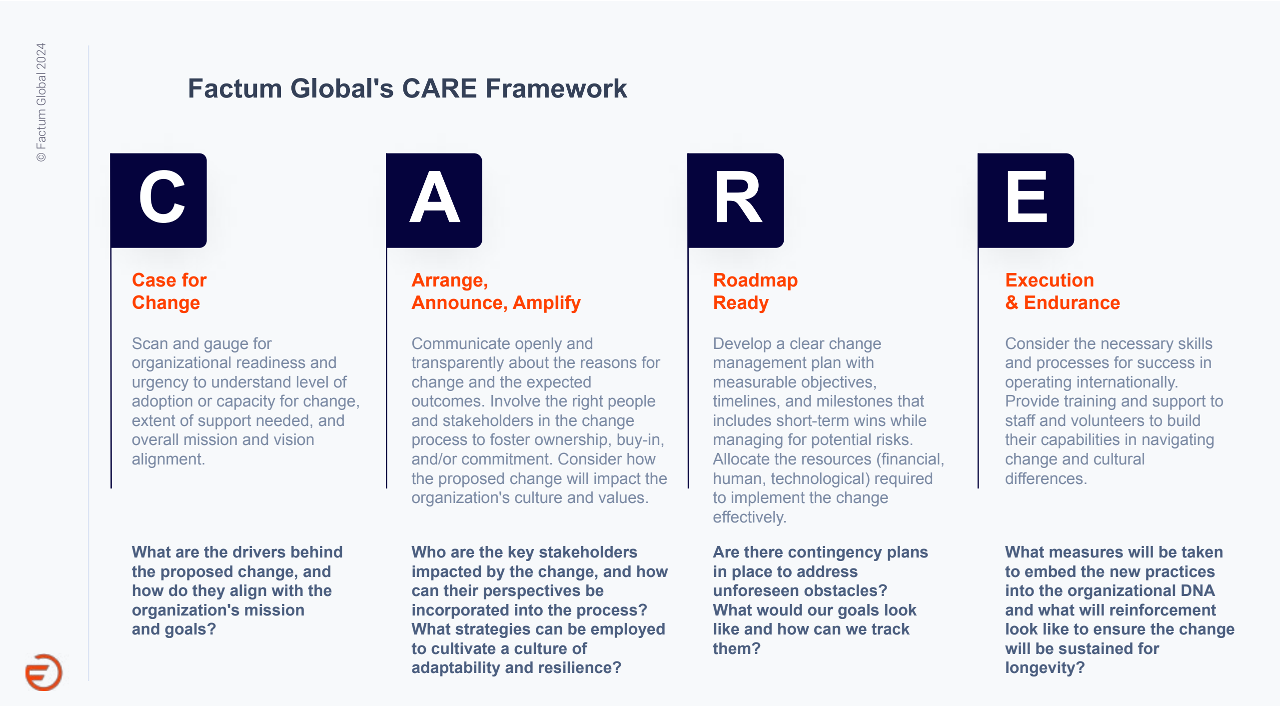
Leadership plays a pivotal role in navigating organizational transformation. Effective leaders inspire trust, drive engagement, and foster a culture of adaptability and resilience. Adaptive leadership, which is flexible and responsive to local needs and cultural nuances, is essential for global expansion. Empowering local leaders to tailor strategies to their contexts, while maintaining alignment with overarching goals, ensures effective operations across diverse regions.

Transparent and Inclusive Communication

Open and transparent communication is vital during times of change. Establishing clear channels for dialogue and feedback helps build trust and inclusivity. Multilingual communication strategies and the use of interpreters or translators can ensure that messages are understood across different cultural settings. Regular updates and opportunities for feedback keep everyone informed and engaged.

Engaging stakeholders and building strong partnerships are crucial. Collaborating with local organizations, community leaders, and grassroots initiatives can provide invaluable insights and support. Co-creating solutions with these stakeholders ensures that the organization's efforts are culturally relevant and sustainable.

Human capital is the cornerstone of any successful transformation. Investing in capacity-building initiatives, providing training, and offering mentorship opportunities empower local stakeholders and communities. This not only enhances organizational capabilities but also fosters self-reliance and long-term sustainability. Respecting and integrating local knowledge and expertise can lead to innovative solutions and stronger community ties.



Strategic Frameworks for Managing Change

At Factum Global, we have developed strategic frameworks like CARE and MATCH to guide organizations through the complexities of change and global expansion. These frameworks address key aspects of transformation in a structured way:

CARE Framework

Case for Change: Establishing the need and urgency for change.

Arrange, Announce, Amplify: Developing and communicating a strategic plan.

Roadmap Ready: Preparing a detailed roadmap with clear milestones.

Execution and Endurance: Ensuring effective implementation and sustainability.

The CARE framework helps organizations scan and gauge their readiness for change, develop clear and measurable change management plans, allocate necessary resources, and execute with endurance.

MATCH Framework

Mission Alignment and Cultural Sensitivity: Ensuring alignment with local values and fostering cultural sensitivity.

Adaptive Leadership: Cultivating flexibility and responsiveness.

Transparent Communication: Promoting open dialogue and inclusivity.

Community Engagement and Partnership: Building strong local collaborations.

Human Capital, Capacity Building, and Empowerment: Investing in local talent and sustainable development.

The MATCH framework emphasizes mission alignment, adaptive leadership, transparent communication, community engagement, and human capital investment, ensuring that the organization can navigate cultural differences and build sustainable partnerships.

Bio Francisco Gomez, founder and CEO of Factum Global, specializes in strategy development and global expansion for companies and nonprofits. He previously led global strategy at the American Chemical Society and consulted at G&G Consulting. Francisco holds an MBA from American University and is fluent in Spanish and Portuguese.

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A Case Study: Global Health-Related Association

Consider the case of a global healthcare nonprofit association dedicated to improving health for people worldwide. When it decided to expand its operations to Southeast Asia, it faced significant challenges, including diverse cultural contexts, varying health regulations, and resource constraints.

Application of the CARE Framework

Case for Change: The association identified a growing need for improved healthcare in Southeast Asia, aligning this opportunity with its mission. The urgency was communicated effectively, highlighting the potential benefits and alignment with organizational goals.

Arrange, Announce, Amplify: It developed a strategic plan with clear objectives, timelines, and milestones. The management allocated resources, including financial, human, and technological, to ensure successful implementation. Early wins, such as the establishment of pilot health programs, were celebrated and communicated to stakeholders to maintain momentum.

Roadmap Ready: The association prepared a detailed roadmap, outlining necessary skills and processes for international operations. They provided extensive training to staff and volunteers to build their capabilities in managing change and cultural differences.

Execution and Endurance: It executed the plan effectively, continuously monitoring progress and adjusting strategies as needed. They developed contingency plans to address unforeseen obstacles and regularly reviewed practices to ensure sustainability.

Application of the MATCH Framework

Mission Alignment and Cultural Sensitivity: The healthcare association ensured that their mission aligned with local values by conducting cultural sensitivity training for staff and engaging local health experts. This fostered a cohesive and inclusive environment.

Adaptive Leadership: It cultivated adaptive leadership by empowering local leaders to tailor health programs to their contexts, while maintaining alignment with its overarching goals. This flexibility and responsiveness were critical to their success.

Transparent Communication: The association established open channels for dialogue and feedback, using multilingual communication strategies to ensure clarity and inclusivity. Regular updates and feedback loops kept everyone informed and engaged.

Community Engagement and Partnership: It collaborated with local organizations, community leaders, and grassroots initiatives, co-creating solutions that were culturally relevant and sustainable. This stakeholder engagement was foundational to their success.

Human Capital, Capacity Building, and Empowerment: The association invested in capacity-building initiatives, providing training, resources, and mentorship to empower local stakeholders. This investment in human capital enhanced organizational capabilities and fostered long-term sustainability.

Navigating organizational transformation for global expansion is a multifaceted challenge that requires strategic vision, adaptive leadership, and robust stakeholder engagement. By understanding the drivers of change, building a compelling case, fostering adaptive leadership, and investing in human capital, organizations can successfully manage transformation and thrive in the global marketplace.

The CARE and MATCH frameworks offer valuable guidance, but the true essence of successful transformation lies in the organization's ability to make quick informed decisions, adapt, communicate, and collaborate effectively across diverse cultural contexts. Embracing these principles can help organizations not only expand their reach but also create a lasting, positive impact worldwide. For more information about Factum Global, please visit www.factumglobal.com.

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Board Preparedness—A Strategic Imperative for Association Success

Summary: Effective board preparedness is crucial for associations' success. It involves early engagement, comprehensive orientation, officer-specific onboarding, and ongoing involvement of returning members. Aligning individual and collective readiness ensures strong governance, strategic direction, and enhances board collaboration for long-term organizational growth.

In today's rapidly evolving nonprofit sector, effective governance hinges on the preparedness of an association's board of directors. The ability of new and returning board members to step into their roles with confidence and clarity is crucial for the strategic direction of any organization. A recent study of nearly three dozen organizations and their approach to board orientation highlighted the need for key strategies to ensure that board members are not just ready to lead from day one but are also equipped to drive the organization's mission forward.

The Importance of Board Preparedness

Board preparedness is not a one-time event; it is an ongoing process that begins long before a new director's first board meeting and continues throughout their tenure. Associations that prioritize this preparedness recognize that effective governance is built on a foundation of knowledge, strategic insight, and cultural alignment. By investing in thorough orientation processes, associations can harness the potential of new board members, ensuring that they are not only familiar with the organization's mission and strategic priorities but are also deeply engaged and ready to contribute meaningfully.

Transitioning from Board Orientation to FOCUs

For most associations, preparing a Board has traditionally simply been called 'orientation' and has consisted of sharing a PDF handout or a brief video training. These approaches continue to result in leaders who feel it takes months to get 'up to speed' in their service. Instead, associations that are seeking to provide a comprehensive training so their leaders are more likely to be ready on day one are taking a four-step approach:

- Foundation
- Orientation
- Confirmation
- Unification

Or what we are referring to as Board FOCUs.

1. Foundation: Laying the Groundwork: Early Engagement

This first stage is designed for individual preparation for any that are running for the Board.

The journey to effective board service begins well before the formal election process. Early engagement with potential board members, even during the nomination phase, can provide them with a foundational understanding of their roles, the organization's mission, and its strategic framework. This pre-orientation engagement allows potential leaders to make informed decisions about their commitment to the board and ensures they are ready to hit the ground running. During this phase an organization can conduct activities that would better prepare anyone that ends up in leadership – whether in the current or a future election cycle.

Leadership pipeline development is a key component of this early engagement. By involving potential leaders in councils, committees, or programs, like the Bay Area Apartment Association's Leadership Lyceum, associations can begin cultivating effective governance practices early on. These experiences not only prepare future board members for their roles but also align them with the organization's culture and strategic imperatives.

2. Orientation: Comprehensive Orientation for New Members

This second stage is designed for individual preparation for those elected to the Board.

Once a new board member is elected, the orientation process becomes the linchpin of their transition from prospective leader to active contributor. A well-structured orientation program should cover a wide range of topics, including nonprofit governance fundamentals, the organization's history and milestones, strategic priorities, and the operational aspects of board service.

Critical to this stage is not just transmitting information but incorporating practical examples and personal support. This could include new Board members that are elected early enough to sit in and experience a full Board meeting before they serve. A Board-match system can pair an incoming and more senior Board member for mentorship.

Tailoring the orientation to the specific needs of the organization and the incoming board members is essential. For example, the American Speech-Language-Hearing Association (ASHA) employs a comprehensive orientation process that includes multiple touchpoints before the first board meeting, ensuring that new directors are fully prepared for their responsibilities.

The ultimate goal of orientation is to equip new board members with the knowledge and confidence they need to actively participate in discussions, advance relationships with their peers, and fully embrace their commitment to the association's mission from day one.

(Bonus Orientation) Onboarding Officers: A Specialized Approach

The onboarding of officers, particularly those who will serve on the Executive Committee, requires a more specialized approach. These roles, which often include the Chair, Chair Elect, Treasurer, and Secretary, are critical to the strategic leadership of the association. As such, their onboarding should focus on the specific nuances and demands of each role.

For example, the onboarding process for the Chair and Chair Elect should emphasize leadership skills, strategic visioning, and stakeholder engagement. Meanwhile, the Treasurer's onboarding should concentrate on financial stewardship, budget oversight, and financial reporting, ensuring that they are well-equipped to guide the board's fiscal responsibilities.

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3. Confirmation: Engaging Returning Board Members

This third stage is designed for individual preparation for returning Board members.

Board preparedness does not end with new members. Engaging returning board members in the orientation and ongoing education process is equally important. These seasoned directors bring invaluable experience and organizational memory to the table, which can be leveraged to enhance the orientation of new directors and reinforce their own governance capabilities.

Even returning Board members can be well served with a refresher session on the fiduciary duties of service, ensuring the mitigation of legal risk. Additionally, there is the opportunity to build in a reflection process where returning Board members can note where their experience has excelled and where there is opportunity for shift for greater strength for the future.

As mentioned above, associations can involve returning board members in the orientation process through mentorship and buddy systems, where experienced directors are paired with new members to provide guidance and advice. Additionally, returning members should take on the responsibility of, overall, welcoming new Board members and ensuring that they feel included.

4. Unification: Building a Board into a Team

This fourth stage is designed for group preparation of the Board.

Every time you have a new Board member, you have a new Board as a whole. Whereas individuals can prepare their knowledge and skills for service, the true potential of a Board to serve as excellence relies not on any one individual, but on how they function together. Therefore, if an organization is going to invest resources in bringing people together to be better prepared for service, this is the stage where that is most worth it.

In the stage of unification, the organization is looking to create unique experiences that are best aligned to collective learning, leadership development, and team building. This may include an exploration and discussion of what values guide the leadership of the organization, confirming behaviors that are to be expected. Many organizations will also explore the many avenues where they need Board members to be champions of mission and purpose, customizing those options to the strength of each Board member. Of course, time is also well spent in relationship building activities, growing trust between Board members.

The most powerful set of activities to populate this stage are simulations. These are mock-examples of certain situations where the Board may find themselves throughout the year where, through a 45-60 minute run through of each, they can get some practice on how to function with one another. This could be as simple as how to approach a critical dialogue and decision in a Board meeting to a foresight dialogue to an innovation session to addressing a crisis moment. These experiences can build a real baseline understanding of how the leaders can best function with one another.

A New Paradigm of Board Preparedness

In conclusion, board preparedness is a strategic imperative that requires deliberate and ongoing effort. By engaging potential leaders early, providing comprehensive orientation for new members, tailoring onboarding for officers, and involving returning members in continuous learning, associations can build a board that is not only ready to lead from day one but is also primed to envision and shape the future.

As associations continue to navigate the complexities of governance in an ever-changing landscape, the practices outlined in this article offer a framework for ensuring that their boards are prepared to fulfill their vital roles in driving organizational success.

If you would like to learn more about the full research conducted as well as review a few dozen examples of approaches to Board preparedness, you can review the full report from Vista Cova here: www.vistacova.com/library.

Beyond Governance: How Boards Can Create Value Strategically

Summary: Boards can create value by balancing oversight with foresight using the DLMA framework: Directorship, Leadership, Management, and Assurance. This approach allows boards to focus on both value protection and creation, enabling strategic thinking, innovation, and collaboration with executives for long-term growth.

In a recent survey by McKinsey, only half of 2,500 global business leaders felt ready for the future. How can your board help your organisation adapt, find new opportunities for growth, and add value?

Board members recognise the need for strategy to navigate change, yet they often don't contribute comprehensively to strategic direction. This isn't due to a lack of willingness but rather a system of governance practices that points them in the opposite direction.

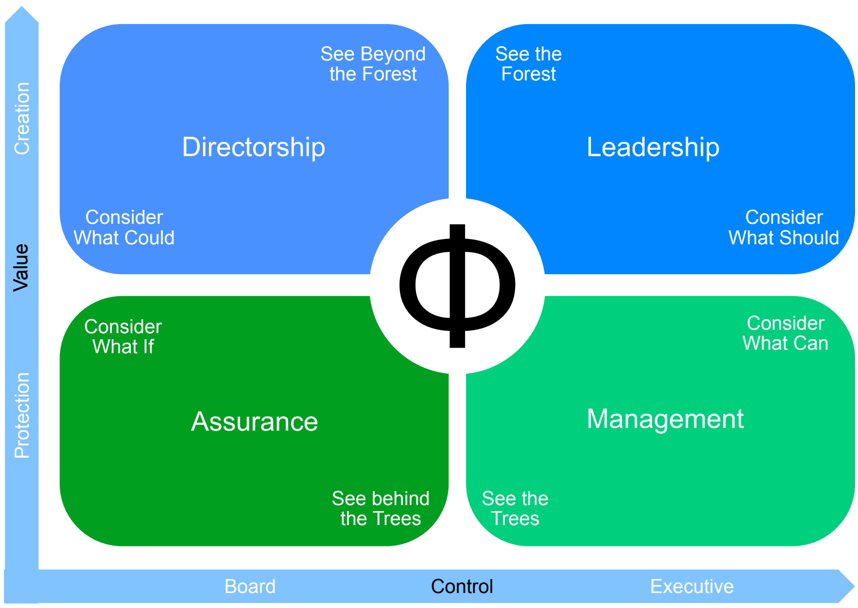
The heavy emphasis on "duties prescribed by law" in board education, "best-practice" and regulatory guidance focuses board members on activities that hinder value creation, such as compliance, policy enforcement, and monitoring. These tasks, which aim to preserve the status quo, prioritise protecting what already exists rather than creating what might be. For many boards, governance has been reduced to compliance.

This narrow focus on practices like proper structures, oversight, policies and procedures (a.k.a as protection or keeping the CEO "safe") prevents boards from creating value.

Visionary board leadership (directorship) is vital to remaining relevant in a dynamic environment. Effective boards don't limit themselves only to auditing the past and present, ticking the boxes and setting risk appetites. They light the way to the future.

Boards must learn to balance oversight with foresight and supervision with vision. They should protect existing value through diligent Assurance while catalysing new value through Directorship. The boardroom door must open to the entire rainbow of governance activities: diligence and vision, scrutiny and trust, stewardship and daring.

When board members deeply understand their role, they can move beyond simple value protection to actively creating it to value creation. Models like DLMA Analysis by Peter Tunjic articulate the full spectrum of board work, demonstrating how boards can balance the tension between protecting and creating value while complementing management's role.



What is DLMA Analysis?

DLMA is a way to analyse the four systems of action needed to run an organisation.

- ***D***irectorship,
- ***L***eadership,
- ***M***anagement and
- ***A***ssurance.

DLMA is deceptive in its 2 x 2 Matrix simplicity, but it is a powerful framework to help board members to gain a practical understanding of what boards "do". It is a tool to create shared insight about your board and how it can add value to the organisation.

Think of DLMA in a similar manner to Edward de Bono's thinking hats. Hats that board members or management put on at different times. Each part of DLMA frames what board members need to be doing, telling us the specific type of thinking needed for a particular area. At the same time it shows us how the board's unique roles compliment the role of the executive.

DLMA applies to organisations of all sizes, but it is very useful for small organisations where the same people often take on all the roles in DLMA. Where they are switching between roles to keep the organisation moving forward, DLMA helps show when you need to make that switch.

Balancing all four parts of DLMA generates value, represented in the model by the Greek letter Phi. Note that the value is not only monetary value, it is a broader kind of value including social, natural, cultural or any other of the nine types of capital4.

Directorship (D) = Board + Value Creation

The board's role when wearing the Directorship hat is to think beyond what is and what has been, to look to the horizon and ask "what could be?". To imagine new possibilities for the organisation's future. This where directors bring to bear imagination, creative analysis and strategic thinking.

- Boards that lead.
- ask "what could be?"
- The focus is beyond the forest.

Leadership (L) = Executive + Value Creation

Executives who lead focus on creating value by asking "what should or will be?" and looking at the big picture forest rather than the trees. True leadership involves executing a vision to create value.

- Executives that lead
- ask "what should or will be?"
- The focus is on the forest.

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Management (M) = Executive + Value Protection

When executives are managing, the focus is on protecting existing value by asking "what to do?". Effective management involves executing tasks to maintain and protect current assets and operations. Taking what comes from Directorship "what could be?" and translating it into concrete goals, plans and operations (management) - asking "what to do?"

- Executives that manage
- ask "what to do?"
- The focus is on the trees.

Assurance (A) = Board + Value Protection

Here the board focuses on risk and compliance. Seeking the hidden surprises that lurk behind the trees. This is an activity that many board members consider to be governance. Boards should not spend all their time here, they should aim to spend more time in Directorship.

- Boards that govern.
- ask "what if?"
- The focus is on what's hiding behind the trees.

Combining DLMA Hats

The simple nature of the model gives board members an easy way to ask questions to improve their board. Such as "Is our board creating value or protecting value?" and "Is that the right activity, right now to help the organisation flourish?"

Exploring the different pairings in DLMA shows the nuances of the board-executive relationship.

Directorship X Assurance

When boards combine the Directorship focus of "what could be?" with the Assurance focus on "what if?", they create a holistic view that safeguards existing value and explores future possibilities.

Directorship X Leadership

Where Directorship and Leadership intersect, boards and executives can shift their focus upward. Moving from the immediate challenges of today to a longer term horizon by asking "what could be?" and "what should be?". This shapes the organisation's purpose and its strategic goals for the future.

Directorship X Management

Here the board and executive balance long-term vision with immediate operational needs. Connecting the strategic thinking of the Directorship quadrant to the Management quarant's tactical mindset. Considering "what could be?" and "what to do?", thereby balancing long-term vision with immediate operational needs to achieve it.

Leadership X Management

This is how we enable executives to turn their vision of "what should or will be?" into actionable steps that protect and grow value. Executives bring together Leadership (big-picture thinking) with Management (attention to detail).

Leadership X Assurance

Combining Leadership's vision of "what should or will be?" with Assurance's cautionary question of "what if?" allows for a well-rounded strategy that both anticipates the future and mitigates risks.

Assurance X Management

Here the board and executive can focus on the potential risks of the operational details. Blending Assurance ("what if?") with Management ("what to do?") is where the board and executive align to protect value together.

The Bottom Line

Don't become trapped in governance as compliance. DLMA provides a framework for the partnership between the board and executive. It highlights the different "hats" board members wear, giving us a framework to think clearly about the doing of being a board member. Allowing a synergy to drive strategy, innovation and growth. While also putting guardrails and accountability in place. Use the different roles of DLMA to help your board to be strategic about how it protects and creates value.

Unmasking Cyber Threats: Why Association Leaders Cannot Afford to Overlook Cyber Insurance

Summary: Cyber threats pose a serious risk to associations, making cyber insurance a critical safeguard. It provides financial protection and access to expert resources, helping associations manage incidents effectively. Alongside proactive cybersecurity measures, cyber insurance enhances resilience, protecting both operations and reputations.

In today's digital landscape, cyber threats are a critical risk that associations must navigate. Data breaches, ransomware, and phishing attacks are on the rise, disrupting operations, compromising sensitive member information, and tarnishing reputations. For associations, it's not a matter of *if* but *when* a cyber event will occur.

Despite the risks, many association leaders still underestimate the importance of cyber insurance. This article explores why cyber insurance is a must-have for associations and how it goes beyond mere payouts, using a compelling case study comparing an uninsured association with one that has robust cyber coverage.

The Case for Cyber Insurance: A Tale of Two Associations

Consider two associations: *Association A* and *Association B*. Both manage large volumes of sensitive member data, including payment details and personal information.

Association A experienced a ransomware attack after an employee inadvertently clicked on a phishing email. With no cyber insurance in place, the association faced significant challenges: engaging external IT consultants at a high cost, communicating with members about the breach, and dealing with regulatory bodies. In addition, legal fees, public relations efforts, and weeks of lost productivity added to the financial burden. The total cost exceeded $500,000, and the association's reputation among members and industry partners was severely damaged.

In contrast, *Association B* faced a similar ransomware attack but had a robust cyber insurance policy in place. The policy covered the costs of incident response, including IT forensics, legal advice, and even the ransom payment. But the real value lay in the additional support provided by the insurer. The association had access to a 24/7 cyber incident response team and a data breach coach, helping them mitigate the damage quickly and communicate effectively with stakeholders. Ongoing monitoring and PR costs were also covered, ensuring that their reputation remained intact. Despite the challenges, *Association B* emerged with minimal disruption and financial loss, thanks to their cyber insurance.

Beyond the Payout: The Hidden Benefits of Cyber Insurance for Associations

Cyber insurance is more than just financial compensation in a claim. For associations, which often operate under tight budgets and with limited in-house IT expertise, these policies can provide critical resources and support to enhance cyber risk management.

1. Access to Experts

Cyber insurance provides access to IT forensics, legal advisors, and crisis management teams, all covered by the policy. This immediate support can drastically reduce the impact of an attack and expedite recovery. Leading insurers even offer access to these experts before a claim arises, helping organisations improve their risk management.

2. Tailored Risk Reports

Top insurers offer customised risk reports and analysis—not just generic industry reports, but insights specifically tailored to your organisation. These reports, often included at no additional cost, provide valuable information to help associations understand and mitigate their key risks.

3. Risk Management Tools

Many insurers now provide mobile apps featuring data dashboards for monitoring risks, managing incident responses, and offering cybersecurity training for staff. These tools help associations stay ahead of threats and foster a culture of proactive cyber risk management. All of this is included in the annual premium, eliminating the need for a big budget to enhance cyber hygiene.

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Cyber Insurance: Just One Piece of the Puzzle

While cyber insurance is a crucial part of an association's broader cyber risk management plan, it's not a substitute for good cyber hygiene. Associations should adopt a proactive approach to cybersecurity by implementing strong policies and practices, such as:

1. Education and Training

Regularly train staff and members on cybersecurity best practices to minimise the risk of human error.

2. Technology Controls

Implement multi-factor authentication and backup protocols, and invest in firewalls, anti-virus software, and encryption technologies to protect the organisation's digital operations and sensitive data.

3. Incident Response Planning

Develop and regularly update a cyber incident response plan to ensure a swift and coordinated response to any breach.

Revisiting Directors' Duties: Cybersecurity as a Governance Issue

Directors play a crucial role in overseeing risk management within their organisations. This includes cyber risks, where they have a duty to ensure their associations are adequately protected against potential threats. This responsibility includes understanding the association's cybersecurity posture, advocating for necessary resources, and ensuring that appropriate cyber insurance is in place. Neglecting these duties can lead to significant legal and financial repercussions for both the association and its board members.

Building Cyber Resilience: Steps for Associations

Cyber threats are a growing concern for associations, with the potential to cause significant financial and reputational damage. By investing in a robust cyber insurance policy and implementing proactive risk management strategies, associations can not only protect themselves from immediate harm but also build resilience against future threats. Association leaders must recognise the importance of these measures as part of their broader risk management and governance responsibilities, ensuring their organisations are well-prepared to face the digital challenges ahead.

“Be Less You”: The Perils of Inauthentic Leadership

Summary: Inauthentic leadership can hinder success, as advice to conform often pushes individuals away from their true selves. Embracing authenticity, rather than following misguided advice, leads to more meaningful connections and effective leadership. Success lies in staying true to oneself, not conforming.

Rising through the ranks of association management comes with numerous opportunities to participate in events, volunteer on committees, join professional communities, and partake in learning and leadership courses.

Along the way, a lot of people want to give a lot of advice. While most advice is well-meaning, much of the advice provided along the way focuses on changing yourself to fit whatever is deemed to be “normal.” While I want to believe that the intention behind this advice is to provide guidance on how to be successful, if I were to have taken all of the advice I have received I do not think I would be in the same position I am today.

What I have learned from my experience is that even bad advice can be helpful in determining your personal brand, leadership style, and career aspirations.

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Wear More Makeup to Be Taken Seriously

Working environments, unfortunately, still put emphasis on outward appearance in determining success and suitability. The number of times I have been told to wear makeup to be successful or be taken seriously are too numerous to count at this point. Instead of trying to fit into a mold I am not made for and spending more time worrying about how to purchase and apply makeup correctly, I redirected these efforts into professional development and building my network of trusted advocates who could speak for me in rooms I was not in and help me to build reputation and credibility without the focus on physical appearance.

Learn to Play Golf

While women have broken through many glass ceilings and barriers, some organizations still have an "old-school" way of operating. One piece of advice that I will never forget is being told to learn to play golf so I could be in places where decisions were being made. While I could have learned to play golf, I knew I would look like a fool doing this and would not be the best representation of myself. I never did learn to play golf, but what I took from this is that I do not want to be part of an organization that makes decisions in secret and that if I am ever to be in a position of organizational leadership someday, values I will not compromise on include transparency, collaboration, and ensuring equitable decision-making.

Be More Extroverted

There have been numerous articles about introverts as leaders, including several from the Harvard Business Review such as this podcast and this article, that note the power of introversion in positions of leadership. Despite this, the introverts in the room are often told to be more extroverted and to make sure to go to all of the parties and perhaps even told to have a few drinks to "loosen up" and "have a good time" and "make friends." Being who we are as introverts and coming to the room as ourselves with our own clear-minded observations is a much more useful tactic for success. I tried the advice of "being more extroverted" and all it did was make me tired and unable to be my best self. I am very happy to say that embracing introversion and being selective about the events I attend has led me to more meaningful connections and conversations with colleagues and members which have, in turn, built trusted networks and successful outcomes.

Be Less You

A professional colleague once told me that I was "too excited" about my work and "people don't like that." When I asked what they meant, they suggested "be less you." Although this happened years ago, I still think about this conversation on a regular basis, and I still have not figured out how to be less of myself, I have figured out how to effectively contribute my voice to conversations and forge my own path.

In the end, despite all of this seemingly bad advice, what I really learned is that in order to be successful one must be authentic. The best leaders I know and people I look up to in my career journey are ones who are truly themselves and do not pretend to be someone they are not. While there are various qualities of good leaders, the one that keeps rising to the top is authenticity. Afterall, how can you be a successful leader if you are not being you? When receiving advice, you cannot control what people say to you, but you can control what you do with the information and how you show up as your authentic self.

The Authentic Association: A New Paradigm for Mental Health in Association Leadership

Summary: To maximise mental health and leadership potential, association leaders should embrace authenticity by defining their highest values and aligning actions accordingly. This clarity boosts brain function, resilience, and self-worth. Inspire your team to do the same for a thriving, authentic association.

The one thing I'd like you to remember from this article is this: Define your authenticity. If you want maximise your mental health and leadership capacities - get clear on who you are and what truly inspires you. If you want to bring out the very best in your staff, members, sponsors, and the industry you serve - help them define who they are and their most inspired vision, too. Self-knowledge and self-worth is key to maximising well-being and human potential, and this idea is central to the authentic association.

The Brain Chemistry of Purpose

On a brain chemistry level, when an individual is clear on what is most meaningful for them, and they are clear on how their work contributes to the world, and they are doing something about it each day, blood, glucose and oxygen travel from the subcortical regions of the brain (the amygdala) into the prefrontal cortex (the executive center).

When that happens, instead of reacting to external events you'll have greater self-governance. Instead of feeling stuck in the 'flight or fight' state, and feeling like life is happening to you, you'll feel empowered and capable of rising to the challenge. If you're experiencing burnout, feelings of inadequacy, anxiety or depression, getting clear on who you are and what you're all about, does wonders.

An inspired vision, written down, grounded in reality, plus a clear definition of who you are and what your highest priority in life is, causes the neurons in the brain to be coated in brain goop called myelination, which makes signals travel more efficiently through the brain, enhancing your ability to manage challenging situations, bounce-back from setbacks, and stabilise mental well-being. The brain is a purpose seeking organ. It works best when the purpose and identity of its owner is crystal clear.

Authentic leadership is often thought to be a leadership style that emphasises genuineness, transparency, and ethical behaviour. Authentic leaders are true to themselves and lead with integrity, building trust and loyalty with others. I'm not disagreeing with that. Instead, I want to enhance what we know about authentic leadership and raise the roof of self-worth in associations.

Demartini's Definition of Authenticity

This article explores the research of Dr. John Demartini, human behaviour expert and the Aristotle of our time. Over 50 years, he has studied 300 academic fields and has developed a cutting-edge paradigm for thinking and leadership with application for every area of life. Promise. If you want the advantage as an association leader, do yourself a favour and start listening to his profound insights.

Demartini defines authenticity as the alignment with one's highest values and priorities, resulting in increased self-worth. When we see how our daily actions contribute to those values, we light up. If you've ever met me in person at an association event, you'll know just how inspired I am to share this information because I believe it will revolutionise leadership and enhance mental health within associations, and the world.

The Hierarchy of Values

Core to Demartini's philosophy is the hierarchy of values. He says, every individual has a set of priorities, unique and blue-print specific to them. It's a list each person carries around in their mind each day. A list of things that are most meaningful and important to the least. This list of values determines what we do and don't see in the world, how we think, and how we behave. Demartini says, our values determine our destiny.

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For example, a person with a high value on finances will naturally look for ways to increase profits, reduce costs, save, invest, and organise a budget. In other words, they appreciate money and what it can do. A person who has a high priority on physical health will organise their life around exercise, rest, and nutrition. If a person does not value finances or health as much as say socialising or raising a family, they won't be looking for the same type of opportunities, nor as inspired to pursue them as someone who does.

A major challenge, as pointed out by Demartini, is that when a person is attempting to inject the values of someone else, they will not see challenges as opportunities to be triumphed over. Instead they will be less inspired to act, they will require more micro-managing and external motivation, and will take more sick days, and most likely engage in more bitching and moaning about life. This is the effect of someone who is living an inauthentic existence.

Living Authentically vs. Inauthentically

Additionally, people can become confused about whose values are running around inside their brain. Often people think they know who they are and what their true values are, but on closer look, both in ourselves and others, we often find an operating system trying to run in accordance with the values from outside authority figures, real or imagined. If you look closely, you may find that your most fundamental ways of seeing and acting in the world are based on one-sided perceptions and half made-up stories about those authority figures. This causes you to look up to, infatuate and exaggerate the importance of other individuals and think they know better, or that they have something you don't, and that their life is put together. Opposite to this, you may minimise and look down on others, viewing yourself as better than them in some way, such as intellectually, physical beauty, equally because you have created mental alliances with outside authorities and what they hold important. Both perceptions move you away from the authentic self.

As a result, people perceive the world through the eyes of unrealistic expectations of themselves, others and mother nature. This friction of values causes internal conflict, stress, worry, exaggerated and polarised emotions of resentment, guilt, shame, pride, infatuation, phobias (fears) and philia (imaginations and fantasies) about life. This internal friction of values, says Demartini, is the root cause of many of the mental health issues we face today.

For the leader who is run by the opinions and politics on the outside, stress will build up. For the leader who listens to their heart and is run by an inspiring vision, they are poised on the inside, despite what happens around them. When a person is clear on their highest values, their identity clarifies too. They become their most authentic self and self worth comes online. The leader who is aware of their values and vision, is less likely to judge others in exaggerated or minimised ways, or as Demartini says, put people on pedestals or in pits. They are more likely to operate through the eyes of appreciation, gratitude, patience, objectivity and love for others and themselves, despite perceived weaknesses and strengths.

Embracing the Full Spectrum of Authenticity

Inauthenticity is not the opposite of authenticity. What that means is that authenticity is not all positive and peachy, and it is not all self-less and pure. Authenticity is an appreciation that life is filled with challenges and support, positives and negatives, ups and down.

If you resent someone or some event, it is because you perceive more negatives than positives. If you infatuate with someone or some event, it is because you perceive more positives than negatives. However, all events and individuals are neutral until someone's value hierarchy places meaning over it, called subjective bias. From the subatomic to the astronomical, there is a balance of positives and negatives, the same can be said about our daily lives, our psychology and behaviour. We cannot get rid of one side of life and expect only support, positives and happiness.

To maximise your mental health and leadership potential, embrace authenticity by defining your highest values and aligning your actions with them. This clarity enhances brain function, self-worth, and resilience. Start today by reflecting on what truly inspires you, and encourage others to do the same for a thriving association. Begin defining your authenticity and inspire your team to do the same for improved mental health and leadership within your organisation, and you will create The Authentic Association.

Hear and Now: How Listening Amplifies Association Leadership

Summary: Listening is crucial for effective leadership, fostering stronger relationships and better decision-making. By practicing mindful listening, leaders can overcome distractions, biases, and emotional reactivity, ultimately improving team dynamics, member engagement, and trust. Listening well transforms leadership, creating more connected and empathetic environments.

We live in a moment where so much vies for our attention—the next ping from our devices, that urgent email, another knock on the door. This overstimulation can chase us through our days, rushing us through our interactions, listening only for what we think we need. In the face of all that shouting, it's tempting to limit our intake and shut out the noise. This can lead to limited impact and poor decisions. We need to listen, and to listen well.

Why Listen?

Listening is crucial to building and maintaining strong relationships. And just like any other skill, listening can be refined and improved over time. Association leaders in particular can greatly enhance their effectiveness by listening more deliberately. In a world where polarisation and constant noise—both literal and metaphorical—drown out meaningful communication, leaders must ask themselves: What would leadership look like if we were more conscious in our listening?

The Neurobiology of Listening

Have you ever thought much about how listening works? Most of us just take it for granted, assuming that listening is an automatic process that enables us to collect the information we need. Listening is not just a passive act; it's a whole-body experience involving the ears, brain, and nervous system. Neuroscience reveals how we process sounds, emotions, and verbal cues, showing that deep listening activates specific areas of the brain responsible for empathy, understanding, and connection. When we listen attentively, we engage various brain regions, including those that foster empathy and logical reasoning. One of the key elements of listening is the activation of mirror neurons—brain cells that fire both when we perform an action and when we observe someone else performing the same action. These neurons are crucial for empathy, allowing us to resonate with another person's emotional state and experiences, creating connection and understanding.

Consider This

The leadership team of an industry association, eager to lead in innovation, launched a new initiative focused on the latest technological advancements. They were confident it would attract new members and position the association at the forefront of the industry. However, a group of experienced members, particularly those from smaller, less-resourced organisations, felt their immediate challenges—like navigating regulatory changes and managing staff burnout—were being ignored. One member, Tom, took it upon himself to gather feedback and present it to the leadership, but his concerns were brushed aside in favour of the tech agenda. Despite the fanfare, the initiative fell flat. Engagement was low, and many members felt alienated. As membership renewals began to decline, it became clear that the leadership's failure to listen had created a rift. By prioritising their vision over the voices of their members, they had not only missed the mark but also eroded the trust that had taken years to build.

Had the leaders listened to hear and connect they could have avoided this outcome. Even the most well-intentioned leaders can fall into common listening traps.

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Bio Liana Busoli has extensive experience in psychotherapy, trauma recovery, training, and executive coaching. Liana specialises in guiding association leaders through complex organisational challenges with a focus on emotional intelligence, trauma informed practices, and effective communication strategies. Her approach integrates research with practical, actionable insights, empowering leaders to create emotionally healthy teams.

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Obstacles to Listening

Distractions, biases, and emotional reactions often get in the way of fully engaging with the speaker. Interrupting or talking over the speaker, formulating counterarguments while the other person is speaking, and selective listening all get in the way. Emotional reactivity, such as feeling attacked or criticised, can also lead to defensive listening, where we focus more on protecting our position than truly understanding the other person's perspective.

Open-Minded Conversations

To overcome these barriers, leaders can learn to stay open-minded. This involves recognising triggers that lead to defensive listening, pausing before responding, and shifting the mindset from one of winning or losing to one of understanding and learning. Engaging in reflective listening—summarising or paraphrasing what the speaker has said—can help shift the focus from reacting to engaging meaningfully with the content. Practising curiosity and embracing discomfort are also key strategies for maintaining an open mind during challenging conversations.

Emotional Regulation

Effective listening requires emotional regulation. Leaders can use techniques like mindfulness, grounding exercises, and self-awareness to manage their emotional responses and stay present in conversations. By regulating their emotions, leaders can listen more effectively, fostering a more connected and supportive environment.

How Listening Impacts on Team Dynamics and Leadership

Integrating the cognitive and emotional aspects of listening allows leaders to make more informed and balanced decisions, considering both the facts and the human elements involved. Regular practice of mindful and empathetic listening can also build resilience within teams, helping them navigate stress and challenges more effectively.

Mindful Listening in Practice

To implement mindful listening, leaders can follow a simple process:

1. **Preparation:** Centre yourself before entering a conversation.
2. **Presence:** Focus fully on the speaker, avoiding multitasking.
3. **Reflection:** Summarise and reflect back what was heard.
4. **Response:** Respond thoughtfully, engaging with what has been said.

This mindful listening process can be applied in various contexts, from meetings to one-on-one discussions, enhancing communication and connection within the organisation.

The Transformative Power of Listening

Listening is a powerful tool that holds the potential to transform leadership, improve team dynamics, and enhance member engagement. In a world full of shouting and polarisation, the simple act of listening may be the key to bringing people together and fostering more effective leadership. Association leaders are urged to take a step back from the noise and make a conscious effort to listen more deeply and mindfully. By doing so, they not only improve their leadership effectiveness but also contribute to creating a more connected and understanding world.

Creating a Communication Mindset

Summary: Developing a communication mindset enhances clarity, trust, and collaboration. By prioritising strategic thinking, empathy, active listening, and self-awareness, leaders can foster better relationships and reduce misunderstandings. This mindset improves leadership, boosts confidence, and ultimately strengthens organisational success and member engagement.

Richard Branson said communication is the most important skill any leader can possess. It's about more than merely conveying information, it's about connecting with others in a meaningful way, so you educate, motivate and inspire.

When we lead with a communication mindset, we prioritise comprehension, clarity and connection in every interaction. We understand how to ask, listen and observe and our people feel aligned, valued and understood.

And as an association professional, it's important to remember that everything we say or do communicates something to somebody somewhere.

And ultimately, how you communicate is determined by your mindset.

Your mindset consists of your attitudes and beliefs. If your inclination is to withhold information, if you are motivated by a desire for control or power, and if you prefer to work independently rather than risk information leaks, chances are you are operating from a place of secrecy.

On the other hand, if you're focused on enhancing your work through curiosity, building relationships, and fostering collaboration, you're well on your way to having a communication mindset.

Leaders with a communication mindset are more likely to create change, energise their workforce, members and sector, and achieve greater results.

Organisations – and leaders – with a communication mindset consider how, what, when and where they communicate for each activity undertaken. Communication is at the centre of all they do.

Why is having a communication mindset important?

In today's fast-paced world, where digital communication and AI is often overshadowing in-person interactions, having a communication mindset is more critical than ever. The benefits include:

1. Your members will trust you more

Associations are increasingly based on relationships, and relationships are born from communication and connection. A communication mindset fosters trust and understanding because it comes from a place of people first.

2. Greater collaboration

When everyone in a team adopts a communication mindset, collaboration becomes smoother, as ideas are exchanged more openly and effectively. Furthermore, when an association has a mindset of communication, it will be invited to collaborate more, leading to opportunities for members and other stakeholders.

3. Reduces misunderstandings

Miscommunications can lead to conflicts, mistakes, and missed opportunities. A communication mindset helps minimise these risks by ensuring that messages are conveyed and received as intended.

4. Improves leadership

Leaders with a communication mindset are better equipped to inspire and motivate their teams, making them more effective in their roles.

5. Boosts confidence

When you approach communication with intention and clarity, you become more confident in your interactions, whether you're speaking to a colleague, member, partner, or larger audience.

6. A better bottom line

Poor communication costs associations a lot of money. On average, workers waste almost an entire day every week because of inefficient communication and substandard collaboration. Poor communication and secrecy can also lead to increased reputational risk, loss of credibility and trust, loss of morale and staff feeling unvalued, reduced innovation and delayed or failed projects.

Bio Mel Kettle is an internationally recognised expert at fully connected leadership and communication. With more than two decades of experience in strategic communication and leadership, Mel is a valuable asset to leaders and teams that want to achieve real connection and sustained engagement. She is the host of podcast *This Connected Life* and the bestselling author of *Fully Connected* (Use code ASSOCIATION to save 20%) and *The Social Association.*

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Mel Kettle

Seven ways to develop a communication mindset

1. Prioritise time for strategy

Good communicators prioritise time for strategic thinking and planning and working through what and how they need to communicate so they meet the needs of their audience. Yes, it can be hard to find time to be proactive, for deep work and strategic thinking, but it's a critical part of having a communication mindset. Not taking the time to plan and prioritise, leads to increased stress and anxiety, which can lead to overwhelm and miscommunication.

2. Communicate with heart

When we communicate with heart, we focus on our people. We demonstrate empathy, vulnerability, generosity, and a willingness to listen.

3. Share your expertise not your ego

People driven by ego, can come across as cocky or arrogant. While you need a little bit of ego (like you need a little bit of oxygen to create a flame) you don't want it to be raging! Many people who lead from a place of ego also have a secrecy mindset as they want all the control and power. They also harm collaboration, innovation and motivation with their strong need to always be right. Instead, share your knowledge and expertise by speaking up, writing a blog, guesting on podcasts, sharing your thoughts on LinkedIn and your intranet.

4. Become more self-aware

Self-awareness leads to greater confidence, as well as an understanding of how others might perceive our communication style. Take time to reflect on what your behaviour is telling others about you.

5. Practice active listening

Listening is as important as speaking. Focus on truly understanding what the other person is saying before formulating your response. Ask clarifying questions and reflect on what you've heard to ensure you're on the same page.

6. Observe behaviours and be mindful of nonverbal cues

Communication about more than words. Pay attention to your body language, facial expressions, and tone of voice, as these can significantly impact how your message is received.

7. Be curious, ask questions and seek feedback:

Curiosity leads to a greater understanding of others, and fosters a culture of continuous improvement and growth. Asking questions and exploring different perspectives, shows an interest in others, making them feel like they belong, and it can empower others to share their ideas and insights, knowing that their input is valued. And when we seek feedback with a view to grow, we can obtain valuable insights into areas where we can improve.

A communication mindset is not just a skill—it's a strategic approach that can transform your professional and personal interactions. By prioritising clarity, empathy, and adaptability, you can build stronger relationships, reduce misunderstandings, and enhance your overall effectiveness as a communicator. Start by practicing the tips outlined above, and watch as your communication skills evolve into one of your most valuable assets.

Harnessing Storytelling and Collaboration for Transformative Leadership

Summary: In association management, leaders can foster deeper connections and drive innovation by integrating storytelling and collaboration. Storytelling builds trust and aligns members with the association's mission, while collaboration encourages diverse perspectives and innovation. Together, these strategies create dynamic, resilient organisations.

In the rapidly changing landscape of association management, staying ahead of trends and embracing new ideas are critical for sustained success. Associations are facing unprecedented challenges, from member disengagement to competition from online communities and evolving technologies. In this environment, leaders must adapt quickly and focus on strategies that foster deeper connections and drive innovation.

One powerful approach for leaders wanting to drive change is the integration of storytelling and collaboration among industry leaders. By using these tools, associations can build stronger relationships with their members, inspire action, and create a culture of shared purpose and innovation. This method not only fosters deeper connections but also drives innovation and growth, making it a trend worth adopting.

Storytelling: A Strategic Tool for Connection and Engagement

Storytelling has emerged as a vital tool for leaders looking to connect with their audiences on a more profound level, especially in the unique, mission-driven world of associations. Unlike many industries where transactions dominate, associations thrive on uniting members around shared goals and values. Storytelling in this context goes beyond traditional communication by transforming abstract concepts into relatable narratives that resonate deeply with members' experiences and emotions. It's not just about conveying information; it's about building trust, inspiring action, and fostering a sense of belonging and shared purpose.

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Bio Angela Shelton, CEO of Answers for Associations, is a passionate advocate for uniting association professionals through innovative events and fostering meaningful connections. As Managing Editor of the Associations Evolve Journal and co-host of the Association HUB Podcast, she is dedicated to celebrating and supporting leaders who drive positive change in the association sector.

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Leaders who effectively use storytelling can highlight both the successes and challenges of their organisations, creating narratives that reflect the unique journey of their association. These stories inspire members to see themselves as vital parts of the mission, driving greater involvement and loyalty. By weaving these narratives into the fabric of their communications, leaders can align and motivate their teams, fostering a stronger, more connected community that thrives on shared vision and collective action.

Collaboration: Driving Innovation Through Shared Leadership

In the association world, collaboration is more than just a buzzword—it's the key to unlocking real innovation. When you bring leaders together to share experiences and brainstorm solutions, you create a space where transformative ideas can truly flourish. This isn't just a trend; it's a powerful shift toward collective leadership, where the blending of diverse perspectives leads to creative and effective outcomes.

Imagine stepping outside your industry and engaging with leaders from other sectors. You'll likely discover surprising similarities and shared challenges, sparking new ideas you might not have considered before. Whether through roundtable discussions, peer mentoring, or industry forums, these conversations are opportunities to tap into a wealth of knowledge and expertise. By embracing this collaborative approach, you're not just addressing current challenges—you're preparing your organisation to navigate future trends with agility and confidence.

Collaboration empowers you to think differently, connect more deeply, and innovate more effectively. It's about working together to shape the future, and in doing so, you'll find that you're not just keeping up with change—you're leading it.

Practical Insights for Adopting These Trends

For readers looking to incorporate storytelling and collaboration into their leadership strategies, consider the following practical steps:

1. Storytelling Integration

Begin by identifying key stories within your organisation that illustrate your mission, challenges, and successes. Share these stories regularly through internal communications, industry publications, or social media to inspire and engage your audience.

2. Facilitating Collaboration

Create opportunities for yourself to regularly connect and collaborate with peers. This could involve joining virtual roundtables, attending industry forums, or simply setting up informal discussions where you can talk about trends, share insights, and work through challenges together. By actively participating in these exchanges, you'll foster an environment of open dialogue and idea-sharing. Once you've experienced the benefits, consider creating similar opportunities for your team, helping to build a culture of continuous learning and innovation within your organisation.

3. Leveraging Networks

Use your professional networks to amplify the impact of your stories and collaborative efforts. Engaging with a broader audience can help disseminate best practices and drive industry-wide change.

As you navigate the evolving landscape of associations, blending storytelling with collaboration offers a clear path to transformative leadership. By adopting these strategies, you'll not only stay ahead of the curve but also help create more connected, innovative, and resilient organisations. This approach ensures that your organisation—and the industry as a whole—remains dynamic, responsive, and ready to meet future challenges and opportunities.

Incorporating these insights into your leadership practice will enhance your organisation's effectiveness and contribute to the broader growth and advancement of the association sector.

The Practical Application of Ethics in the Nonprofit Organization Environment

Summary: Ethics are essential for nonprofits, requiring leaders to model transparency, trust, and ethical behavior. While unethical conduct can lead to distrust and retaliation, ethical decision-making fosters trust and accountability. Nonprofits must prioritize ethics to maintain public trust and achieve long-term success.

"When citizens can associate only in certain cases, they regard association as a rare and singular process, and they hardly think of it. When you allow them to associate freely in everything, they end up seeing in association the universal and, so to speak, unique means that men can use to attain the various ends that they propose. The art of association then becomes, . . ., the mother science; everyone studies it and applies it."

This quote by Alexis de Tocqueville, author of *Democracy in America*, is one of the founding principles related to the birth of what we now call associations. While de Tocqueville is often misquoted as saying "America's strength is in its groups," the true spirit of his observation is the strength of ASSOCIATION.

Association in this context is not just for membership organizations like professional societies or trade associations – it applies to all nonprofit organizations

Due to our unique role in society, we should be held to a higher standard of behavior. Our existence is based on the special role we play in the world -- we do work that helps others rise rather than focusing on profits.

Unethical Behavior in Nonprofits: A Growing Concern

Despite our unique role in the world, which should inspire good and ethical behavior, there is story after story of bad and unethical behavior by senior leadership and board members. Staff feel they can't speak up and there are countless tales of bad bosses that intimidate and hold back those that do try to speak up. Too often, people working at these organizations become discouraged and they don't think their behavior will make a difference. Why bother if you will just be punished?

The Rising Challenge of Workplace Misconduct

The Ethics and Compliance Initiative conducts regular surveys of the workplace, and the trends are heading in the wrong direction in the post-COVID lockdown world.

Findings from this survey include:

1. Employees under pressure to compromise workplace standards or the law.
2. Workplace misconduct is at an all-time high.
3. Retaliation against employees reporting misconduct continues at unacceptable rates.
4. Few employees say they work in an ethical workplace culture.

We might feel as an individual that there is not much that we can do to make the workplace better, but you can make a difference by choosing to model ethical behavior for others. This is not always comfortable and sometimes it may seem more trouble than it's worth due to the repercussions that can occur like missing out on opportunities due to retaliation, or even harassment and intimidation.

You likely ask yourself: Does it even matter what I do? Should I try? Can I even make a difference?

It does matter and it does make a difference.

Even if you don't think you are being successful in creating change at your organization, and you eventually leave, your choices have set an example that could inspire others to be more ethical or to learn more about ethical decision making.

Knowing and understanding ethics and why they are important in every aspect of our lives, leads us to self-knowledge and empathy for others. Ethics is the way to understand ourselves and what we want to put into the world**.** This leads to the development of an ethical mindset, and over time, we develop self-awareness. Whether consciously or not, we usually know when we are doing something wrong.

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Perception Matters

There are situations where people think they are doing the right thing because it is “approved” or “legal” but then they are surprised or offended when others make accusations of wrongdoing, unethical behavior, or even worse, self-serving behavior.

We all know that perception is reality, and that’s why Ethics are crucial to support successful outcomes. Even if what you are doing is ethical, if it doesn’t look that way to the outside world, and more importantly, to the smaller circle of your teammates, board leadership, and member community, it doesn’t matter. If you fail to communicate clearly and transparently the motivations and intentions of your actions, you have already lost no matter how ethical you believe yourself and your actions to be.

Why Ethical Leadership Matters

Ethical leadership starts at the top. If leaders are not behaving ethically, they cannot expect their teams to behave ethically. This is why ethics are a necessity for Chief Staff Executives (CSEs) at nonprofits of all kinds, but I will make the argument it is even more vital in a membership association.

Why? Because the CSE of a membership association does not just report to the Board – they are also accountable to the full membership. When members get angry or frustrated about something, then that tells me there is poor communication and poor relationship management which leads to accusations of unethical behavior.

If the members perceive the CSE as unethical, self-serving, and engaging in retaliation, it doesn’t matter if it’s not true**.** Why? Because the members believe it, which means the CSE has not done a good job building confidence and trust across the member community. At that point, it doesn’t matter if the CSE has the support of the Board because the Board needs the support of the membership. Ethics require both trust and transparency to be effective. Otherwise, all you have are pretty words.

How to Practice Ethical Decision Making

We can minimize situations where perceptions are negative by practicing better ethical decision making.. When we evaluate ethical decisions, it is very much a strategic decision-making process:

- What is the situation?
- Do I have enough information?
- Is it my responsibility?
- Am I in a position to do something or make change?
- What am I willing to risk?
- Is this an environment where action can be taken?

Building an Ethical Culture in Nonprofits

Ethics can be applied daily in all we do but we must have the courage of our convictions to take ethical action. When it comes to nonprofits and the work they do, ethics are not a nicety; they are a necessity.

Bridging the Divide: Building Cross-Functional Teams For Success

Summary: Building cross-functional teams in associations requires proactive management, clear communication, and fostering collaboration across departments. Success is achieved by setting a shared vision, embracing diverse perspectives, establishing transparent processes, encouraging innovation, and regularly assessing progress to ensure ongoing effectiveness.

One of the hallmarks of effective leadership is the ability to guide people with different expertise, personalities, and conflicting priorities towards a common goal. In an association, this can be challenging as departments often work in silos; each with their own culture, KPIs and way of doing things. Bridging these gaps is key to creating a collaborative environment which leads to better designed, launched and maintained projects, creative innovations, enhanced member experiences, and more commercial success.

Where to start

The first step is recognising that collaboration across teams requires proactive management. Establishing a new cross-functional team without planning how it will be managed, will not set it up for success.

Navigating department dynamics

Different departments often have their own identities and stereotypes of others: marketing might be seen as “creative”, full of ideas but lacking in practicality, while finance might be the rigid and risk averse “numbers people”. These perceptions can create tension, as departments become protective of their ways of working.

This mindset is not uncommon in associations where structures are often more complex and less hierarchical than in traditional businesses. Departments often operate with a high degree of autonomy and have long-serving staff, which can result in a lack of cohesion.

A vision for collaboration

It is vital to establish, and keep at the forefront, the importance of the work at hand, or the vision for the outcome. Setting a clear and compelling vision needs discussion and consideration from all participants.

Encourage all members of the team to share why the success of the project is important to them and why they need it to succeed. The leader of the group can then refer to these points, as needed, to remind everyone of the project’s purpose.

Design the team

It might seem obvious to include department managers in a project team, but choosing emerging leaders, or even new starters, could create a new and interesting dynamic. It may also increase engagement and uncover new ideas.

Meet the team

People need to have the opportunity to get to know each other. Often, we’re thrust into meetings with people whose roles we don’t understand and pressures we can’t fully appreciate. To build empathy, trust and openness, we need to get to know each other.

At kick off – ideally face-to-face – leaders should allow each person to properly introduce themselves, sharing their role, experience, and expectations with the group.

Set the rules upfront – explicitly

Different departments have their own ways of working with varying expectations and preferences.

For cross-functional team success, it is crucial to establish and explicitly communicate the ‘rules’. These could include how the group will meet, who will take notes, acceptable turnaround times, and the principle that everyone at the table is equal.

It’s also important to set guidelines around listening to each other’s perspectives and to appreciate the different skills and expertise that each department brings.

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Bio A strategic communicator, Felicity has worked with over 400 organisations across corporate, associations, government and multinationals. She excels in change management and internal communications, working closely with executive teams and Boards to drive change and growth. Founded in 2007, ZADRO brings to life the power of integrated communications and branding.

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Learning to love change

Resistance to change and subsequent conflict is to be expected, especially in associations where people are used to working in a certain way.

Sometimes resistance stems from fear – fear of losing control, the unknown, or fear of failure. Acknowledging these fears and addressing them proactively can help ease the transition. Ask questions such as "This is a big change for you and your team, how do you think it will be received?" This gives people a chance to express their concerns and for the group to acknowledge and address them.

Conflict is another inevitable challenge. We need to expect disagreements and encourage a problem-solving mindset that focuses on finding solutions rather than assigning blame. In these situations, it's helpful to use a framework to evaluate new ideas and refer to the shared purpose: "Let's attack the challenge, not each other".

The admin side of things

Three basic issues can be the most frustrating part of working with new people or teams: how information is shared (who knows what, when), document management (where is the work?), and deadline compliance (you said it would be ready at 4pm).

Transparency, which in turn breeds trust, is one of the key foundations for successful cross-functional teams. To achieve this, establish clear communication and process guidelines from the outset.

First, agree on how updates will be communicated across the group. Whether it's a dedicated Teams channel, a scheduled email, or weekly meetings, etc.

Next, agree on project management and document usage. What templates will be used? Where will documents be stored? Does everyone have access to these files?

Finally, establish clear rules around deadlines. Are you expected to delegate when you're not available or on leave? What are the consequences of missing deadlines?

When processes are clearly defined, transparent and agreed upon from the start, it saves a lot of angst and misunderstandings.

Innovation and experimentation

Why bring a diverse group of people together in the first place? The benefit is the potential for innovation and diversity of thought. When people with different perspectives collaborate, they can develop creative solutions that no single department could generate on their own. However, to fully harness this creativity, we must foster an environment where experimentation is encouraged and valued. Teams should feel empowered to take risks and try new approaches without the fear of failure.

Communicate the project

It is a good idea to share the successes of the project or team with the wider association. This breeds a sense of pride and helps establish the expectations of collaborative work.

These successes can be communicated via meetings, staff newsletters, or more creative methods such as updates via vlogs, staff interviews, memes etc.

In these updates, include the progress of the work, and highlight how the cross-functional team is successfully working together.

Measure and reward collaboration

To sustain a culture of collaboration, it's important to measure and reward milestones and successes. acknowledge outstanding work and celebrate wins! This can be through formal awards, bonuses, or public recognition.

Pause and reset

Schedule regular 'pause and reset' meetings where you share mistakes and learnings, ask for and offer help, and challenge the team to do better – are processes working, agendas helpful, is the work going well, what should be adapted, added or binned? These meetings promote problem solving, collaboration and prepare the team for a successful next phase.

Association Talent Challenge

Summary: The evolving association landscape demands new strategies for talent acquisition and retention. Associations must build strong employer brands, offer development opportunities, embrace agility, and foster positive workplace cultures. Leveraging technology, addressing talent gaps, and competitive compensation ensure long-term success.

The world of associations is rapidly changing, and there is an urgent need to address the evolving talent that comes with it. As organizations strive to remain relevant and practical, they face the dual challenge of attracting top talent and retaining a skilled workforce. The talent competition is fierce, and associations must adopt innovative strategies to thrive in this agile environment. This article explores the key challenges and provides actionable insights to help associations navigate these 21st century realities.

The Changing Talent Landscape

The traditional talent acquisition and retention model is no longer sufficient in today's fast-paced world. Associations are competing not just with other similar organizations but also with the private and public sectors. The emergence of remote work, the gig economy, and a generation of workers prioritizing purpose over paychecks are reshaping the talent pool.

Associations must understand that today's professionals seek more than just a job—they look for meaningful work, opportunities for growth, and a culture that aligns with their values. The challenge is creating an environment that attracts this talent while fostering their development and loyalty.

Strategic Talent Acquisition

To attract top talent, associations must refine their recruitment and retention strategies. This strategy involves more than just posting job openings; it requires a holistic approach that starts with building a strong employer brand. A compelling brand communicates the association's purpose, mission, values, and the impact of its work.

Associations should leverage digital platforms to reach a broader audience and showcase their unique value proposition. Utilizing social media, professional networks like LinkedIn, and specialized job boards can help target specific demographics and skill sets. Additionally, partnerships with educational institutions can create a pipeline for young professionals entering the workforce.

Developing Talent from Within

Retention begins with development. Associations must invest in their employees' growth through continuous learning and professional development opportunities. Professional development enhances the workforce's skill set and demonstrates a commitment to their long-term success.

Implementing mentorship programs, offering access to industry-specific training, and supporting attendance at conferences and workshops are effective ways to foster development. Associations should also consider creating personalized development plans that align individual career goals with organizational objectives. This alignment ensures employees feel valued and see a clear path to advancement within the organization.

Embracing Agile Talent Management

The concept of agility in talent management is indispensable for associations. This flexibility involves being responsive to changes in the external environment and quickly adapting to new challenges and opportunities. Agile talent management practices include flexible work arrangements, cross-functional teams, and a focus on outcomes rather than processes.

Flexible work arrangements, such as remote work and flexible hours, have become increasingly important, especially in the wake of the COVID-19 pandemic. These arrangements not only attract talent but also improve employee satisfaction and retention. Cross-functional teams can enhance innovation and collaboration, enabling the association to leverage diverse skills and perspectives to solve complex problems.

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Cultivating a Positive Workplace Culture

A positive workplace culture is a significant factor in attracting and retaining talent. Associations must strive to create an inclusive environment where employees feel respected, valued, and empowered. This work culture promotes diversity, equity, and inclusion (DEI) initiatives, encourages open communication, and recognizes and rewards contributions.

Leadership plays a critical role in shaping culture. Leaders should model the values and behaviors they wish to see in their teams, fostering a sense of trust and transparency. Regular feedback and recognition programs can also enhance morale and engagement, making employees feel appreciated and motivated to contribute their best.

Leveraging Technology for Talent Management

Technology can be a powerful ally in talent management. Associations should embrace tools that streamline HR processes, enhance communication, and facilitate remote work. Applicant tracking systems (ATS), performance management software, and learning management systems (LMS) can significantly improve efficiency and effectiveness in managing talent.

Moreover, data analytics can provide valuable insights into workforce trends, enabling associations to make informed decisions. By analyzing data on employee performance, engagement, and turnover, organizations can identify areas for improvement and develop targeted strategies to address them.

Addressing the Talent Gap

Despite dedicated efforts, associations may still face talent gaps in critical areas. Addressing these gaps is where creative solutions such as upskilling, reskilling, and partnerships come into play. Upskilling involves enhancing the current workforce's skills to meet new demands, while reskilling focuses on training employees for new roles.

Partnerships with other organizations, including corporations, non-profits, and educational institutions, can also help bridge talent gaps. These collaborations can provide access to specialized expertise, resources, and training programs that might be unavailable.

Compensation

Associations have tended to be low or mid-compensation employers. The changing economic order will no longer be easy to maintain. Rethinking resource allocation is necessary. Associations must be more competitive as younger talent enters the workforce with higher debt and new expectations.

Indeed, the organization's mission, value, and purpose are also at the top of the mind; however, economic conditions will play a more significant role in talent acquisition and retention.

Conclusion

The association talent challenge is multifaceted and requires a strategic and adaptive approach. By building a strong employer brand, investing in employee development, embracing agile management practices, fostering a positive workplace culture, leveraging technology, addressing talent gaps creatively, and compensation realities, associations can position themselves for long-term success.

The key is to view talent management not as a one-time effort but as an ongoing commitment to creating an environment where employees can thrive. Associations that rise to this challenge will not only attract and retain top talent but also drive innovation, achieve their missions, and make a lasting impact on the communities they serve.

Goodbye talent acquisition, recruitment is marketing

Summary: In today's tight labour market, traditional talent acquisition is outdated. Instead, recruitment must adopt a marketing-led approach, leveraging a compelling employee value proposition (EVP). This shift attracts, engages, and retains talent by treating recruitment like marketing and selling opportunities effectively.

Forget the 'war on talent'. Talent acquisition and retention has long been the top issue keeping leaders awake at night.

Talent challenges are here to stay.

The last five years have been a marathon of change and uncertainty for organisations and individuals. The ever-changing landscape of employee expectations and challenges with employee retention, engagement and attraction are just some of the key issues facing association leaders; amplified by macroeconomic conditions and an evolving (but still tight) labour market.

75% of CEOs report adverse impacts from widespread skills shortages.

When we consider the skills shortage alongside the changed dynamic of work and other workplace statistics, the result is a powerful picture of the *era of talent.*

- Average tenure is half of what it was a decade ago.
- Average employee turnover is 15%.
- 1 in 3 employers report turnover of 20% or above.
- Unemployment is up, but expected to remain low.

People are on the move. Turnover is the new normal. Talent challenges are a given.

No matter what the 'market' is doing, there will always be competition for good employees.

Recruitment is rarely easy, but it's mission-critical.

One of the reasons behind this increased talent mobility and higher turnover is the evolution of employment. The meaning and purpose of work has evolved, as so has the relationship between employer and employee.

In the 1990s, the world began measuring employee engagement and the concept of a 'war on talent' was coined by McKinsey. Not long after this, we started talking about the 'future of work'. It's time to move on from these things.

New era, new mindset.

Association leaders need to evolve their thinking and adopt a new mindset to match the new dynamic of work and the era of talent.

It's time to say goodbye to 'talent acquisition'. How can a 4000 year-old concept be fit for purpose today?

The concept of 'talent acquisition' goes back to ancient empires. Think government-led, military recruitment where the employer is in control and 99% of applicants fail to pass the entry exam.

This archaic approach and language has no place in the modern workforce landscape. It's no wonder traditional hiring methods are failing us.

Employers don't acquire talent. Recruitment is not a 'buying' activity. When you need to hire, you're selling.

Recruitment is marketing. The consumer is the talent you're trying to attract, engage and retain. The product is the job you want them to choose, and keep.

To effectively tackle talent challenges, hiring teams need to shift their mindset towards a more modern approach of *talent attraction*.

Bio A communication practitioner turned recruiter, Cynthia and her team help nonprofit leaders build happy, engaged, high-performing teams. She's on a mission to help leaders understand the talent landscape and tackle challenges including competition for talent and the evolving employee/employer dynamic. Heart Talent delivers recruitment results through a modern, marketing-led approach.

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How can association leaders get better at talent attraction?

Hiring the right people can be transformational for your association. Recruitment is an opportunity to upgrade your team and drive your mission and purpose forward.

For the individual, a job is a big-ticket item. Finding the right job can be a life-changing decision. Looking for a new job is an expression of optimism, a way of saying: I want something better, something different.

Effective recruitment is engaging hearts and minds. Attracting the right people and engaging them in your organisation starts with understanding *why* your association and the job opportunity you're offering is a great choice.

Attracting, engaging and retaining the right people is not dissimilar to member engagement and retention. It begins with understanding and articulating your employee value proposition (EVP).

Your EVP is more than a list of benefits and a flexible working policy. It's the ecosystem of support, recognition and value an employer provides to employees. Authentic, compelling and evidence-based, your EVP is what your people appreciate. It's why they choose you and why they stay.

Associations have an largely untapped opportunity to leverage their EVP in hiring and adopt a modern, marketing-led approach.

Heart Talent's research found less than half of nonprofit employers have a defined EVP present in their job advertising and careers pages.

Yet a compelling, authentic EVP is the first step in gaining your competitive advantage in a tight labour market.

Your association's EVP is a powerful tool in your talent strategy. The Heart Talent team has seen this approach increase an employer's talent pool up to five-fold in a couple of weeks and secure top talent in just 18 days.

Modern talent attraction in action

Picture this. A national nonprofit organisation needs to hire someone for a mission-critical role. They have a strong brand and have grown significantly in revenue, impact and awareness over the last couple of years.

They post a job ad on a mainstream job board and the CEO shares the role with her network on LinkedIn. They receive 26 applications, none of which are suitable.

Next, they take a more modern, marketing-led approach.

Using insights from conversations with key stakeholders, the hiring team crafts a compelling, authentic recruitment marketing campaign, getting the balance right between selling the opportunity and being honest and transparent at the same time.

The results speak for themselves. Within 10 days, the recruitment campaign achieved:

- more than 1,800 engagements online (clicks, not impressions)
- average 7.25% click through rate (CTR) across three platforms
- an exceptional 33% response to cold outreach (ie headhunting)
- an actively engaged, qualified talent pool of 139 people
- more than 20 people are identified as suitable, matched talent and engaged in the process.

Through this proactive, marketing-led approach, this nonprofit secured the right talent in just 18 days.

In the era of talent, forward-thinking leaders are always recruiting, even when they're not hiring. This involves a proactive approach to understanding the value you provide to your employees, and leveraging this when you need to hire.

Two-thirds of nonprofit organisations report competition for talent as their biggest challenge. A modern, marketing-led approach is the answer to your talent challenges.

Embracing the 4-Day Workweek: A Strategic Advantage for Associations

Summary: A four-day workweek enhances productivity, employee well-being, and innovation for associations. By aligning with modern workforce expectations, fostering a positive culture, and leveraging technology, associations can improve member services and reduce burnout, creating a strategic advantage in today's evolving work environment.

In the rapidly changing work environment, where flexibility and efficiency are becoming paramount, the concept of a four-day workweek is gaining momentum. For associations, this model offers a chance to enhance employee well-being while driving productivity and innovation.

In 2018, the 4 Day Week Global movement was co-founded by Andrew Barnes and Charlotte Lockhart. Their initiative began after a successful trial of the four-day workweek at Perpetual Guardian, the New Zealand company Andrew led, which demonstrated significant improvements in productivity and employee well-being. Today, the 4 Day Week movement has inspired organisations worldwide to rethink traditional work models, with associations also exploring the potential benefits of this innovative approach.

Strategic Reasons for Considering a four-Day Workweek

Aligning with Evolving Workforce Expectations

Today's workforce increasingly values work-life balance, flexibility, and outcomes over hours worked. By adopting a four-day workweek, associations can align with these evolving expectations, making themselves more attractive to current and potential employees. This shift aids in retaining top talent and builds a reputation as a progressive, forward-thinking organisation.

Enhancing Member Service Quality

Associations exist to serve their members, and employee well-being directly influences the quality of service provided. A four-day workweek can lead to more rested, focused, and engaged employees who are better equipped to meet member needs. When employees have more time to recharge, they bring greater energy and creativity to their roles, translating into enhanced member experiences.

Driving Innovation and Thought Leadership

As leaders within their sectors, associations can use the four-day workweek to demonstrate innovation. This move positions the organisation as a pioneer in modern work practices, setting an example for members and other organisations to follow, and strengthens its leadership role within the industry.

Impact on Productivity

Focused Efficiency

A key concern with the four-day workweek is potential productivity loss. However, the compressed workweek encourages employees to prioritise tasks, eliminate unnecessary activities, and focus on what truly matters. This results in more efficient work processes and sustained, if not improved, productivity levels. Clear performance metrics and continuous monitoring are essential to ensure productivity is maintained.

Reduced Burnout, Increased Output

A four-day workweek can mitigate burnout by giving employees more time to rest. This means they return to work more refreshed and motivated, boosting overall productivity.

Leveraging Technology

In today's digital age, technology plays a crucial role in supporting productivity during a four-day workweek. Collaboration platforms and automated processes can streamline workflows, ensuring that work progresses smoothly even with fewer days in the office. For associations, these technologies help maintain high levels of member service.

Bio Mark is an experienced Association Executive, Non-Executive Director, and Chartered Governance Professional. He is the Founder and Managing Director of Apoth Consulting, which is dedicated to supporting associations to optimise their board governance and risk management and providing a tailored approach to successfully implementing the four-day work week.

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Addressing Hesitations and Overcoming Challenges

Concern Over Member Access and Support

One common concern is that a four-day workweek might reduce member access to support and services. One way this can be addressed is by implementing staggered work schedules, ensuring the organisation remains operational five days a week while individual employees benefit from a four-day schedule. Clear communication with members about the change, along with assurances of continued support, helps manage expectations and maintain member satisfaction.

Managing Organisational Change

Transitioning to a four-day workweek is a significant change that may meet resistance, especially from those fearing disruption to established workflows. A phased implementation, starting with a pilot program in a specific department, can help mitigate these concerns. This approach allows the organisation to evaluate the impact, make necessary adjustments, and build confidence among staff and leadership before a full rollout. Engaging an external consultant to support the preparation and implementation has proven beneficial for many organisations.

Benefits to Culture and Staff Well-Being

Strengthening Work-Life Balance

A four-day workweek offers employees a better work-life balance, giving them more time for personal pursuits, family, and rest. This balance leads to happier, more engaged, and more loyal staff. For associations, where employee engagement directly impacts member relations, this is a significant advantage.

Fostering a Positive Organisational Culture

Implementing a four-day workweek helps cultivate a culture of trust and respect. It shows that leadership values employee well-being, leading to higher levels of morale and job satisfaction. A positive workplace culture is essential for retaining talent and fostering a collaborative, innovative environment.

Reducing Turnover and Absenteeism

With a more balanced work schedule, employees are less likely to experience burnout, reducing absenteeism and turnover rates. This is particularly beneficial for associations, where continuity in staff is crucial for maintaining strong member relationships. Lower turnover also reduces costs and disruptions associated with recruitment and training.

Enhancing Creativity and Innovation

A four-day workweek gives employees more time to relax and recharge, leading to greater creativity and innovation. This is valuable in associations, where innovative ideas are often needed to develop new member services, programs, and engagement strategies.

For CEOs and Board Directors of associations, implementing a four-day workweek is a strategic and forward-thinking decision. While challenges exist, they can be easily overcome and the potential benefits—improved productivity, employee well-being, enhanced member satisfaction, and a positive organisational culture—make it a compelling consideration. By carefully planning the transition, addressing concerns proactively, and leveraging technology, associations can successfully adopt a four-day workweek, positioning themselves as leaders in their industry and the future of work.

-Whether you're ready to introduce the 4-day workweek to your association or simply want to explore the idea further, let's connect to discuss the possibilities and how I can help support a tailored and seamless implementation for your organisation.

Want to be truly adaptable? Focus on building soft processes.

Summary: Nigel Collin advises associations to embrace uncertainty by building adaptability through "soft processes" like a growth mindset and knowledge-sharing. Small, consistent changes—his "Game of Inches" approach—foster resilience without overwhelming teams. By nurturing a culture of learning and open communication, associations can thrive amid constant change.

'The goal is not to eliminate uncertainty but build adaptability within your association' says Nigel Collin.

In the ever-shifting landscape of the current association environment, uncertainty is a formidable challenge. The siren call of adaptability echoes through boardrooms and strategy sessions. However, true adaptability isn't about eliminating uncertainty, it is about embracing, nurturing, and thriving in its midst. But how do we achieve this? The answer lies not in rigid, unyielding processes but in the soft, malleable ones that shape our associations from the inside out.

That can seem difficult at times because soft skills like mindset and knowledge sharing are intangible and, as a result, often take a back seat to tangible hard processes like marketing funnels and education platforms. Yet soft skills drive tangible results such as membership value, innovation, and sustainable growth.

Develop a Mindset of Change

At the heart of adaptability lies a growth mindset, first proposed by Carol Dweck. This mindset is the belief that we can constantly grow, learn, and develop. When your team believes in its ability to adapt and grow, it's more likely to see challenges as opportunities, setbacks as stepping stones, and start to embrace change.

Nurture a growth mindset culture

Help your team and members understand the value and contribution of a growth mindset to themselves, personally and professionally. Implement workshops, coaching, and formal and informal resources.

Recognise effort and progress, not just outcomes

Focusing on the steps needed to achieve something creates confidence and momentum in moving ahead.

Lead by example

Demonstrating your commitment to learning and embracing a mindset of change creates a ripple effect and builds trust.

Bio Nigel Collin is an awarded international speaker and strategic facilitator. he specialises in nurturing a growth mindset of change and a 'Game of Inches' philosophy of small, consistent steps'.

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Nigel Collin

Create frameworks for knowledge-sharing

Your association has a wealth of knowledge in your people and your members. Developing frameworks for shared knowledge isn't just about having a sound filing system, it's about creating a culture where information flows freely and ideas cross-pollinate. It's about allowing members to engage and put forward ideas.

Give permission

Create a safe place where people feel encouraged to contribute ideas without fear of ridicule or dismissal.

Establish regular knowledge-sharing sessions

Make it a part of your association's culture not just a one-off.

Create a multi-dimensional mentoring program

Not just top-down but sideways and bottom-up because wisdom flows in all directions.

Master the Game of Inches

To be adaptive, you don't need to change everything you do or how you do it. You just need to be flexible, one step at a time. Being comfortable with small, consistent changes builds confidence in your ability to change. That expands your comfort zone and builds adaptability. So encourage and empower small, consistent change.

Start small

Focus on one area where you can start building a growth mindset culture or a knowledge-sharing framework.

Celebrate small wins

Did someone share a valuable insight? Recognise it publicly. This reinforces the behaviour you want to see.

Continue to improve

Your first attempt might not be perfect, and that's okay. Remember, it's about progress, not perfection.

Final thoughts

In the face of uncertainty, our instinct is to batten the hatches or create more rules and rigid processes. But true adaptability comes from embracing change and seeing challenges as opportunities for growth. It's about tapping into the wisdom of the room by creating avenues for knowledge sharing. And it's about doing so, one small step at a time.

The Volunteer Revolution: Passion, Purpose and Pitfalls in the Engagement of Our Association's Lifeblood

Summary: Associations must revolutionize volunteer engagement by creating purpose-driven opportunities that align with volunteers' motivations, fostering intergenerational teams, offering flexible micro-volunteering, and emphasizing volunteer impact. A personalized, benefit-focused approach will lead to increased participation, satisfaction, and long-term success for both volunteers and associations.

Let's cut to the chase, shall we? Volunteer recruitment and retention isn't just another project on your association's to-do list. It's not even a mere "membership issue." And don't tell me that "volunteer engagement is everyone's job" – we know what that means. No, what we're facing is a full-blown, value-driven, multigenerational, communications and engagement EMERGENCY. (*Yes, all caps. It's that serious*.)

I get it. We throw the word "engagement" around like it has a Webster's definition or a hard and fast calculation. In Naylor's Association Benchmarking Report, I was surprised to see that "volunteerism" was FIFTH down on the list of most important criteria for assessing member engagement. Are we relying less on volunteerism as a metric of engagement because it's waning? Or do we just not yet know how to truly measure volunteer engagement? More importantly, do we know how to measure the return on investment FOR the volunteers?

However you measure engagement, if you're still relying on the same old volunteer management playbook from the last decade or even from the COVID years, I hate to break it to you, but you're already behind. Way behind and likely running low on people, interest, and enthusiasm! It's time to toss out that dusty approach and embrace a volunteer revolution that will propel your association into a relationship-centric and participatory-fueled future. Buckle up because we're about to challenge everything you thought you knew about volunteer engagement.

Based on my own experiences and global consulting work with member associations, I am convinced that we need to establish a new paradigm for volunteerism. We must present a bold new vision for engagement in and with our associations. We need to build a mutually beneficial connection that sparks involvement in all its forms. What I'm advocating for is *radical selflessness* within your association. This goes beyond a members-first or volunteers-first slogan; it's about creating a culture of volunteer engagement that is *entirely focused* on who they are, how they want to participate, and what they want/need out of it.

Creating a Culture of Purpose-Driven Volunteerism

In a culture of *radical selflessness, v*olunteers would actually care about, benefit from, and want to do the work required of their volunteer role. I know, groundbreaking stuff. But seriously, today's professionals are looking for more than just a line on their resume or an online badge. They want purpose, impact, and a chance to make a difference, not to be your free labor.

Start by clearly communicating the association's mission and how each volunteer role contributes to that bigger picture. Share success stories and tangible outcomes. And PLEASE, stop treating volunteers like workers. They are your purpose and partners in your mission, not unpaid interns.

Establish volunteerism as a strategic thread throughout all organizational goals. Make benefit to them the criteria for which programs get started and which continue. I understand that all nonprofit associations have paid staff. For those organizations run by volunteers for members, the lift is even heavier, meaning the connection to mission, demonstration of volunteer impact, and value proposition for participation is that much more necessary.

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The Personalized Volunteer Journey: One Size Fits None

Too often, volunteers are a list of names, a field in the database, or, at worst, a check box in the member profile. It's time to recognize that each volunteer is unique, with their own motivations, skills, and availability. Develop a personalized volunteer journey map that guides individuals from initial interest to long-term engagement. Think of it as a "choose-your-own-adventure" opportunity. Use data and feedback to tailor opportunities, appreciation, and communication to each volunteer's preferences. It's not rocket science, but it might just feel like it compared to our current approach. With awareness of opportunity, appreciation of impact, measure of benefit, and the potential of recognition – volunteers will give their time and expertise!

Intergenerational Volunteer Teams: Because Age Is Just a Number

Stop pigeonholing volunteers based on their age. Yes, our Gen Z volunteers are probably better at TikTok, and our Boomers might have more board experience. But the magic happens when we bring these diverse perspectives together. Please stop relegating you're your young members to "Emerging Leaders Councils" or asking them to coordinate the community service projects. Create intergenerational volunteer teams that leverage the strengths of each cohort. Pair the tech-savvy of any age with seasoned industry veterans. Implement reverse mentoring programs. The resulting knowledge transfer and innovation will make you wonder why we ever segregated volunteers by age in the first place.

In addition to what they can contribute, the age of a volunteer, or more importantly, where they are in their career or life journey, will help determine what they expect and need from the volunteer experience. Don't presume all volunteers under 30 want the same thing. Ask and listen to volunteers (*and members, for that matter*) of all ages.

Micro Volunteering for Them, with the Help of Technology

News flash: Not everyone has time for a year-long or multiyear committee commitment. Shocking, I know. Enter micro-volunteering. Is it the answer to everything? No. But these bite-sized opportunities allow volunteers to contribute in meaningful ways without sacrificing their firstborn or their sanity. Think 30-minute virtual mentoring sessions, one-hour content reviews, or quick social media takeovers.

By offering a variety of micro-volunteering options, you can tap into a whole new pool of talented individuals who might have otherwise passed on traditional volunteer roles. In the end, however, it still comes back to what volunteers get out of giving. It's not just about smaller chunks of time or effort. You need to demonstrate a benefit no matter the size of the taskask, especially if you want them to come back and play an even larger role in the future.

Micro volunteering is made more possible and impactful through technology. By embracing digital tools and creating tech-savvy positions, associations can provide meaningful experiences that match modern volunteers' skills, ensuring more efficient use of the volunteers' time and amplifying their impact.

The Revolution Starts Now

It's time for a revolution in how we engage, empower, and elevate our volunteers. By building a culture of *radical selflessness* and focusing on the volunteers' motivations, expectations, and skill sets, you can transform your volunteer program from a necessary evil into a dynamic engine of organizational success. Most importantly, the volunteers must get something out of it. They deserve to! In turn, they'll want to do more, they'll share their positive experience with others, and they will become more successful as individuals, members, and potential leaders. The future of our association depends on it. No pressure or anything.

Balancing Automation and Human Interaction in Digital Spaces

Summary: AI offers associations great opportunities to enhance member experiences and streamline processes, but human oversight remains crucial. Automated tools must be carefully monitored to avoid misinformation and unfair practices. Strategic, ethical use of AI safeguards reputation and supports long-term success.

AI continues to be at the forefront of conversations around the future of work (remember a few years ago when we went through this cycle?). But this isn't just about creating efficiencies and automations. There is an aspect of this technology that changes the way we think about content strategies and controls around those strategies that ensure that misinformation and disinformation doesn't erode the credibility of our digital spaces. Associations, nonprofits, and social impact organizations cannot afford to become a casualty of the misuse of these tools. There's immense opportunity in the current wave of this technology to move us into the future, but there is massive risk to take into consideration.

We've been here before. Right before the pandemic we were all talking about how AI was the wave of the future and how it would change everything and take our jobs. And while it didn't take our jobs, it did open doors for new and innovative ways to personalize experiences, streamline processes, and help us move a little faster in the world.

The Role of AI in Advancing Associations

As an association, fundamentally your role in the lives of your members is to help build relationships (between your members, with your members, and across industries/sectors/interests) and help people connect to their purpose. For the most part, the advancements AI brings to associations are exciting.

Using a Large Language Models (LLMs) like ChatGPT, is helping to streamline member support and get them the answers they need quickly. Marketing teams are tapping into the power of AI to make personalizing messaging and offerings to your members easier than ever before. It helps give you insights that may not have been as easy to access before, helping you be more innovative in evolving your association's strategy.

Striking a Balance: Human Oversight in AI Implementation

And yet, not everything is meant to be automated.

As a community professional, I have heard this phrase more times than I'd like to…"can't we just automate our community moderation?" or "can we just use AI to write our content?"

You don't need me to tell you what I'm about to tell you, but I will. Yes AND please don't rely solely on that. Let me explain.

There is inherent value in using AI to aid in moderation and content generation but you should not rely on it in totality to perform these tasks.

When it comes to moderation, AI can help you catch words or phrases that are prohibited and send them to moderation before the community even sees it, saving you a world of headache when information spreads faster than you can blink. It can help you identify hot topics in your community or understand sentiment around a specific topic. Additionally, it can help make the digital experience with your association - be that in your online community, LMS, or event app - more personal.

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But, specifically as it pertains to community moderation, you can't expect it to be fair or have any level of trusted precision. Just because it caught a banned word doesn't mean it caught the context of that word. For instance, if the word "sex" is on your banned words list, what automation may not catch is that the actual context in which it was used was "how do I ask for sexual orientation and/or pronouns in a sensitive way on my membership registration form?" Conversely, someone might use the word "fluffy" which might not be on your banned words list (and seems mostly harmless, right?) and the conversation that contains that word is being used in a defamatory way against another member. While it helps create efficiencies around the process, someone still needs to physically review and respond accordingly to ensure proper resolution and follow-up.

When it comes to content generation, we've all seen AI spit out some really convincing articles, policies, etc. However, I've seen way too many times people skim what was generated and say "that looks good" without checking the information or cross referencing sources and then posting something that's completely plagiarized, contains false information, or is just word salad. So, again, while it helps you streamline the generation of that content, a human still must check the work.

Because if we've learned nothing in all of our education and work experience, we absolutely must check our work. And if you fail to understand that AI is meant to help create efficiencies where possible versus replace human-driven processes, you leave your organization's reputation vulnerable to being known for misinformation, unfair member engagement practices, being difficult to work with, and a host of other issues that are hard to walk back once that trust is lost.

Safeguarding Your Association's Reputation in a Digital World

So what can we do to safeguard ourselves against such pitfalls in a digital world while still using AI to move our associations forward?

If you are an executive or founder in an association, nonprofit, or social impact organization, you have a responsibility of ensuring you strategize for these areas holistically as part of your business operations, not just as one off programs.

- Develop clear and concrete strategies for how AI enhances your business value,
- develop tight governance around how people are using and engaging with these tools and platforms for their ethical use, and
- be clear on how you will identify the root cause of engagement issues (should they arise) to enhance your member's experience with you.

If you haven't defined any of this, take two steps back before you take the next one forward and have hard conversations with your leadership teams and hold them accountable. Understand AI's risk and benefits as it pertains to YOUR business and organization and apply it accordingly. It was meant to make our lives easier, not put them on autopilot.

Instituting these strategies requires just as much rigor, care, and dedication as your thinking around your membership, events, or other mission-driven strategies. Because neglecting to be intentional about how you think about these initiatives will eventually affect your reputation and your bottom line.

Five Essentials for Chapter Success

Summary: Chapters thrive by focusing on key practices: understanding their core audience, maximizing volunteer potential through training, using data to identify who attends events, measuring meaningful outcomes with dashboards, and fostering continuous support and leadership development for long-term success.

In the dynamic world of associations, local chapters play a crucial role in connecting members and delivering value within their communities. Chapters—also referred to as branches, divisions, or sections—are local groups that foster regional connections, community-based networking, support, and alignment with the organisation’s mission.

For chapters to thrive, they must prioritize the elements that truly matter. Research and experience point to five essential practices.

1. Know your customers

Chapters need to focus on members they can serve well, which is unlikely to be all members in their area. Assuming your chapters, like most, are primarily about making local connections, their core customer base will be those members for whom getting together with others is a central driver. Research suggests this motivation will be a strong driver in 15-25% of your members. Rather than beat themselves up over the 75-85% who seem uninterested in local programming, chapters should concentrate on delivering the best possible in-person experience to those who will appreciate it.

2. Maximize your volunteers

Willingness to volunteer does not always equate to the skills or knowledge needed. Often, we skip the training volunteers need to succeed. When we shift from a “here’s what we need from you” attitude to a “what do you need from us” approach we align training with volunteer’s motivations and aspirations. This requires equipping chapters with resources, on-demand training, and access to experts to help their volunteers be the most they can be.

3. Know your data

Chapters can usually tell “how many” attended an event, yet often not identify “who” attended an event. Understanding the “who” is central to identifying the profile and the “why” of the chapter’s core customer. This lets chapters connect with other members who have the same or a similar profile and “why.”

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Bio Peter Houstle traded life on the road in a band for an MBA and the opportunity to jump on the bandwagon for associations. He serves as executive director for the US-based Maryland Recycling Network as well as president of Mariner Management which specializes in chapter and volunteer strategy for associations globally.

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4. Measure what matters

The 2022 Association Chapter Benchmarking report revealed that fragmented and disconnected data leads to fractured views of how chapter systems deliver value to the members and serve the mission. Enter the future-focused dashboard, a practical approach to help you evaluate a chapter's health and pinpoint ways to strengthen it. Replacing the checklist for chapters, this dashboard provides a view of success metrics and performance measures that help chapters identify areas for improvement or maintenance. The dashboard can also show the impact of chapters in totality with a picture available for each chapter and, better yet, spark strategic conversations with the chapter leaders and the c-suite.

5. Putting it all together

Find ways to support your chapters by helping them develop habits that can make all the difference. Here are seven good habits for you and your chapters to embrace.

- Right-size chapter activities and leadership job descriptions. Embrace informal volunteering and shed activities that don't make a difference.
- Stay in touch with association staff and the chapter leader community. Build a peer community and tap into the host association.
- Learn and play by the rules, including legal, regulatory, accounting and management.
- Document everything in writing or video. Make sure at the chapter level (and the host association level) procedures, policies, training and how-to's are available on-demand to help busy volunteers. The bonus is carrying this through to members – my professional association offers a set of how-to videos to access the member portal and more.
- Dedicate time for learning. As a chapter leader, invest in yourself, not just in volunteer job-related training but also in the industry trends, the association sphere and your association in particular.
- Think strategically and innovatively about your chapter and its legacy. Build time into board meetings to discuss strategic issues. Host associations share research, trends and intel from the national/global perspective with chapters.
- Constantly develop volunteer and leadership talent. This is how you build a vibrant pipeline.

Unlocking Volunteer Engagement

Summary: Associations face challenges with volunteer engagement, but positive trends show promise. Volunteers seek meaningful impact, and small shifts, such as broadening opportunities, improving recruitment, and enhancing training, can drive engagement. Focusing on connection over commitment helps unlock the potential of volunteers.

Why are associations struggling with volunteerism?

Despite efforts, less than one-third of volunteers are rated highly effective. Over half of associations accept volunteers who are less qualified or committed, and 44% would rather replace them with staff. The ASAE Foundation's study, "Holistic Approach to Association Volunteer Management," reveals these challenges, painting a grim picture. Yet, amidst the difficulties, there are promising signs.

Bio For 30 years, Peggy Hoffman, FASAE, CAE, has worked with and experienced the power of volunteers driving an interest in discovering what makes the best volunteer experience. As president Mariner Management, home to Maryland Recycling Network, she works with dozens of associations globally and through Mariner leads research on volunteerism.

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Consider these Bright Spots

The study found that volunteerism is strong. Association staff reported the total number of volunteers over five years (2017-2021) increased or remained stable (41% and 37%). Many volunteers – nearly 70% – said they will continue volunteering and share the message of the value of volunteering.

MCI's 2024 Association Engagement Index reports that 31% of members and customers are highly interested in contributing actively to their association's content, programs and strategy. Their findings echo numerous association-related engagement studies.

More good news: associations may be able to overcome non-volunteers reluctance with relatively small shifts. Consider that time constraints were the top reason members hadn't volunteered, followed by uncertainty about what volunteering entailed and the fact that no one had asked them to volunteer.

The top reason for volunteering and considering volunteering continues to be the ability to make a difference with others who share an interest. Members don't just want to volunteer; they want to be involved and have an impact. That's what our volunteering is about.

These positive trends suggest that with the right strategies, associations can harness the potential of their volunteers. The challenges are our call for action today.

Four Shifts to Embrace

1. **Ban the V word**: Tying into the motivating factor, we need to shift our messaging from a call for volunteers to a call to connect. Lead with the issue and the intended impact. Invite members to be part of the action. Site navigation that uses terms like "Get Involved" or "Get Connected" drives more clicks than "Volunteer."
2. **Expand your volunteer opportunity portfolio.** Embrace a variety of volunteering options from micro-volunteering to episodic to traditional. We're seeing more and more associations try out this option, like the global Project Management Institute or the US-based National Apartment Association.
3. **Widen the recruitment lens**: Start by examining your volunteer recruitment messaging. Are you leading with time-intensive options, such as committees, councils, or boards? Consider using the voices and faces of your volunteers instead of staff-driven words and stock photos.

   Next, Evaluate your channels. Where is volunteering placed on your website? Is it easy to find through a search? While we all use our websites and annual calls for volunteers, think about what other channels you might be missing.

   Finally, examine your volunteer pool. Do you have an emerging leaders' program or a next-gen group? How actively are you tapping into these groups for volunteers?
4. **Focus on orientation and training**: We will have volunteers who are enthusiastic yet not quite qualified and those who are willing yet not quite aligned. Enter the power of effective orientation and training. Start early with your ad hoc volunteers. Create accessible, on-demand learning options.

Ready to dive more deeply?

A roadmap for designing a comprehensive volunteer strategy can be found in ASAE Research Foundation's Holistic Approach to Association Volunteer Management.

Mariner was the research lead on two volunteer studies for the ASAE Foundation including the Holistic Approach to Association Volunteer Management.

Use This Small Secret to Engage Your Members

Summary: To boost member engagement, associations should focus on earning "micro-permissions" — small decisions members make to engage with content. By optimizing each step, such as subject lines, email length, and calls to action, associations can nudge members toward deeper, more consistent participation.

There's a powerful yet often overlooked engagement strategy—micro-permissions.

Imagine your next new member saying, "I'm going to read every single email you send me and act on it—IMMEDIATELY!" Not only that, because they are reading every email, they also read each new article and research report. They attend the onboarding event and each webinar, and they become the most well-informed member you've ever had. (By the way, this article is NOT about email; keep reading, and I'll explain the big strategic 'Ah Ha' in a minute.)

Except, we know it doesn't work that way. The average email open rate for non-profit membership organizations as of mid-2024 is 38.56%, says Constant Contact. But, as my friend Dave Will, CEO of PropFuel, will tell you, the open rate is an inaccurate measure and not a good proxy for people who are actually reading an email. Some email systems automatically "open" emails, and others block emails from being counted. So, how many people read any given email? 30%, 20%, 10%? I'm unsure, but it is most certainly a fraction of your membership.

This brings us to the next logical yet frustrating question: Why would someone join and ignore opportunities to gain value from their investment? Well, they are busy for sure. There are other urgent priorities to attend to. It is easier not to engage (in fact, brains are hardwired to say "no.") Yet, sometimes, members read emails.

So, can we nudge them to engage more often? Thankfully, YES!

The answer lies in micro-permissions. When they joined, registered for an event, or signed up for the newsletter, we earned permission to contact them. But we haven't yet earned their permission to pay attention to what we are sending them. An opt-in is a legal permission, while a micro permission is the little nudge that helps members take that next crucial engaging step. It's a tiny decision to open, read, lean in, ask a question, call you, click, scan, pause, think, learn, smile, wave, say "hi," and read some more.

So, how do we earn micro-permissions? Let's start by thinking through all the little decisions people make as they engage using our email example.

Many people "batch email." In other words, they spend a block of time clearing out their inbox. What might cause them to pause their inbox scan and pick your email out of the line-up?

Send them from a trusted person – "Rebecca at AOA" (Acronym of Association) has a better chance than "Membership," "Membership Department," or "Info," especially if they know that Rebecca writes a great message.

Test your snappy subject lines – constantly dream up new ones and measure them to determine what works best for your unique audience.

Great! Your name and subject line make them pause and open your email. But you're not in the clear yet. They've got another micro-decision—whether to abandon the email and continue the cleanout or scan it. So first, they gauge the length and decide how long this will take.

Keep it short – long lists don't work, but a few short sentences or paragraphs do!

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Bio 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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It's short enough, but is it still worth reading?

Make a great first impression – write a first sentence that captures their imagination and promises excellent value for their time. My friend, Chad Littlefield, calls this a Context Hook.

Provide a great reader experience – is the writing concise yet fun? Friendly yet valuable? How are the design, logos, images, and use of color—are they all as professional yet inviting?

And once the reader gets to that last sentence, we've got to earn another micro-permission, the click.

Think through the call to action – the message should lead them to one singular action.

When they click, the cycle of micro-decisions and earning micro-permissions starts over. What tiny barriers might make them abandon the call to action after they click, and how can you make it much easier for them to think, "Oh! I'm intrigued! I want to learn more."

Let's step back from this email example because members, attendees, volunteers, and, well, everyone really, make micro-decisions about everything, not just email, all the time. (Remember I said, "This article is NOT about email?") Members make a bundle of micro-decisions with each step in the engagement journey: while contributing to research, reading research, attending an event, scanning an article, lurking in the community, watching social media, viewing videos, taking training, etc.

Engagement is the compilation of hundreds of micro-decisions like:

- Can I read it now or later?
- Do I ask my question or stay quiet?
- Should I crack open this research report or file it for later?
- Is it safe to participate in this thread, or should I continue to lurk?
- Can I open up and smile during this reception or melt into the background?

Anytime, anywhere, and with any-who you are trying to boost engagement, think through the entire experience. Try to identify all those micro-decisions people might make. Identify the barriers to engagement. Once you've seen that minor niggle, reverse engineer the experience to earn a micro-permission.

You will find that many micro-permissions add up to some enthusiastic engagement!

Digital Councils: PACTS for Content Success

Summary: A digital/content council is essential for an organization's content strategy, fostering collaboration, accountability, and sustainability. By setting priorities, establishing policies, and facilitating decision-making, a digital council ensures transparency and bridges departmental silos, ultimately enhancing the organization's overall content effectiveness and strategy.

A digital/content council is a key element of an organization's ability to create and implement a successful enterprise-wide content strategy. Here's everything you need to know to create a smart, sustainable council that will enable your content to thrive.

What is a digital council?

A digital council is a team made up of leader-level individuals representing the organization's departments that create and/or facilitate content. In associations, those departments usually include education, meetings, advocacy, publications, marketing, and research/science. IT is sometimes represented, sometimes not.

It's crucial that digital council members are department/program leaders but not executives. They must be familiar with the daily work involved with the programs and content and also able to see the value of working across departments. Content and subject-matter experts are fully immersed in the daily work, and executives aren't close enough to the work to assess what is working and what needs improvement.

And importantly, since the members of a digital council are organizational leaders, when they bring organization-wide decisions to the executives for signoff, indicating that they were created by a cross-functional team, the executives are almost guaranteed to approve them.

Important note: My mental model assumes there is an internal team, often working with an external consultant, that serves as the centerpoint of the organization's content strategy, drafting strategies and policies, facilitating discussions, communicating decisions, enforcing policies, and evolving strategies and policies.

Organizations of all sizes are adopting the concept of a digital council.

What a digital council does

Organizations engage a digital council in three different ways:

1. Help creating policies

Good content requires many policies and processes, including:

- Content planning
- Publishing permissions
- Workflows and reviews
- Voice and tone guidelines
- Content duplication/collaboration
- Content lifecycles
- Audience prioritization

These policies and processes often don't exist – or the organization may have multiple ways of working, many implicit. Part of content strategy is to create explicit, organization-wide policies. The content strategy team would draft this, and the digital council members discuss it, bringing their individual perspectives and needs. At the end, the policies would reflect and account for the various perspectives. In time, the list of policies is complete, to be reviewed and revised as necessary.

2. Review major requests

Once policies are in place, the digital council's role shifts to primarily one of prioritizing. For example, major requests, such as platform/functionality upgrades, new website sections, or revised navigation affect the existing work of designers, content editors, web production team members, marketing, or IT team. Absent a digital council, organizations often struggle to decide whether an effort is worth doing, and what it might have to "bump" as a result.

The digital council is the ideal body to make decisions like these, based on members' collective understanding of organizational priorities.

Where policy-setting ideally involves real-time discussions, these reviews can usually happen asynchronously through email or another platform. And the content strategy team can call a meeting if necessary.

Bio Hilary Marsh leads Content Company, a content and digital strategy consultancy helping associations get better results from their content. A leading voice for content strategy in associations, Hilary co-authored a major study for the ASAE Foundation and a chapter in the 2021 edition of Professional Practices in Association Management.

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3. Serve as escalation path

One ongoing challenge for any organization is understanding who can say no to any request. For example,

- If an individual department, wants to use an outside agency to create a separate website for a specific initiative
- if someone wants to create a new social media profile for an initiative
- if someone wants to create content using a new format

…who needs to approve this effort? It can't be just that department's management, since decisions like this need to be documented and communicated, or it might open the door to more rogue efforts.

Similarly, if someone makes a request that gets turned down, they may want to challenge that decision.

In cases like these, as a director-level, cross-departmental team, the digital council is the ideal entity to determine the right answer.

NOTE: Being part of a digital council is very far from a full-time role for participants – in fact, council members are usually very busy overseeing a large amount of content and people. So their involvement is more like a "surgical strike," especially after the initial policy-setting period.

How a digital council makes a difference

As a cross-functional, leader-level team, a digital council bridges organizational silos and sets the stage for enterprise-wide information sharing and decision-making.

Specifically, a digital council has a positive effect in five ways, which we abbreviate with the acronym PACTS:

Priority
Accountability
Connection and Collaboration
Transparency
Sustainability

A digital council sets priorities

A cross-functional, leader-level team is the most effective structure to enable the ***organization*** to choose among competing priorities, and also to determine priorities for significant content/digital/web requests on an ongoing basis.

A digital council establishes accountability

The policies that a digital council agrees on and communicates to each council member's department sets the stage for consistent practices throughout the organization. Further, since council members are department leaders, they can hold the subject-matter experts in their departments accountable for following the agreed-upon policies and practices.

A digital council fosters connection and collaboration

The policies and practices a council advocates for are created collaboratively. This serves to be a model for a new level of connection. From this example, the organization realizes that disconnected or duplicated efforts don't help the audience discover, understand, and use the organization's offerings. Rather, **effectiveness comes from departments working together to plan and execute the offerings.**

A digital council ensures transparency

The nature of a council is to be transparent in its decisions, both in communicating up to executives and down to the individual departments. This sets the stage for greater transparency for each initiative.

A digital council builds sustainability

Organization-wide policies, collaborative decision-making, and transparency are the foundation of audience-centric, effective content.

Is your organization ready for a digital council?

- The council's formation and responsibilities should align with the organization's content strategy maturity level (beginner, intermediate, advanced).
- For beginners, the council may identify champions and facilitate initial conversations.
- For intermediates, the council may draft policies and frameworks for broader adoption.
- For advanced organizations, the council becomes part of the established way of working, with ongoing governance and decision-making responsibilities.

Capital Idea: A Chapter Turnaround Triumphs Despite Global Turmoil

Summary: The Metro DC Chapter of the National Association of Social Workers (NASW) faced major challenges in 2020, including leadership turnover, low member engagement, and financial instability. Under Debra Riggs, the chapter revitalized through digital transformation, new programming, advocacy efforts, and strategic partnerships, significantly improving member engagement and financial stability.

COVID-19 forced most associations to set aside their carefully crafted strategic plans in favor of crisis management plans meant to help both their members and organizations survive—even thrive—amid the myriad outcomes of the deadly virus.

For Debra Riggs, CAE, the new executive director of the Metro DC Chapter of the National Association of Social Workers (NASW), the pandemic came at a particularly tough time. Hired in 2020, Riggs was facing the need for a full chapter turnaround that would require every bit of expertise gained during her 25 years as executive director of NASW's much-larger Virginia Chapter, which she was helming simultaneously.

Many challenges to reinvigorating the District's largest organization of behavioral health providers may be familiar to seasoned association leaders, especially those in healthcare: workforce shortages, low salaries, high burnout rates, professional disrespect, inconsistent advisory board engagement, and an overextended membership.

Riggs had spent much of her onboarding time assessing the chapter's operational status, financial stability, membership trends, and programming. Frankly, the chapter's condition was critical and needed resuscitation "stat". Although DC and its surrounding northern Virginia and Maryland are small geographically, the challenges to rebuilding a "professional home" for the area's social work practitioners were sizeable:

- The former executive director had resigned, so the national office's Chapter Services Department was maintaining the chapter in the interim of a leader.
- The Advisory Board of Directors was nearly nonexistent, with only the vice president remaining active.
- In private conversations, Riggs heard members' frustration that their unique needs were not being met, so renewals were down.
- Key volunteers struggled to revive the chapter, but the death of a lead volunteer and past-president exacerbated the situation.
- The chapter had very limited funds—only $40,000—and no reserve, operating on a deficit with minimal expenses and no staff salary.
- The chapter website—a crucial marketing and membership tool--was outdated and mirrored the national website without a local identity.
- Member engagement was minimal, with no local social media, steady newsletter, or communications plan.

Working with a tight budget, she hired consultants, added staff hours, and reached out to a few volunteers to co-create a strategic plan. But this was barely done when news began breaking about a deadly virus, one that was also infecting or threatening her members' clients and themselves.

The COVID-19 global pandemic had begun, and suddenly, operational and work plans were out the window as life-and-death, real-time situations among her members became all-consuming. The virus and its risks forced a rapid transition to a fully virtual office, a total disruption of the profession toward telehealth, and skyrocketing market demand for social workers.

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Deemed by government officials as “essential workers” but paid far less their healthcare peers, social workers were literally on the frontline in the battle to save lives, routinely risking their own as they leveraged their expertise to address trauma, grief, rising addiction, mental health breakdowns, and other behavioral health conditions in unprecedented circumstances.

Therapy on sensitive topics such as domestic violence, for instance, had traditionally been done in person due to strict regulations. As rates of suicide, depression, and other mental health conditions began climbing, however, the federal government temporarily loosened regulations to allow states and localities to enable therapy by phone and eventually by videoconference as the latter upgraded to comply with privacy and data protection regulations.

While the media were filled with stories of home-bound people baking bread and rediscovering lost hobbies, social workers were not among them. Indeed, they were overwhelmed with current and new clients in a sky-high climate of crisis. Volunteering for chapter projects or committees was not on anyone’s urgent to-do list. Simple survival of members, clients, and employers took priority.

A Prescription for Recovery

For Riggs, the pandemic presented unexpected opportunities to introduce new chapter services while leveraging NASW benefits that members may have forgotten such as the nationwide MyNASW online community of more than 110,000 social workers, free ethics consultations, and practice standards. But while the latter helped social workers in general, Riggs took steps to ensure her chapters would zero in on the unique needs of Metro DC and Virginia members.

One of her first steps had been to open the nearing Virginia Chapter Annual Conference to include Metro DC members, and she, staff, and a quickly hired technology partner pivoted the in-person event to a virtual conference in less than three weeks. The dramatic move sparked some of the highest attendee satisfaction ratings on record, attracted more than 75 members and potential members from the Metro DC Chapter, and grew general registration to more than 400—well beyond in-person numbers.

In addition to boosting staff skills in online learning management, the supportive conference culture reinforced pride in the profession at a difficult time and trained attendees on emerging COVID-related and self-care topics such as telehealth best practices and journaling. Post-event surveys revealed that registrants also had strengthened their connections to DC and Virginia peers, and more than 94% said they would recommend the conference to colleagues.

Momentum from this and the following annual conferences re-ignited local interest in chapter community-building, networking, and professional development. Riggs further increased visibility and member information-sharing by expanding communications efforts such as a consistent social media presence, a monthly newsletter, a website revamp, targeted emails, and an overall marketing strategy.

She also recruited local instructors for new stand-alone training programs such as a trauma-informed care certificate and developed a joint-chapter professional development calendar to fill the Metro DC Chapter’s gap in customized training.

In addition, Riggs contracted with the national office to participate in its Connect to End COVID-19 vaccine hesitancy campaign, funded by a $3-million grant from the Centers of Disease Control and Prevention. The CDC partnered with NASW, NASW Foundation, and the University of Texas to provide complimentary training that upskilled social workers’ ability to guide clients to informed vaccination decisions and to counter vast misinformation about COVID-19 vaccines. The campaign especially targeted high-risk, low-vaccination populations such as rural residents, older adults, and Black communities—all of which had proven more vulnerable to hospitalization and death than average COVID-19 patients.

Although exact DC numbers are not available, the initiative is credited with training thousands of social workers nationwide and saving countless lives, since clients generally have high trust in social workers and their evidence-based explanations.

Bio Kristin Clarke, CAE, has worked for associations and nonprofits such as the American Society of Association Executives for 35 years in positions ranging from director of communications to executive director. As president of Clarke Association Content in Richmond, Va., she provides communications, marketing, and editorial consulting.

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Kristin Clarke

All of these education-based changes led not only to higher engagement by DC members, but also to significantly improved chapter finances. The organization's budget has grown from $40,000 in 2019 to $275,000 in 2024, plus a $20,000 surplus reserve fund.

Increasing local advocacy was another strategy of Riggs. NASW membership surveys, including respondents to a 2020 Metro DC Chapter survey, identified advocacy as the top reason why social workers joined the organization.

However, at the start of the chapter turnaround, members were not engaged with DC elected officials, City Council issues, or larger NASW policy priorities. Riggs partnered with nonprofits and associations on social justice and professional issues such as gun violence and workforce development, collaborating with City Council to pass legislation such as establishing a master's degree in social work program at the University of DC, changing legal marriage age laws, supporting tougher gun safety laws, and advancing solutions to homelessness and the affordable housing crisis—all top concerns of chapter members.

The organization also began endorsing political candidates who championed its policy priorities, releasing position statements, and creating a Policy and Social Justice Committee to amplify members' voices in legislative strategy development. To keep members abreast of regulatory and licensing actions, Riggs strengthened ties with the DC Board of Social Work and aligned chapter training with license requirements.

She also hired a lobbyist to co-create legislation with partners on workforce development issues such as membership in a Social Work Licensure Compact, which would enable license mobility among compact states.

A Refurbished "Professional Home"

Thanks in large part to the pandemic and its ripple effects, the Metro DC Chapter turnaround has not always gone quickly or smoothly. Riggs acknowledges lingering challenges such as the volatile economic and political climate that can slow legislative progress and distract policy makers. Members, too, remain extraordinarily busy serving clientele in settings ranging from schools and hospitals to corporations and government agencies. Such heavy workloads can sap energy and interest from the chapter's volunteer-driven initiatives or advisory board and committee work. Membership growth, meanwhile, also remains a priority in the year ahead.

However, considering the dramatic worldwide transformation of the past four years, the reversal of fortune for the chapter is an impressive story of resilience, creativity, and leadership, and associations are likely to find lessons in Riggs' actions and vision.

Learn more about NASW Metro DC Chapter at www.naswmetrodc.socialworkers.org

Evolving Association Membership Models

Summary: Association membership models are evolving, moving from traditional, rigid structures to dynamic, purpose-driven, and personalised approaches. Incorporating participation and open models encourages wider engagement. Associations must adapt to changing member expectations, leveraging technology and innovation to remain relevant, impactful, and sustainable.

As associations have evolved over the years, so too have their membership models. These models, once rooted in tradition, are now embracing a wave of transformation driven by technological advancements, changing member expectations, and broader societal shifts. For association professionals, understanding this evolution is crucial to staying relevant, purposeful, and sustainable.

The Historical Context: From Traditional to Transformation

Traditionally, association membership models were simple and often quite rigid. Members paid an annual fee and, in return, received a predetermined set of benefits such as networking opportunities, professional development, access to research, and advocacy support. These tangible benefits were at the heart of membership, creating a clear distinction between those inside and outside the association's fold.

However, as the world has become more interconnected, this traditional approach has shown its limitations. The rise of digital technology, globalisation, and the shifting expectations of members have challenged associations to rethink their value propositions. Today's members are not content with just receiving benefits; they seek deeper connections, personalised experiences, and a sense of purpose. This evolution has given rise to more dynamic, inclusive, and purpose-driven membership models.

The Modern Membership Model: Purpose and Personalisation

At the heart of this transformation is a renewed focus on purpose. Associations are remembering they do not exist merely to recruit and retain members. Instead, they exist to advance a compelling mission. The membership model, therefore, must be designed to powerfully support that purpose.

One of the key elements of a modern membership model is personalisation. Data-driven strategies, powered by technologies such as artificial intelligence and machine learning, allow associations to offer customised content and experiences tailored to individual members' needs. This shift from transactional to relational membership models reflects a broader trend towards delivering more meaningful value and fostering a deeper sense of belonging.

For example, some associations are adopting hybrid models that blend traditional in-person experiences with virtual offerings. This approach allows for greater flexibility and accessibility, making it easier for members to engage regardless of their location. Similarly, the focus on lifelong learning has become a cornerstone of modern membership models, with associations offering continuous professional development opportunities through diverse educational resources and certification programs.

Building a Future-Ready Membership Model: Key Elements

To build a future-ready membership model, associations must carefully consider several key elements that form the foundation of their membership strategy. A full overview of these can be found in my whitepaper “Evolving Association Membership Models”. Membership model considerations include:

Purpose

Purpose is the cornerstone of any membership model. It defines the positive impact the association seeks to make in the world and serves as the guiding principle for all activities. A well-defined purpose helps associations stay focused and aligned with their mission, ensuring that their membership models support the organisation's goals.

Audience and Engagement

Understanding the audience is critical to creating a membership model that resonates. Associations must define who they serve, how they engage with members, and what value they provide. This involves segmenting members based on factors such as professional background, career stage, or personal interests and delivering tailored experiences that meet their unique needs.

Operational Frameworks

The operational frameworks of an association determine how it delivers value to its members. This includes the principles that guide decision-making, the functions the association performs (e.g., mobilisation, representation, community-building), and the categories of membership that structure the relationship between the association and its members.

Value and Sustainability

A compelling value proposition is essential for attracting and retaining members. Associations must clearly articulate the benefits they offer and ensure that these benefits align with members' needs. Additionally, financial sustainability is a critical consideration. While membership fees are a key revenue source, associations must diversify their revenue streams to ensure long-term stability.

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Bio With over 30 years' experience, Belinda specialises in researching association trends and integrating them into strategic plans that drive results. Her deep understanding of the not-for-profit sector and AI's potential enables her to craft strategies that address emerging trends and challenges, delivering tangible outcomes and a future focused approach.

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Shifting Towards Participation and Open Models

One of the most significant trends in association membership models is the shift from traditional models toward participation models, with an eye toward open models. Associations are increasingly viewing membership as a continuum rather than a static concept. At one end of this continuum are traditional models, where members pay for access to specific benefits or a limited community. On the opposite end lie open models, where anyone can engage with the association, often without the need for paid membership.

The participation model represents the middle ground on this continuum. It opens the door to broader engagement by allowing non-members to access certain benefits or participate in association activities. While members still enjoy premium benefits, non-members can engage with the association in a more limited way, creating a welcoming environment that encourages them to eventually become full members. This model fosters inclusivity and allows associations to build stronger relationships with a wider range of stakeholders.

Moving further along the continuum, open models remove barriers entirely, allowing everyone the opportunity to engage freely with the association. In this scenario, financial membership may still exist, but it is no longer the gatekeeper to participation. Instead, associations generate revenue through events, sponsorships, donations, or other channels, while focusing on creating a broad, engaged community.

The journey from traditional to participation to open models reflects a fundamental shift in how associations view their role in serving their industry or cause. Rather than limiting engagement to paying members, associations are recognising that their purpose may be better served by embracing a wider audience. This requires a re-evaluation of value propositions and a commitment to delivering benefits that resonate across different levels of engagement.

For association professionals, understanding this continuum is key to crafting a membership strategy that is flexible, responsive, and relevant. Whether transitioning towards a participation model or moving towards an open structure, associations must carefully balance the need for inclusivity with the financial realities of sustaining their operations.

The Road Ahead: Embracing Change and Innovation

As associations navigate the challenges of staying relevant and financially stable in an increasingly digital world, it is clear that the traditional membership model is no longer sufficient for many associations. To thrive in the future, associations must embrace change and innovation, rethinking their value propositions and finding new ways to engage with their members.

This means moving beyond the transactional approach to membership and focusing on creating a deeper sense of belonging and purpose. It also means leveraging technology to deliver personalised experiences, fostering community, and aligning activities with broader social goals.

For association professionals, the key to success lies in being proactive and forward-thinking. By continuously reassessing their membership models and adapting to the changing needs of their members, associations can ensure that they remain relevant, impactful, and sustainable in the years to come.

The evolution of association membership models is a reflection of the broader changes taking place in society. As members' expectations shift and technology continues to advance, associations must be willing to adapt and innovate. By focusing on purpose, personalisation, and participation, associations can build future-ready membership models that deliver real value to their members and support their mission for years to come.

For association professionals, the challenge is clear: embrace the future, harness the power of data and technology, and create membership models that are not only sustainable but also deeply meaningful to the people they serve.

Visit www.smsonline.net.au to download the whitepaper *Evolving Membership Models*.

Unpacking the 2024 Association Engagement Index: A Path to Deeper Connections

Summary: The 2024 Association Engagement Index highlights the importance of personalisation and guiding members through the "Engagement Loop" (Consume, Contribute, Collaborate, Co-Create). By leveraging technology and offering targeted opportunities, associations can deepen connections and boost active participation from members.

For more information and to download the full 2024 Association Engagement Index report please visit www.mci-associationengagement.com.

In an ever-evolving world, the strength of relationships and engagement within associations has never been more crucial. The 2024 Association Engagement Index (AEI) by MCI reveals fascinating insights into how associations can better connect with their members and customers. With responses from over 15,800 individuals across 58 associations globally, this study sheds light on the dynamics of engagement and offers a roadmap to fostering more meaningful interactions.

The Engagement Loop: A New Framework for Connection

At the heart of the AEI findings is the "Engagement Loop," a powerful model that highlights four key modes of engagement: **Consume**, **Contribute**, **Collaborate**, and **Co-Create**. These modes represent a continuum of involvement that members experience with their associations. The data reveals that while a significant portion of members are consuming content (a passive engagement), far fewer are contributing to or co-creating with their associations.

This gap presents an incredible opportunity for associations to not only engage but also empower their members to move from passive consumers to active co-creators of content and strategy. Imagine the impact of a member, initially attending webinars or reading newsletters, gradually evolving into a thought leader within the community.

Leveraging Technology and Data for Personalisation

One of the standout insights from the AEI is the importance of personalisation in enhancing engagement. As associations begin to harness technology, data, behaviour analytics, and member preferences, they can deliver more relevant content and experiences. However, this personalisation isn't always consistently applied across all channels, such as newsletters, websites, and learning platforms. Moreover, not all members are aware of how to personalise their own experience, indicating a need for associations to guide them more effectively.

Members could be situated anywhere on the Engagement Loop at a given time in their relationship with the organisation. If associations consciously track these modes of engagement, they can target communications to direct members toward other opportunities. For instance, if a member has actively contributed by presenting at a conference, the association should proactively guide them towards opportunities to collaborate in task forces or co-create in strategic planning.

Creating a Culture of Engagement Through Personalisation

Associations can further encourage active engagement by guiding members and customers on how to get involved through targeted, deliberate, and personalised communications. This could include personalised invitations to contribute to specific projects or collaborate on new initiatives. Additionally, providing more agile and quick opportunities for engagement, such as short-term task forces or project-based committees, allows members to engage on their terms.

These opportunities should cater to the desire for multichannel engagement through both online and offline touchpoints throughout the year—what we might call "Engagement 365."

Bio Cindy-Lee leverages her operational event and association management experience in a business development and consulting role at MCI to ensure optimised engagement and maximising revenue generating opportunities for associations.

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Key Drivers and Recommendations for Enhanced Engagement

The 2024 AEI highlights several key drivers that associations should focus on to enhance engagement:

The 3Cs of Engagement: Choice, channels, and customisation (as highlighted in the 2022 AEI) remain critical. Members want to choose the right channel for the right activity and customise their journey to find relevant content easily.

Advocacy, Loyalty, and Brand Promotion: These vary greatly by age. Those under 55, who are crucial to the future of associations, are less likely to recommend their association, requiring targeted engagement tactics.

Content Consumption: A significant 53% of respondents' time spent interacting with associations is dedicated to consuming content—a passive, solo activity.

Based on these insights, MCI recommends that associations:

Optimise, monitor, and ***structure*** engagement opportunities around the four modes of the Engagement Loop.

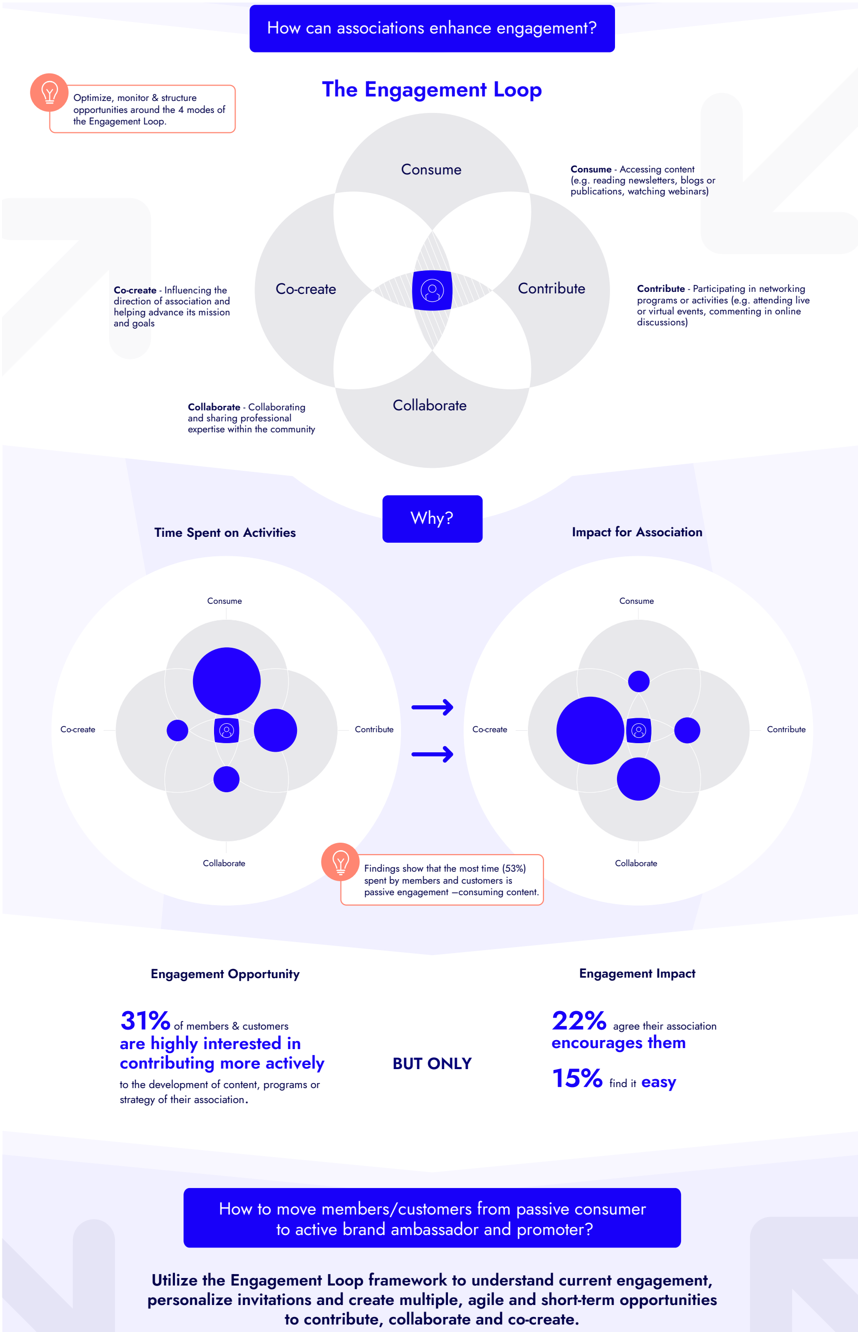
Present multiple opportunities for ***agile, flexible, multichannel***, and ***short-term*** engagement.

Regularly invite members to contribute, collaborate, and co-create.

Design events that ***capitalise on in-person touchpoints*** by offering various opportunities and formats for contribution, collaboration, and co-creation.

Personalise communications to guide members and customers towards targeted modes of engagement.

By adopting these strategies and focusing on personalisation, associations can build deeper, more meaningful relationships with their members, paving the way for a more engaged, vibrant community.



What's a Competitive Advantage and Why Do You Need One?

Summary: A competitive advantage distinguishes your association, enhancing member recruitment, retention, and satisfaction. Regularly reassessing this advantage based on member needs is crucial for long-term success. Texas Nurse Practitioners demonstrated how leveraging competitive differentiation drives growth and strengthens organizational impact.

Competitive advantage is a condition or circumstance that puts a company (or association) in a favorable or superior business position. In her book Creating Competitive Advantage, Jaynie Smith writes, "It answers the customer's key question: Why should I do business with you? What are you offering that the other guy doesn't?" This is a question that all associations must answer—and one most don't spend enough time on.

Smith also writes, "For most companies, large or small, a competitive advantage is rarely unique and not often sustainable over an extended period of time." (Italics mine.) In other words, if you're still promoting benefits identified in a different time period or market, you may be competing with less important or irrelevant offerings. And if you are, that's a competitive disadvantage. An excellent example of this is Southwest airlines, which recently announced it will discontinue open seating—a hallmark of the airline for more than 50 years. (It's keeping its "bags fly free" differentiator, however.)

When I ask association professionals to identify their biggest challenges, articulating a strong value proposition for their association is usually among them. Why? Because developing a succinct, memorable and meaningful value statement takes a lot of work and many don't know how to do it. But the dividends are worth it. When Jaynie Smith worked with the Visiting Nurses Association of Florida to identify its competitive advantages, the organization broke records by increasing its revenues 40 percent within months.

A strong competitive advantage isn't just about revenue, however. (But who doesn't like that?) It makes member recruitment and retention easier and raises member satisfaction. Together, these strengthen associations and create sustainability.

Here's what you need to know about competitive advantage:

- To differentiate your organization, you have to identify and understand who is competing with you for your members' time, attention, money and engagement.
- If you have different member segments (i.e. varying career stages, affiliates or both individual and company members), you'll need a competitive advantage(s) tailored to each segment.
- Value is what your members say it is; not simply what staff thinks it is. The strongest competitive advantages come from deep listening and reflect what you've heard from your members. (In regard to open seating, Southwest Airlines' research showed that 80% of its customers and 86% of potential customers prefer an assigned seat. Of course, the potential for more profit but charging for premium seats was also a driving factor.)
- Identifying your competitive advantage takes work and since it is not sustainable forever (as noted above), it has to be regularly checked and reworked as changes happen in your market or sphere of influence.

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Bio Mary Byers CAE, CSP is the author of Race for Relevance: 5 Radical Changes for Associations and Road to Relevance: 5 Strategies for Competitive Associations. She's a sought-after facilitator, association advisor and CEO coach.

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How do you create and communicate a competitive advantage? Melynn Sight offers seven steps in her book, Breakthrough Value: Discover Your One-Of-A-Kind Value Proposition:

Brainstorm, then target your audience.

Listen to their words and prioritize their needs.

Link their needs with your expertise.

Compose your proof points and draft your theme.

Complement your words with graphics.

Develop your launch plan.

Launch.

Though I don't think you should circumvent the work above, here are key questions that will help you identify your competitive advantage(s):

- How do you help members work less stressful, and more profitably and more productively?
- What do you do for members that they can't do for themselves?
- What problem(s) do you help members solve?

If you can't answer the above questions, you likely have a weak (or non-existent) advantage. And if you are able to answer these questions, how can you communicate the answers in a succinct and memorable way? Having a strong competitive advantage is one thing. Being able to communicate it quickly and powerfully is another.

When faced with a membership plateau, the Texas Nurse Practitioners (TNP) recognized that enhancing their marketing and communications alone wouldn't address a weak value proposition. They needed to improve their competitive differentiation as well. Aided by Elizabeth Bailey of 2B Communications and Strategy Group, the organization started by digging deeper into member data and research, understanding the competitive landscape and figuring out where it had opportunities to position itself uniquely among Texas nurse practitioners. From there, they built a multi-pronged approach.

The result of TNP's work is noteworthy. Registrations for the annual conference increased more than 25% (with 40% being first-time attendees) and membership increased nearly 5% overall, proving the essential role data and competitive intelligence play in strengthening member value propositions and creating compelling brand positioning. According to Emily Eastin, TNP CEO, "The insights we gained into our competitive advantages and what drives members to join and stay have led to significant bottom-line results and we are surpassing our previous membership levels. The process has energized our board and staff and created momentum that is having a positive impact across our organization."

This mirrors Jaynie Smith's assertions that "if you properly identify and exploit your competitive advantage, it will impact your bottom line early and often."

According to Smith, "…no matter the size of your company or the kind of business you are in, your competitive advantages should be the foundation of all your strategic and operations decisions. Ignoring them can be an expensive and even fatal mistake. And who wants that?

What's your competitive advantage? How is it reflected in your value proposition? If you can't answer these questions, you've got some work to do! It will take time, effort and money. But as the Texas Nurse Practitioners discovered, the results will be worth it.

Defining Your Association's Value Proposition

Summary: Many associations struggle to clearly articulate their value proposition, hindering recruitment efforts. A well-defined value proposition, emphasizing relevance, quantified benefits, and differentiation, is essential. Associations can develop this through market testing, analyzing member behavior, or conducting comprehensive research.

Several years ago, I facilitated a planning meeting to help a new client facing a decline in membership. The leadership was eager to start and brought in their field staff for the meeting. After the customary introductions, we got down to business. My first question was, "What value proposition encourages prospects to join your association and later renew?" The response was silence and then a recital of membership features – networking, a magazine, and discounts. The membership team struggled to articulate the specific value that the association delivered.

This association's lack of a defined value proposition was a critical factor keeping it from standing out in its market. Potential members often chose a competing group.

Unfortunately, the situation I encountered with this organization is not isolated. Many associations are grappling with the challenge of understanding and communicating the value they provide. The results of our most recent Membership Marketing Benchmarking Report are sobering-only 13 percent of associations believe they offer their members a "very compelling" value proposition. And when asked why they think members do not join, 66 percent of benchmarking respondents confess, "They don't see the value of membership."

These research results highlight the challenges associations face with fully understanding and articulating their value proposition.

It's important to note that the perceived absence of a compelling value proposition does not diminish the value that associations provide to their members. Most associations offer tremendous value to their members. We know this because members continue to pay dues year after year – the median association-wide renewal rate is 85 percent. Members only spend their hard-earned dollars if they see a commensurate return. The question is not whether or not associations provide value. It is how effectively associations understand and communicate that value.

Here is the challenge with undefined value. Yes, most existing members renew because they have *received* their desired value – perhaps by discovering it through their own efforts. However, non-members have yet to receive value. Instead, they join because of the *perceived* value they will get. And how they perceive value comes from your association's ability to communicate your value. Not understanding and communicating the value your association delivers may not hinder the retention of members, but it seriously hampers membership recruitment efforts. Defining and then communicating your association's value proposition removes a significant barrier to acquiring new members and is a foundational pillar for growth.

Strategies to Define Your Value Proposition

Since a value proposition is critical to an association, what are the best ways to establish a powerful message?

First, let's define what a value proposition is not. It is not a list of features of everything an association offers. Instead, a value proposition concisely describes the unique benefits and advantages an association offers its members. It outlines what members can gain by joining and participating in the association.

Specifically, the value proposition will include the following components.

- **Relevancy** – Addressing how the association's offerings meet its target members' needs and interests.
- **Quantified Value** – Demonstrating the tangible benefits members receive.
- **Differentiation** – Highlighting what sets the association apart from other similar organizations.

Let's look at several methods to identify these elements of the value proposition.

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Tony Rossell

Market Tested Value Proposition

The first option is the most straightforward method for uncovering your target market's response to your value. You can determine the optimal value proposition through market testing. This method allows prospects to effectively vote with their dollars on what value best meets their needs.

Here is how a financial services organization put this into practice. They maintained a high renewal rate and were growing, but they were not confident they were optimally presenting their value. So, they created seven different messaging platforms based on their view of what motivated their members. They then tested those messages through online ads and email to determine the most motivating. Through the testing, one variation came through most strongly, and that became their core message to the market.

This method allowed them to refocus their marketing communications with real data from prospects quickly. They could now go to market with an updated value proposition in a matter of weeks.

Behavior-Driven Value Proposition

The second method to focus and enhance your value proposition is to analyze the data you may already have. This method explores your members' interactions with your association. Opportunities include reviewing your website analytics, event attendance records, engagement on social media, and other member activities. What are members reading, talking about, and buying? This review will provide valuable guidance into member behavior and preferences.

This analysis can include a competitive analysis. In addition to the feedback you receive from your review of your products and services, you can look at competing organizations to analyze what unique resources, programs, or opportunities your association provides that others do not.

Market Research Value Proposition

Finally, market research is the most comprehensive tool for clearly defining your optimal value proposition. Research can range from simply interviewing members to more sophisticated methods like conducting focus groups or running an in-depth quantitative survey. For example, executive interviews allow you to gather data and testimonials demonstrating the tangible outcomes members have achieved through their association membership. Additionally, focus groups and quantitative surveys can assess whether the association's benefits directly address these needs. Research areas of inquiry can include:

- Asking what products and services are critical and how well your association delivers them.
- Defining how the resources solve specific problems your members face.
- Gaining insights into the decision-making processes of why someone will join and renew.
- Gathering feedback about competitors and how your association can differentiate your offerings.

Presenting a clear, compelling, and exclusive value proposition is foundational to effective membership marketing. With your value proposition in hand, you now can provide proof that you can deliver on your promise. You can support your value proposition by offering case studies, testimonials, stories, and competitor comparisons.

This article is an edited excerpt from the forthcoming book, *The Seven Deadly Sins of Membership Marketing*.

I've Got a Hundred Million Reasons To Walk Away - But Baby, I Just Need One Good One To Stay

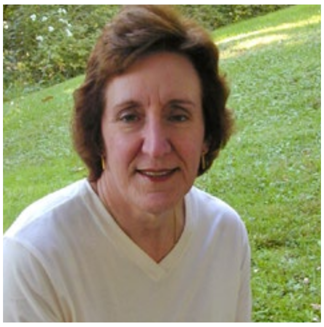
Summary: Association members join for one key reason, and that same reason often drives them to leave. Each individual's motivation varies—be it money, mentorship, or safety—and associations must continuously listen and adapt to these evolving needs. Failing to do so leads to disconnection.

Look at any association website and it's overloaded with offerings, opportunities, features, benefits, discussion groups, publications, courses, certifications, and many ways to spend your time and money. It's a mass blast of overwhelm and a shotgun of noise and information overload, which sort of worked in 1960.

After 42 years as a pioneer in association consulting, I had to walk away. In all that time, I discovered there is ONE reason why anyone joins or works for an association and that is the same reason they leave you.

The purpose of this article is to provide wisdom you might use to decide whether to stay or leave your association life. If you stay, then use it to understand the absolute truth, stripped down to the core, about why anyone wants to work for an association or why anyone wants to join an association. Then, when you need to exit or want to do something about the members who leave you, look at this again.

My authority and wisdom come from decades of experience, great triumphs, devastating losses, lessons, and confidential conversations gained in more than 2000 all-day meetings across the past 40 years for the boards of directors, executive committees, strategic planning workshops, certification business building retreats, and week-long immersion experiences called conventions, expositions, and transformative learning communities.



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

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The Reason They Come to You is The Same Reason They Leave You

The relationship between the individual and an association starts as a strange romance and it starts to fall apart when the individual becomes stronger and the association fails to treat people individually.

Early in a career that took me into the trust and assignments with 600 associations was a five-year relationship as a growth consultant for the Society for Human Resource Management. Their members are in charge of attracting, training, keeping, and exciting human talent for companies, large, small, private, and public. One senior certified human resource executive for a billion-dollar corporation and member of SHRM taught me this: **Decades talking with thousands of applicants and employees have taught us to find out the reason—the one, most important reason, why they want to work here is the exact reason why they leave.**

If the reason is money, then they will suffer through everything else as long as the money is right. If the reason is the need for a professional mentor who believes in them, all other factors do not matter as much. If the reason is the need for safety that comes with participating in a tribe, then anything that makes them not safe will cause them to flee and seek safety elsewhere.

Like so many gems of wisdom gathered from thought leaders in every profession and industry, **that one stuck with me.** What if it is true for every business? What if it's true for every online community? What if this is what associations are missing in their intentions and strategies?

The list of The One Main Reason is as long as the number of people in your organization because **there is no one size fits all**. On the plus side, systems and technologies help us listen, remember, and align all of our actions and communications with that one, most important reason for each person. AI for example is essential for mass customization of email, which means no two members should ever get the same email and **everything** speaks to what you have learned in the relationship—**not just their name**.

The Biggest Lie in Associations is They Know Their Members

In recent years, the importance of understanding and engaging customers has become paramount across all business models, including associations. The focus has shifted to deeply learning who the customer is, listening intently to their needs, and capturing data at every interaction. This approach leverages both human insight and AI technology to enhance the customer experience by identifying and responding to evolving preferences and priorities. By meticulously tracking changes in customer desires and choices, organizations can stay ahead of trends, ensuring that they meet customer expectations precisely. This shift underscores that success in today's market requires a proactive, data-driven approach to customer service, where continuous learning and adaptation are key.

The one reason for the relationship for each person can change with the transitions in their life. That's why sophistication is both high and necessary for customer listening, remembering, and acting swiftly on what the customer tells you. Just like a heart monitor or diabetes monitor, the association that has not figured out the critical nature of monitoring the continuous feed of data and the dialogue with each person—that association may already be in deterioration.

Building a Strong Foundation: The Role of Data Cleansing in Association Success

Summary: Data cleansing is vital for associations, ensuring accurate member information to boost engagement and maintain success. A clean database supports effective communication, enhances campaigns, and improves revenue. Regular audits, surveys, and data management policies are essential tools for keeping member records updated and relevant.

Data holds a lot of power - providing you with the right information to best engage, manage, and maintain successful contact with your members. However, these benefits can only be achieved if your database is clean, well-organised, and fully up to date with all the relevant information. If it's been a while since you last gave your database a thorough check, it's important to run data cleansing campaigns to ensure that your members' details are complete with all the current information - allowing you to better serve your members' needs. This provides your Association with the strong foundation it needs to make significant adjustments such as transitioning to a new CRM and, most importantly, better engaging with your members.

The Importance of Data Cleansing

It's not uncommon for a membership database to fall into a state of disrepair. According to census data, more than 40% of Australians move home at least once every five years, not to mention changes in phone numbers, email addresses, and names due to marriage or divorce.

If your Association is migrating to a new CRM, there's a strong chance that your database needs cleaning. Lapsed members, duplicate records, and outdated contact details can muddy the waters, creating a shaky foundation for your services. It's hard to engage your members effectively if you don't have the correct details. It's also important to note that the membership landscape is evolving. According to the Marketing General 2024 Membership Marketing Benchmark Report, Gen-Z members increased from 9% in 2023 to 11% in 2024, while Gen-X and Baby Boomers saw a decline. This balancing of demographics means that associations must not only understand the changing needs of their members, but also ensure their data is accurate and up-to-date to maintain effective communication across all age groups. A clean, accurate database allows for targeted, high-performing campaigns, ensuring your messages reach the right members, improving engagement and boosting membership renewals.

Conducting Effective Surveys

According to the Marketing General 2024 Membership Marketing Benchmark Report, "Associations reporting increases in their five-year membership numbers are more likely to conduct regular member surveys than those reporting declines." Surveys are a powerful tool for engaging with your members, gaining insights into their needs and experiences, and ensuring your association remains aligned with their expectations. However, for surveys to be truly effective, having clean and accurate data is essential.

If your contact details are outdated or incomplete, your survey responses will likely suffer, limiting your ability to gather meaningful insights. That's why it's crucial to maintain a clean database from the start—one that includes both work and personal contact details, where relevant. But here's the good news: surveys can also be an opportunity to update and clean your data. By including data verification questions within the survey, you can capture updated information, ensuring that your records remain accurate.

This circular process — using clean data to conduct effective surveys and using those surveys to further clean and update your database — creates a strong foundation for ongoing engagement and higher membership renewals. Ensuring your data is up-to-date throughout the survey process strengthens your ability to reach and resonate with all members, ultimately leading to more impactful campaigns and sustained membership growth.

Bio Angela McDonald is the CEO of Optimum Contact, with 20 years of experience in the call centre industry, focusing on membership-based organisations. Angela is dedicated to developing engagement strategies that ensure members feel valued, foster stronger connections, and support associations in building long-term relationships with their communities.

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Angela McDonald

How Data Drives Engagement and Revenue

A clean database is more than just having the right member contact details in place. It also improves member engagement, helping your association effectively communicate with the people who matter the most. By using clean membership data to tailor interactions and provide value-added services, your association can boost member retention and your overall revenue. Insight into members' interests and participation history enables associations to anticipate their needs and proactively address concerns, fostering lasting relationships.

Every member is going to respond better to certain engagement campaigns than others. According to the research gathered from the Marketing General 2024 Membership Marketing Benchmark Report, 60% of the surveyed respondents responded well to ongoing monthly engagement emails, while only 43% engaged with invitations to follow their association's social media pages.

These statistics matter when cleaning your database, as they reflect the need for a comprehensive understanding of your member's preferred communication channels and their behaviour relating to varying engagement methods. With accurate and up-to-date member data, you can make informed decisions on where to invest your resources - email, social media, call campaigns, text messages and more.

Clean Your Membership Database

A strong, clean database is the cornerstone of effective stakeholder and member engagement and revenue growth. Here are some tips you can rely on to help clean out your member database:

- **Conduct regular audits** of your database, breaking it down into bite-sized segments so you can better examine its overall health.
- **Conduct surveys**, verification questionnaires, and implement other communication touchpoints to ensure your records are up-to-date and relevant, while also keeping an ongoing dialogue with your members, prospective members, and other stakeholders.
- **Categorise members appropriately** in your database (eg: past members, members, never members) to ensure they are receiving the right communications. Your database, structured right, contains all your stakeholders and enables people to easily transition from one to the next.
- **Implement a data management policy** to guide and train all your employees in best practise use of your Association's database and on-going data hygiene. From learning standardised formatting to understanding the importance of segmentation and analysing data, such a policy should be implemented by any Association with a sizable database.
- **Cleanse your data** by investing in tools and training that will enable you to better comprehend the needs of your members. Or better still, outsource this work to trained professionals who will give your database the cleanout it needs.

At Optimum Contact, our data cleansing service ensures your association is equipped with accurate, up-to-date information, empowering you to make informed decisions, strengthen member relationships, and achieve long-term success.

Communicating and Advocating in a Complex Political Landscape

Summary: Engaging with the political landscape requires strategic timing, understanding parliamentary schedules, and building long-term relationships. By combining data with human stories, leveraging media, and maintaining regular communication, organisations can influence policy, navigate shifting political environments, and create meaningful impacts with government stakeholders.

While this article focuses on the intricacies of the Australian political system, the strategies and considerations outlined are universal for anyone engaged in advocacy. The following insights, tailored to the Australian context, offer valuable lessons for advocates working within any complex political landscape.

Engaging with government and influencing policy can be challenging, whether you're advocating for a cause, seeking funding, or lobbying for legislative change.

Australia's political system is complex, with a federal structure that involves multiple layers of decision-making and numerous stakeholders, with a dynamic interplay between government priorities, political agendas, and public opinion.

To effectively engage with government officials, you need more than a solid case. It requires a keen understanding of political cycles, parliamentary procedures, and the interests of various players.

Here are some key strategies to help you make an impact in the Australian political context.

Seizing opportunities in a shifting political landscape

Timing is everything in politics. As at September 2024, early polling indicates a likely Labor win, possibly leading to a minority government, the political landscape offers unique opportunities for organisations seeking government support.

By nature, a minority government is more responsive to diverse stakeholders, as it requires building consensus and negotiating with a broad range of voices. This environment can provide your organisation with greater leverage if you approach it strategically.

To make the most of this opportunity, start by scheduling meetings as early as possible. As the election approaches, ministers and key leaders will become increasingly busy with campaign activities. By securing a meeting well in advance, you'll have a better chance to discuss your issues before their schedules become fully booked.

Being proactive and early in your approach ensures that your organisation's needs and messages are considered before the political focus shifts entirely to election-related matters. This timing can help you engage with decision-makers when they are still open to new ideas and input.

Bio As a leader in the for-purpose and social impact sector, and one of Australia's most sought-after strategic communications and engagement advisors, Jo Scard leads Fifty Acres with over thirty years of experience in public relations, political advisory, and project management. Jo played a unique role as a senior adviser to the Rudd and Gillard Governments, managing complex Senate negotiations across all portfolios.

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Jo Scard

Understanding parliamentary schedules

Knowing how parliamentary schedules work can significantly improve your chances of success. Ministers are typically very busy before Question Time (commencing at 2pm).They handle urgent matters, and may be caught up with last-minute issues.

To ensure you can have a productive meeting, try to schedule it after Question Time, ideally around 3:30 pm or later, when Ministers might have more time to engage.

It's also important to be aware that divisions, or votes, are regularly called in both the House of Representatives and the Senate. These votes can interrupt your meeting unexpectedly. To make sure your key points are still conveyed, bring along an information sheet or flyer. This way, if your meeting gets cut short, the minister or their staff will have a summary of your main messages they can review at their convenience.

Engaging regularly and meaningfully

Lobbying isn't just about making a pitch for your ask—it's about building long-term relationships. Begin networking early, and ensure key stakeholders are involved in your conversations. Regular meetings, continuous communication, and thoughtful interactions ensure that your issues remain visible.

To maintain and strengthen these connections, consider sending out thought-leadership articles, providing infographics to relevant ministers, and arranging regular meetings for open and honest discussions. Being consistent and genuine in your engagement helps build trust and increases the influence of your organisation over time.

The power of data and human stories

In a competitive environment where many organisations are vying for attention, being well-prepared and data-driven is really important. Ensure your messaging is clear and backed by solid data that appeals both emotionally and practically. Supporting human stories with evidence, especially those relevant to the member's electorate, can make your message more engaging and persuasive.

Whenever possible, when meeting with government officials, invite individuals who benefit from your organisation's work to join. Their personal stories can add a powerful, relatable element to your advocacy, making your case more memorable and impactful.

Leveraging media to shape public opinion

Politicians are often influenced by public opinion, making media engagement a key part of your strategy. When you use the media to raise awareness about your cause, you create public pressure that can impact decision-makers.

Start by sharing your story through various media channels. Press releases, articles, and social media posts can help spread the word and highlight why your cause matters.

Lastly, take advantage of public platforms such as interviews, opinion pieces, guest appearances on podcasts and radio shows. These opportunities allow you to reach different groups of people and reinforce your message from various angles.

By approaching government relations with strategic timing, thorough preparation, and sustained engagement, you can effectively influence policy and achieve meaningful outcomes for your organisation and the communities you serve.

The Relevance of Associations in an AI Powered World

Summary: Associations face a pivotal moment in an AI-powered world. To remain relevant, they must strategically adopt AI, streamline operations, and guide their members through AI's impacts. Success lies in leading with vision, integrating AI into daily functions, and fostering staff adaptation.

From the dawn of human civilization, people have sought collective action to achieve goals beyond individual reach. This primal instinct birthed associations - groups united around a shared purpose. While the structures of these groups have evolved over time, the core human desire to collaborate remains constant.

Today, associations face an unprecedented challenge: adapt or risk irrelevance. The rise of artificial intelligence (AI) offers a game-changing opportunity for associations to solidify their relevance, but it requires a willingness to evolve. As AI continues to reshape the world, associations find themselves at a crossroads, balancing the weight of tradition with the momentum of innovation.

AI is not a fleeting trend; it's a paradigm shift that will touch every industry, every profession, and every association. The associations that succeed in this new era will be those that embrace the future with open arms, using AI as a tool to enhance their work and drive positive change in the world.

In this rapidly transforming landscape, associations have a dual responsibility: to evolve their internal operations while guiding the sectors they represent through the AI revolution. Those that seize the opportunity to lead in this space will position themselves at the forefront of progress, while those that resist change may be left behind.

AI: A Dual Opportunity for Associations

To thrive in an AI-driven world, associations must excel in two critical ways.

1. They must use AI to enhance their internal operations and position themselves to advance their purpose operationally.
2. They must lead the way in helping the industries and professions they represent navigate the challenges and opportunities AI brings.

Failing to act on either front could result in members and industries seeking alternative ways to connect and grow.

The Three Critical Levels of Adaptation

Associations are about people uniting to advance a shared purpose. While AI won't replace the need for collective action, it will disrupt how associations operate. To stay relevant, associations must embrace AI at three levels: strategically, operationally, and individually.

1. Strategic Adaptation

At the strategic level, associations must become visionaries, anticipating how AI will reshape not only their internal structures but also the sectors they serve. This foresight is crucial. It requires leadership teams to ask essential questions:

- How will AI reshape our industry or profession?
- What opportunities and threats does AI present to our association's mission?
- How can we position ourselves as leaders in the AI conversation?

Answering these questions will help associations clarify their role in an AI-powered future. Rather than resisting change, associations should actively seek opportunities to integrate AI into their long-term vision, becoming pioneers in their fields.

Guiding the sectors they represent is a key part of this strategic adaptation. Associations don't operate in isolation—they are the backbone of entire industries and professions, and AI's impact will be different for each. While some sectors may see significant benefits, others may face disruptions. **Associations must be prepared to help their members navigate these changes.**

For example, an AI can read an X-ray at least 400% more effectively than a human. As a result, radiology manufacturers are embedding AI into their machines. This is great news for hospitals – they will achieve enhanced accuracy, better health outcomes for patients, and lower workforce costs as they will need fewer radiologists. The health industry will benefit. Yet the impact on the radiology profession could be dire.

Associations representing those professionals must be ready to advocate for their members and address the challenges that come with such advancements.

To effectively guide their sectors, associations must:

Understand the Potential Impact: Assess how AI will affect their sector, whether through increased productivity or job displacement. This understanding will help associations provide meaningful support.

Address Immediate Challenges: As AI adoption accelerates, associations should help their members build AI-related skills and adapt to new technologies, ensuring they remain competitive in their fields.

Proactively Shape the Future: Rather than simply reacting to changes, associations should work to influence AI's future within their sectors. This could mean advocating for ethical AI use, lobbying for industry regulations, or developing standards that protect their members.

Demonstrate Leadership: Associations that lead by example will inspire their members and demonstrate the practical value of AI, solidifying their role as thought leaders in the space.

Bio Powerhouse duo Julian and Belinda Moore work with associations across the globe to enhance their capabilities and boost impact. Julian's extensive experience helping associations to produce profitable partnerships and raise millions of dollars each year has been eclipsed by demand for his AI skills. Belinda's decades of research and experience gives her a deep knowledge of association trends and membership models and provides context and insight to develop strategies.

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2. Operational Adaptation

Once the strategy is clear, the next challenge is turning vision into action. Operationally, associations must take tangible steps to embrace AI in their everyday functions. This can start with small, manageable applications that support specific areas, such as:

Automated Reporting: AI can streamline data analysis and report generation, allowing teams to focus on strategic decisions rather than the tedious task of data crunching.

Event Planning: AI can help predict attendance, optimise event schedules, and personalise attendee experiences based on data from past events.

Personalised Communication: AI tools can craft tailored messages for individual members, ensuring they receive relevant content that resonates with their interests.

Access to Insights: Using AI to allow staff and/ members to interface with large volumes of information (eg: legislation, reports, webinars, financial systems, databases) to generate answers to specific questions.

AI implementation should be treated as a journey rather than a one-off project. As associations experiment with AI, each success becomes a stepping stone to broader applications, pushing the organisation forward on its AI journey.

3. Individual Adaptation

At its heart, an association is about people. And if people are the soul of the association, then staff and volunteers are the glue that holds everything together. AI adoption cannot happen without their buy-in.

Associations must support their teams in adapting to AI by demystifying the technology and offering accessible training. Empowering staff to use AI effectively will not only enhance productivity but also transform skepticism into curiosity. AI upskilling can include:

AI for Communication: Staff can use AI tools to draft personalised emails, improving member engagement and making communication more efficient.

Streamlining Research: AI can convert complex reports into easy-to-understand summaries, making research more accessible to all team members, regardless of technical expertise.

Social Media Content: AI can assist in creating trend-driven social media posts, helping associations maintain visibility and relevance in the digital world.

By investing in continuous learning and creating a culture of experimentation, associations can ensure their teams are AI-fluent and ready to leverage technology for the organisation's benefit.

Together, We Are Stronger

"AI is an Everything, Everywhere, All at Once scenario." Emad Mostaque, Stable Diffusion Founder and one of the founders of AI.

Emad Mostaque makes it clear that the transition to an AI-driven world is a shared global journey, This is very much the case for associations globally. The challenges and opportunities of AI are not unique to any single association or sector. This journey is being shared by associations across the globe. This fact underscores the imperative for associations to act collectively. By sharing insights, resources, and strategies, associations can amplify their impact, crafting a future where technology serves humanity's broadest goals.

Conclusion: Shaping the Future with AI

As we stand on the brink of the AI revolution, associations have a unique opportunity to shape the future. Associations that embrace AI will not only thrive but will become the driving forces of progress, innovation, and collective action in the 21st century and beyond.

AI Pioneers – 6 early adopters leading the charge

Summary: This article highlights six associations pioneering AI to streamline operations, enhance member experiences, and accelerate growth. From automating board minutes to personalising outreach, these examples show how AI transforms processes, saving time and enabling expansion. Associations are encouraged to embrace AI-driven innovation.

There has been so much talk of AI since ChatGPT captured the imagination when it was released in November 2022. For most though, that's all it's been – talk, and for those that have stepped forward, most haven't looked beyond ChatGPT or simple online tools and are using them without a clear purpose.

But there's a select group, a group of AI pioneers who not only took that first step but a giant leap into what is possible when you want to embrace this head first.

Most importantly, they saw that AI could improve the quality and outcomes of their purpose-driven mission, and not dilute it.

1. Bogged down by board minutes.

An association wanted to streamline their operations to allow them to have more time, and greater insights, to invest into membership growth. They couldn't expand their staff fivefold to meet the demand required for success

The first item we found was that the board process was taking up a disproportionate amount of headspace and effort for the leadership team, in particular the board minutes process, up to two weeks after each meeting.

An AI solution allowed us to get an accurate first draft of board minutes within five minutes, then verified by the CEO and other parties within an hour, with no reduction in quality.

The second challenge was how to support entirely new knowledge areas for the team. This led to a 'virtual expert' – a chatbot that holds expertise, process and policy, easily accessible to the team supporting members.

This not only allows growth, but also mitigates risk with their team whose knowledge is trapped in their head (and at some point want to take some leave, or even think of retiring!).

2. Could refreshing five years' CPD content take less than a week?

An association was trying to figure out how to refresh outdated CPD content. They estimated it would take nine weeks to refresh each CPD course, and almost a year to complete the task.

An AI workflow allowed us to extract all the content, create an outline, update it, and then automatically create a modern, rich, visual course – reducing a nine week process to three days and setting a standard format across all courses.

A very relieved CPD team can now focus on creating rich new courses instead of just refreshing the older ones.

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Dawid Naude

3. **Industry accreditation from 3000 hours a year to less than 300?**

   An association responsible for accrediting CPD content in the finance industry was manually assessing language, learning outcomes, and calculating CPD hours.

   They wanted to double the courses they accredit (also a revenue driver for them), but didn't have the staff resources

   By mapping the current assessment criteria, they were able to automate the accreditation process, going from almost 3000 hours per year to a few 100. A rigorous testing process went for months and found no drop in the quality of assessment, but instead showed enforcement of a consistent standard.

4. **"Recommended for you"**

   Every association puts their heart and sweat into events, courses, services, partnerships, advocacy and content - but it's often impossible for members to find what they are looking for on a website crowded with offerings. (Go to your member portal and try a few searches and see for yourself).

   One association overcame this by creating a "Recommended for you" experience like Amazon or Netflix, that looks at what content they click, newsletters they read, events they attend (even sessions they go to), and suggests great content they're missing out on. This has enabled their members to have more highly personalised engagement with the association offering - generating higher satisfaction.

5. **Skilled Migrant Assessment from 13 weeks to a few days**

   An association undertaking Skilled Migrant Assessments saw that whilst it was taking 13 weeks, the assessment itself was only a few days. The rest of the time was taken up by the applicant providing the wrong documents, or back and forth about the process, and formatting activities.

   They implements a process where AI does the first scan of all the documents, assess suitability, communicates with the applicant, and standardises the format.

   All the assessor now has to do is pick-up the application, after it's already been formatted, validated, back-and-forth with the applicant handled, and they can focus on what's most important - a high-quality assessment.

6. **How do you contact 1,000 prospects in one week?**

   Is it possible to contact 1,000 prospects in one week, in a way that isn't spam, or "spray and pray"? Could you create a huge list of target member companies, find the decision makers, craft a personalised outbound email highlighting the specific benefits they could get, and then do an automated follow-up if they haven't responded?

   An association with huge growth plans and a great new service implemented personalised outreach that is automatic, personalised and followed-up with. They simply arrive at work and see their calendar filled with bookings of high quality prospective members wanting a chat.

How you can start your AI pioneer journey

There's a very predictable process, first you need to be inspired about the possibilities, and then educated on how to make it happen. Then you need to identify the problems you are seeking to solve before picking any technology solutions – for instance, what is holding your association back? What is the thing that would completely change it in the future?

At this point you can explore the role AI can play, and start mapping a "now, next, later" roadmap outlining the next 12 months of initiatives, with a clear business case to take to the board.

It's a great journey, but mindset and inspiration are critical to taking the leap.

Best of luck.

Technology as Our Bridge—Not Our Barrier: Leading Associations into the Digital Era

Summary: Associations must embrace technology as a bridge to new opportunities, focusing on human-centric approaches to enhance member engagement, streamline operations, and drive innovation. By overcoming resistance to change and leading with empathy, associations can transition to Association 4.0, ensuring future growth and relevance.

In today's rapidly evolving digital landscape, associations face a critical choice: to view technology as an insurmountable barrier or as a powerful bridge to new opportunities. The rise of Industry 4.0—characterized by advanced technologies like AI, IoT, and automation—presents both challenges and opportunities for associations. As we stand at the crossroads of tradition and innovation, the journey to becoming Association 4.0 requires strategic leadership and a forward-thinking mindset.

Embracing a Human-Centric Approach

Throughout my career, from my early days at the American Association of Neurological Surgeons to founding .orgSource, I have led technology initiatives through each significant transition, witnessing firsthand the transformative power of technology within organizations. However, the most successful transformations have always been those that place the human element at the forefront. As associations navigate the complexities of Industry 4.0, it's essential to view technology not as a disruptive force, but as a powerful enabler of progress—one that amplifies your organization's mission and elevates the experience for both members and staff.

A human-centric approach involves prioritizing solutions that are intuitive, accessible, and precisely aligned with the unique needs of your members. This ensures that technology acts as a bridge, connecting your association more closely with its members and fostering deeper, more meaningful interactions.

Yet, I've also seen that technology initiatives often fall short when staff are not sufficiently involved in the decision-making process. Excluding them can lead to misalignment, resistance, and ultimately, project failure. To truly harness technology as an enabler, it's crucial to truly listen to and understand the needs of both your members and staff. Their insights and experiences are invaluable in shaping the direction of technological advancements. This collaborative approach is key to achieving not only successful but also sustainable outcomes.

Enhancing Member Engagement

Associations have a unique opportunity to leverage AI, data analytics, and personalized communication tools to not only enhance engagement but also craft more compelling stories. These technologies empower associations to deliver instant, highly relevant responses and customize their offerings to address the specific needs of their diverse communities. However, it's essential to remember that behind every data point is a person with distinct emotions, motivations, and expectations. Truly meaningful interactions arise when associations go beyond the data, tapping into the underlying emotional drivers that influence member behavior.

For instance, consider an association that uses AI-driven analytics to track member engagement across various platforms. The data might reveal that a particular segment of members frequently engages with content related to professional development. While this insight is valuable, the real impact comes from understanding the "why" behind the behavior. Perhaps these members are early-career professionals feeling uncertain about their future paths and are seeking resources to build confidence and skills. By recognizing this emotional driver, the association can create targeted programs and personalized communication that not only addresses their professional needs but also resonates on a personal level, fostering a deeper connection and loyalty.

This approach—where technology meets empathy—ensures that associations not only meet their members' needs but also build lasting relationships based on trust and understanding.

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Streamlining Operations

Efficiency is key to any successful organization, and technology offers a powerful means to streamline operations. At .orgSource, we've helped numerous associations evaluate their processes in order to automate routine tasks, improve data management, and implement cloud-based solutions. These efforts not only reduce costs but also free up resources for mission-critical activities.

Streamlining operations through technology allows associations to focus on their core mission while improving the overall experience for members. Automation lifts our sights toward problem-solving, forecasting, and creativity, enabling us to spend more time on initiatives that drive real value.

Driving Innovation and Growth

Innovation is the cornerstone of Association 4.0, and technology is its catalyst. In this era of rapid change, associations that embrace new technologies will be better positioned to lead their industries and serve their members effectively. By adopting cutting-edge tools and platforms, associations can drive growth, expand their reach, and deliver value in ways that were previously unimaginable.

Understanding the potential of emerging technologies like AI, virtual reality, blockchain, and the Internet of Things (IoT) can empower teams to reimagine how they deliver value. However, innovation should not be about technology for technology's sake. It must be directed toward community building and enhancing the human connections that are at the heart of every association.

Overcoming the Fear of Change

I have heard many times over the years and certainly now, that one of the biggest challenges association leaders face in this digital era is overcoming resistance to change. The rapid pace of technological advancement can be intimidating, leading to fear and hesitation among staff and members alike. Yet, to successfully transition to Association 4.0, leaders must address these concerns head-on and create a culture that embraces change.

Throughout my career, I've learned that change is often met with resistance, not because people are opposed to progress, but because they fear the unknown. This fear is often rooted in a preference for the status quo—a natural human tendency to cling to the familiar. As leaders, it's our job to guide our organizations through this uncertainty with empathy, clear communication, and a vision for the future.

By framing technology as a bridge to a better, more connected future, association executives can inspire confidence and enthusiasm within their organizations. It's important to highlight the benefits of new technologies—such as improved efficiency, enhanced member engagement, and new revenue streams—while also addressing potential concerns with transparency and support.

Leading the Charge Toward Association 4.0

As association leaders, we have the opportunity to shape the future. By harnessing the power of technology, we can create a new era of association leadership—one that is innovative, responsive, and deeply connected to the needs of our members. Let's lead with vision and courage, guiding our associations toward a future where technology is our greatest ally in achieving our goals.

Purpose-Driven Technology: Making Smart Choices for Your Association's Future

Summary: Associations must focus on member experience and team readiness when selecting technology. By aligning tools with strategic goals, maintaining systems, and prioritising people over platforms, associations can enhance member engagement, streamline operations, and remain adaptable in a rapidly evolving digital landscape.

Association management is a complex business. Multiple events, programs, and initiatives, along with the continuous effort to build and maintain member relationships and grow the community, are a lot to handle for usually small association teams. Unlike transactional businesses, associations thrive on ongoing engagement, requiring a constant connection with their members. This is further complicated by the fact that associations often operate with smaller budgets and leaner teams compared to their corporate counterparts.

Managing an association and delivering member services increasingly rely on smart technology use. In recent years, a number of digital tools have emerged specifically designed to enrich customer interactions and streamline the way we connect with our members. As we look to the future, it's clear that the success of associations will be deeply influenced by how effectively they adopt and integrate these technologies.

Cutting Through the Tech Jungle

Thankfully, we live in an age where technology can significantly ease the burden of association management. The number of technological tools available today is staggering. In 2024, the marketing technology landscape alone saw a 27.8% growth, with 14,106 marketing technology (MarTech) products on the market*.

However, the abundance of options can make choosing the right technology overwhelming. It's tempting to stick with the systems you've been using for years, especially when internal resistance to change is high. But the reality is that your members' expectations are continually evolving. In their daily lives, they experience seamless interactions with consumer brands that offer top-notch user experiences. If your platforms are slow, clunky, or difficult to use, you risk losing their attention and engagement and being seen as an old-school 'stale' organisation.

The Mission-Critical Objective: Member Experience

Improving member experience (MX) is not just a business objective; it's mission-critical. In both the 2022 and 2024 Association Industry Digital Trends surveys, enhancing member experience was highlighted as a top priority for association executives.

Starting your technology selection process by reviewing your member and team experience ensures that the tools you choose are aligned with what truly matters: delivering value at every touchpoint. By focusing on MX first, you're setting the foundation for a technology infrastructure that enhances member satisfaction, drives engagement, and ultimately supports your association's long-term goals. This approach ensures that your strategy dictates the technology decisions, allowing you to select tools that genuinely support your goals rather than adapting your organisation to fit the limitations of a pre-selected solution.

Where to Begin?

Start with Member and Team Experience Review: Begin by asking yourself what member and team experience you're aiming to deliver and consider how technology can help.

Use Member Journey Mapping Tool: Map out your members' entire journey, from initial awareness to their involvement as volunteers. Identify key stages and touchpoints where members interact with your association. Understanding these interactions helps you see where technology can enhance the experience by delivering relevant, timely and personalised content and improving your team's efficiency by automating certain tasks.

Bio Olena Lima, CAE is the driving force behind the marketing agency MemberBoat and the online educational platform Membership Marketing School, both dedicated to help professional associations and other membership organisations embrace emerging digital marketing tools. Drawing on her deep expertise and passion for technology, Olena provides strategic guidance in technology selection and implementation, helping organisations drive digital transformation.

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People Over Platforms: A Holistic Approach to Technology

Whether you're looking to implement a new Association Management System (AMS) or find ways to make the most out of your current technology, it's essential to focus on more than just the software itself.

More often than not, the technology itself isn't the issue. Sometimes, an organisation may outgrow its current system or, in contrast, isn't ready for advanced tech. In other cases, the technology might not align with the organisation's culture or team capabilities.

Think of it like giving a 15-year-old a Porsche to drive. If the car gets damaged, it's not necessarily the driver's fault—the vehicle might simply be too advanced for their current skill level.

Technology is not just about the software; it's about culture, change management, and the readiness of your team. It's about how well it's set up to meet the needs of your organisation and how well your team understands its capabilities.

Before choosing a solution, consider the lifecycle and culture of your organisation, the readiness of your team, and how well the technology aligns with your strategic goals.

Technology Maintenance: It's a Journey, Not a Destination

Imagine buying a car and expecting it to run flawlessly without any maintenance. It's not going to work like that. You need to learn how to drive, get a license, and perform regular maintenance like filling up the tank, checking the tyres, and visiting a mechanic for routine inspections. The same principle applies to your technology stack.

Firstly, it's important to understand the difference between an AMS (Association Management System) and a CRM (Customer Relationship Management) system. An AMS is tailored to support associations by managing memberships, events, and member engagement, while a CRM is focused on tracking and nurturing individual relationships, often used in sales and marketing.

There's a common misconception that once an AMS, CRM, or MarTech stack is launched, it will manage itself. Moreover, there's often an expectation that internal teams will suddenly become experts in managing these systems without any external support or training. This is unrealistic and can lead to significant issues down the line.

Just as you wouldn't hesitate to hire an accountant or outsource your annual tax return preparation to a financial professional, you shouldn't shy away from seeking external expertise to manage your technology. Regular tuning and updates are necessary to keep your systems running smoothly. It's not an extra cost—it's a critical part of maintaining your investment and ensuring you get the most out of it.

A Balanced Approach

Technology is a powerful tool, but it's not a magic bullet. It requires careful planning, regular maintenance, and a focus on people and strategy over platforms. By taking a holistic approach to your technology strategy, you can ensure that your association remains agile, responsive, and ready to meet the needs of your members—both now and in the future.

By asking the right questions, focusing on member and team experiences, and recognising the importance of regular maintenance, ongoing team training, and further investments, your association can not only keep pace with change but also lead the way in delivering exceptional experience and value to your members.

Maximising Impact: Innovative Attendee Engagement Techniques for Association Events

Summary: In the evolving landscape of association events, attendee engagement is crucial for creating lasting impact. Before, during, and after events, leveraging technologies like AI, personalization, and immersive experiences enhances connections, fosters innovation, and sustains meaningful relationships, ensuring event success and attendee satisfaction.

In the ever-evolving landscape of association events, engaging attendees has become more crucial than ever. As event professionals strive to create memorable experiences, the importance of attendee engagement cannot be overstated. It's not just about filling seats or hitting registration numbers; it's about ensuring that every participant leaves with a sense of value, connection, and inspiration. This article explores innovative strategies and cutting-edge techniques to maximize attendee engagement before, during, and after association events, offering practical insights for event planners and association professionals.

Before the Event: Building Anticipation and Personalised Connections

Engagement begins long before the event doors open. The foundation for a successful event is laid in the pre-event phase, where anticipation is built, and personalized connections are established.

1. Leveraging Event Apps for Pre-Event Engagement

Event apps have become a cornerstone of modern event planning, offering immense potential for pre-event engagement. These apps can be used to share event agendas, speaker bios, and session descriptions well in advance, allowing attendees to plan their experience. More importantly, they can facilitate networking opportunities before the event even begins. Matchmaking algorithms can suggest connections based on shared interests or professional backgrounds, helping attendees start conversations and form relationships early. Exclusive online content uploaded to the app can encourage attendees to engage long before they walk through the event doors.

2. Personalised Communication and Content

Personalisation is no longer a luxury; it's a necessity. Attendees expect communications relevant to their interests and needs. AI-driven tools like SPARK AI can analyze attendee data to deliver personalised email campaigns, tailored content recommendations, and customised event experiences. For example, if an attendee has expressed interest in a specific topic or session, they can receive targeted content and updates, ensuring they feel valued and engaged from the outset. Nothing frustrates attendees more than receiving communications about things they've already signed up for or aren't interested in. Personalisation is paramount to creating a positive experience.

3. Creating Immersive Pre-Event Experiences

Immersive experiences aren't limited to the event itself. Virtual reality (VR) and augmented reality (AR) can be used to create immersive previews of the event, allowing attendees to explore the venue, experience a teaser of the sessions, or even participate in virtual networking events. These technologies build excitement and provide a sense of familiarity, making attendees feel more comfortable and connected when they arrive.

During the Event: Enhancing Engagement Through Technology and Immersive Education

Once the event is underway, maintaining and enhancing engagement is key. This is where innovative technologies and immersive educational experiences come into play.

1. Real-Time Feedback Tools

Real-time feedback tools are revolutionising how events are managed. Platforms like Snap Sight enable attendees to provide instant feedback on sessions, speakers, and the overall event experience. This feedback can be displayed in real-time, allowing organisers to make on-the-fly adjustments to improve the attendee experience. These tools empower attendees by giving them a voice in shaping the event as it unfolds, fostering a sense of ownership and engagement.

2. Immersive Education for Conference Sessions

The traditional lecture-style conference session is giving way to more immersive educational experiences. Techniques such as gamification, interactive workshops, and simulation-based learning are being integrated into event programs to enhance attendee participation and knowledge retention. For instance, using AR in sessions allows attendees to interact with 3D models or simulations related to the content being presented. This hands-on approach not only makes the learning process more engaging but also ensures that the information is more likely to be retained and applied.

3. From Networking to Meaningful Connections

In the age of digital networking and AI-driven interactions, there's a growing recognition of the value of 'old-fashioned' activities that foster genuine, face-to-face connections in a more relaxed and informal setting. Rather than relying solely on technology to bring people together, event planners are turning to activities that encourage attendees to unwind and interact naturally. Arcade games, large-scale games like giant chess, Jenga, and Connect Four, and interactive stations such as lolly walls, juice bars, and all-day grazing pantries are becoming popular features at association events. These activities create a playful and engaging environment where attendees can bond over shared experiences, leading to more meaningful connections. By stepping away from the traditional networking formula and introducing these nostalgic, hands-on elements, event organizers can facilitate deeper interactions and build a sense of community that extends beyond the event itself.

4. Creating Inclusive and Personalised Experiences

Inclusivity is a critical aspect of modern event planning. Technology can play a significant role in creating personalised and inclusive experiences for all attendees. AI-driven translation tools can break down language barriers, ensuring that non-native speakers can fully participate in sessions and discussions. Additionally, event apps can offer customisable accessibility features, such as screen readers or adjustable font sizes, catering to attendees with disabilities. By prioritising inclusivity, event planners can ensure that every attendee feels valued and engaged.

For those who identify as neurodiverse, it's essential to create environments and experiences that accommodate their unique needs. This can include offering quiet zones where attendees can retreat from sensory overload, providing clear and concise communication in both written and verbal formats, and allowing flexible participation options in sessions, such as the ability to engage with content at their own pace. Event organizers can also incorporate sensory-friendly elements and design activities to be inclusive of all neurological differences. By considering the diverse needs of neurodiverse attendees, event planners can create a more welcoming and supportive environment that encourages full participation and engagement.

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After the Event: Sustaining Engagement and Measuring Impact

The event may be over, but the engagement doesn't end when the lights go out. The post-event phase is crucial for sustaining connections, gathering feedback, and measuring the impact of the event.

1. Post-Event Surveys and Continuous Feedback

Collecting feedback after the event is essential for understanding what worked, what didn't, and how future events can be improved. Event apps and feedback tools like Snap Sight can be used to send out post-event surveys, gathering insights on everything from session content to logistical arrangements. This data is invaluable for continuous improvement and for making data-driven decisions in future event planning.

2. Measuring Engagement and Impact

Engagement is a critical metric for assessing the success of an event. Tools like SPARK AI can analyse attendee behaviour during the event, from session attendance to interaction levels in networking events. This data can be used to measure engagement and determine the event's overall impact. Moreover, AI-driven analytics can help identify trends and patterns in attendee behaviour, providing deeper insights into what drives engagement and how it can be optimized in the future.

3. Sustaining Connections and Building a Community

The relationships formed at an event shouldn't end when the event does. Event apps and social media platforms can be used to sustain connections and build a sense of community among attendees. Creating a post-event discussion forum or social media group allows attendees to continue conversations, share insights, and stay connected. This sense of community not only extends the event's impact but also fosters long-term engagement and loyalty.

Conference content doesn't have to be confined to the days of the event; it can be repurposed and expanded upon to provide ongoing value to attendees. By transforming key sessions, workshops, and presentations into online webinars, podcasts, or articles, event organizers can continue to engage attendees long after the event has concluded. Additionally, these ongoing educational sessions can be delivered in a roadshow format, bringing the education directly to the learner in their local community. This approach not only reinforces the key messages from the conference but also provides continued opportunities for attendees to come together, network, and learn. By extending the life of conference content, association professionals can maintain momentum, foster deeper learning, and strengthen the sense of community among their members.

Conclusion: Ensuring Lasting Impact Through Innovation

In the competitive world of association events, maximizing attendee engagement is key to ensuring lasting impact. By leveraging innovative technologies, creating immersive and personalized experiences, and continuously measuring and improving engagement strategies, event planners can create events that not only meet but exceed attendee expectations. The result is not just a successful event, but a lasting impression that keeps attendees coming back year after year.

In a world where attention is the most valuable currency, association professionals must stay ahead of the curve, embracing new tools and techniques to capture and maintain attendee engagement. By doing so, they can transform their events from mere gatherings into impactful, memorable experiences that resonate long after the final session ends.

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See culture

Aboriginal weaving workshop, Darwin.

The Northern Territory offers a multi-sensory experience that transcends the physical and connects you to the land, the ancient culture and the people. We are a destination that empowers delegates to reconnect to what matters.

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Different in every sense for business events

NORTHERN TERRITORY BUSINESS EVENTS

10TH SNAICC National Conference

Case Study

Name	SNAICC '23 – the 10th SNAICC National Conference
Destination	Darwin, Northern Territory, Australia
Venue	Darwin Convention Centre
Pax	1624 delegates
Website	www.ntbusinessevents.com.au

About SNAICC

SNAICC – National Voice for our Children is the national peak body in Australia for Aboriginal and Torres Strait Islander children and families and the sectors that support them. SNAICC's dynamic membership base comprises Aboriginal and Torres Strait Islander community-based early education and child care agencies plus a network and subscriber base of over 15,000 individuals from mainstream and Aboriginal organisations, as well as State and Federal Government agencies.

About the Conference

The 10th SNAICC National Conference hosted by SNAICC - National Voice for our Children was held in Darwin in September 2023 and showcased how genuine cultural exchange can be included in a business event program in the Northern Territory (NT).

Attendees included representatives from early childhood education, care and development sectors, social services, Aboriginal community-controlled organisations, government and peak bodies. The three-day Darwin conference provided an opportunity for delegates to learn, share and network.

Why Darwin and the Northern Territory?

Attracting this biennial conference to Darwin was a joint partnership between the Darwin Convention Centre and NT Business Events, with support provided for planning and staging. The conference theme "Voices at the Top – our children, our rights, our way" reflected the event being held in the region known as the Top End of the Northern Territory.

Darwin's vibrant Aboriginal and Torres Strait Islander population offered strong cultural connections for the SNAICC'23 conference.

Largest ever SNAICC conference:

With over 110 concurrent sessions, this was the biggest SNAICC National Conference ever held.

The conference opened with a Welcome to Country on behalf of the Larrakia People of Darwin, Traditional Owners of the land. The conference cultural program featured performances each day and included local organisations such as The Youth Mill, Maningrida Dance Group, and the Garramilla gulwa dancers. SNAICC'23 also featured a 'Market Hall' exhibition at the Darwin Convention Centre which showcased more than 30 Aboriginal artists, retailers and services.

In Their Words

“The SNAICC’23 conference was our largest and most successful to date. We were very excited to have our conference in the Top End, allowing us to connect with our colleagues and the sector up north and to the Traditional Owners and culture of the saltwater people.”

“Feedback received from delegates was overwhelmingly positive and supportive. They loved the location, being able to explore the surrounding Darwin area and Top End, visiting waterfalls and waterholes. They enjoyed the balmy weather, access to attractions and restaurants, and the opportunity to engage with and learn about local Aboriginal culture. The location was ideal and the service and support was wonderful.”

Fran Whitty, Director of Operations, SNAICC – National Voice for our Children

The Social Program

Three social events were held and included a function at the award-winning Wharf One Food and Wine in the nearby Darwin Waterfront Precinct.

The Welcome Reception staged at the Darwin Convention Centre’s outdoor Harbour Boardwalk area featured casual street-food cuisine and enabled roving-style dining and delegate networking. The Conference Gala Dinner staged at the Centre included dishes from their renowned ‘Seven Seasons’ dining experience which showcases the flavours, unique produce and seasonal cuisine of the Larrakia People.

Darwin Convention Centre Provides The Perfect Location

SNAICC’23 conference organisers noted that some of the stand-out aspects of the Darwin Convention Centre were its waterfront location and views, plus convenient access to the nearby bars, restaurants and attractions at the Darwin Waterfront Precinct. With a key focus of the conference being networking and bringing people in the sector together, organisers said that the venue’s location had greatly assisted to achieve this objective.

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

A traditional Welcome to Country and cultural performance at the SNAICC’23 conference.

Sorry. How do we do this again? Creating contexts for collaboration

Summary: Creating contexts for collaboration in the workplace and at events is essential in the post-remote work era. Event managers can enhance engagement through skill-building stations, interactive sessions, quiet zones, and mentorship breaks to help attendees reconnect and foster communication.

The Shift Back to the Office: A Controversial Move

In early August 2024, the NSW Government declared that they wanted to end the pandemic-era, totally flexible working environment enjoyed (or at least tolerated) since the beginning of the pandemic in 2020. The change would mean that without due cause to be away from their notional place of work, all 430,000 NSW public servants would have to return to the office.

The media went nuts.

Variously describing the directive as "out of touch" and a capitulation of senior management to commercial real estate players, who had been preaching and hand-wringing about empty desks, commentators concluded that any organisation issuing mandates to work from the office was practising rank presenteeism.

(It is fascinating to see just how far opinion about working from home has changed from the beginning of the pandemic. Back in 2020 there was general public outcry about being forced to work from home. Less than five years later, there's an outcry over being forced to work in the office.)

Communication Breakdown in Remote Work Environments

But getting back to the office isn't just the approach of the NSW Government. Corporates and non-profits are all considering their investments in property assets, as well as the impact of working from home over four years. And while working from home did not dramatically affect productivity in the manner many predicted at the height of the pandemic, there is growing evidence that prolonged and exclusively remote work is having a negative impact on effective communication and collaboration, and these are negatively impacting productivity.

In no scenario is this phenomenon more apparent than in semi-annual face-to-face events, such as workshops and conferences. When virtual teams are brought together - sometimes for the first time with their own workmates, let alone people from other organisations - the awkwardness can be palpable.

Researchers have observed that communication differences among virtual teams have created new challenges for managers, including declining motivation, slowed decision making and delayed understanding of complex issues (see Vuchkovski et al 2023). For instance, asynchronous communication methods such as messaging and chat systems, have made it easier for workers to avoid the sometimes confronting act of negotiation that occurs in face-to-face contexts. From a collaboration perspective, this means that workers may not be developing adequate skills in effective listening, coherent sharing of ideas, and expression of empathy - all absolutely vital for effective collaboration.

Creating Contexts for Collaboration at Events

For Associations, and particularly for people designing face-to-face conferences and workshops, these differences in workplace communication practice mean that conventional conference programs and workshops may not engage participants quite as may previously have been expected. And they may not elicit the kind of outcomes that such events would generally be designed to produce.

As such, Association event managers need to work harder to accommodate the communication habits of now traditionally remote workers. Key to successful reintegration is a balance between quiet time and engagement. Event managers may consider the following options:

1. **Skill-building segments or stations**
   Rather than trusting in standard networking, set up formal, small places where delegates can drop in, to learn a new skill, or experiment with software or get hands-on with creating things related to the discipline area. This takes the pressure off from introductions to people, and creates a context for conversations.

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2. Fishbowl sessions

Rather than standard panel sessions with low audience interaction, fishbowl sessions allow a session chair to be anchored and the subject matter to be set, but the panelists may shift and change in the session, with an audience member who wants to join the panel touching the shoulder of an existing panelist. Only panelists are allowed to speak, but a range of views can be canvassed by a rotating panel. It's wise to have the initial panel sorted at the start of the session, but a regular change in panelists helps vary the viewpoints.

3. Well-marked quiet zones

These are places with gentle lighting and protected from the noise of the event, usually with charging stations and light refreshments. Where workers are returning to face-to-face events, these quiet zones can help people feel comfortable with being among others.

4. Problem solving sessions

Either determining problems worth solving or, ideating around these problems can be a good way to encourage communication and collaboration. This can be done as a guided whole session, but works better in small groups for an hour or more.

5. Unconference sessions

These are parallel 20-30 min slots in a conference where delegates can elect to run their own sessions or presentations, and post these to a board. Delegates can choose to attend whatever session they like. This program flexibility supports the self-directed workplace habits that remote workers have developed.

6. Mentorship lunches and breaks

Pairing up experienced and newcomer workers to discuss topics from the workshop or conference, or discussing potential issues in the workplace can be a useful way to structure networking during down times, so that delegates are not overwhelmed with networking expectations.

7. Digital engagement

Applications or sites where live polls, Q&A and messaging can take place, and where delegates can look up other delegates and reach out to them in a manner to which they have become accustomed, can help bridge the gap between new and conventional workplace and broader industry communication.

Of course there's also speed networking, team-building games and treasure hunts, as well as traditional roundtables and networking, and all of these can add a little fun to events. But event managers should plan to engage in a way that makes it easier for remote workers to make the most out of human connection, without overwhelming them with the whole act of "peopling".

In CSIRO's research of more than 12 million online job advertisements, they found that interpersonal skills are now a "currency of career success". While this trend began long before the pandemic, the number of people with effective interpersonal skills in business appears to be in decline. Further, the contexts where capability can be developed for effective collaboration are limited.

The Importance of Context in Collaborative Events

Because workers have now adopted tools of communication that were used during the pandemic in remote contexts, the spontaneous, informal and conciliatory forms of communication that previously characterised workplaces are not so easy to retrofit to the modern workplace, let alone to events. And ordering people back to work, or to a face-to-face conference is not likely to change that. Indeed, ironically, it may further isolate workers from one another, as they retreat into their cubicles, headphones permanently clasped to their heads, and an array of screens spanning their field of vision. And that's in a workplace. At an event, it might drive delegates to check out early - if they turn up at all. Because for such workers, without a context for collaboration, physically being present can be more biological than conscious.

It is the privilege and the responsibility of managers and event designers to create contexts where the skills of collaboration, negotiation and idea sharing can be practised and improved. There are ways to make the transition back to face-to-face much easier. We just need context as a reminder of how to do that "peopling thing" again.

Transforming Association Events: Strategies for Revenue Diversification and Member Engagement

Summary: To ensure association events thrive, integrate them into strategic goals, focusing on member engagement and revenue diversification. Prioritize high-quality content, build sponsor partnerships, manage risks, and create memorable experiences through innovative event formats, enhancing long-term success.

In a world where associations are increasingly losing ground to commercially-led competitors, how can you ensure your events not only survive but thrive? The key lies in transforming your event strategy into a dynamic, revenue-generating engine that also deepens member engagement. With associations uniquely positioned to leverage their existing strengths - such as a dedicated audience, expert content, and valuable industry contacts - there is a golden opportunity to innovate and grow in this rapidly changing landscape.

Make Events a Core Component

To ensure your events are not just an add-on but a core component of your strategic plan, they must be integrated into the association's broader mission and vision. Events should be viewed as strategic assets that contribute to the overall goals of advancing member interests, enhancing brand visibility and driving revenue diversification. This requires prioritisation, dedication, and a clear recognition of the strategic objectives behind every event you plan.

Revenue Diversification Beyond Delegate Sales

Revenue diversification is critical for reducing reliance on membership fees and events are best placed to do this as they also enhance member engagement. There are, of course, the usual suspects when it comes to creating revenue through events such as sponsorship but it's the approach that has changed.

After the surge in digital events in recent years, sponsors have come to expect quantitative results on ROI. Statistics are very easy to produce digitally but less transferable in live events and this is where a significant change has happened in sponsorship. Your sponsors need to become partners with two-way conversations which identify both parties' objectives.

The appeal of set sponsorship packages such as gold, silver and bronze has diminished and sponsors now require a targeted approach to their objectives and this is where associations can flourish. With their audience and sector knowledge, this approach allows associations to create innovative events to meet the needs of the sponsors whilst keeping the members' interests at the heart of each event creation. If the sponsor can meet their objectives through the right event for them, the conversation moves from a price point to a value point.

Creating value for sponsors builds long-term partnerships and increases revenue streams.

Content Is The Cornerstone For Successful Events

The goal of any association is to advance its members' interests across education and market knowledge and this is most effectively achieved through high-quality event content. Content is what makes you stand out in a crowded events market and adds the most value to your offerings. However, even the most compelling content can fall flat if delivered in the wrong format. It's essential to create your event around its content, continually asking, "What is the best way to deliver this content to this particular audience with impact?"

Incorporating innovative delivery methods, such as hybrid event models or personalised event experiences, can ensure that your message resonates with both in-person and remote attendees. For instance, live polling, interactive Q&A sessions, and breakout rooms can enhance engagement and ensure participants leave with actionable insights.

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Bio Katherina is an experienced event strategist with over 20 years of experience driving revenue, growth, and member engagement through associations' event portfolios. She excels in developing overarching event strategies, assessing and selecting event opportunities, and providing strategic support throughout the event lifecycle to ensure impactful outcomes.

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Navigating Uncertainty With Risk Management

While being bold and innovative is crucial to ensure your events business thrives, so is managing risk. Diversification of event types, flexible supplier and venue contracts, and contingency planning are essential strategies for mitigating risks. UsingUtilising data analytics to forecast potential risks and adjust your strategy accordingly can prevent setbacks and ensure your events remain successful. For example, setting up KPIs like NPS scores, delegate retention, or conversion rates can provide early indicators of success or areas needing improvement.

Actionable Steps For Event Growth

Before you can grow your events into a thriving business, it's essential to assess and improve your current offerings. This involves a thorough analysis across several areas:

- **Skills analysis:** Identify who is responsible for what within your team and ensure that event planning is a primary objective rather than a secondary task.
- **Process optimisation:** Streamline your processes using platforms, AI, and improved communication tools to increase efficiency.
- **Budget review:** Ensure your event budget aligns with your objectives and is being allocated effectively.
- **Content evaluation:** Regularly review the relevance and delivery of your content to maintain its impact.
- **Measurement:** Use both quantitative and qualitative metrics to track year-on-year growth and refine your approach.
- **Revenue and delegate numbers:** Recognise numbers only tell part of the story and are dependent on the organisation.

Once these areas have been addressed, focus on growth by investing time and resources, reassessing your current offerings, conducting thorough research, and being bold in your approach. Remember, not everything will work, and failure is part of the process so clearly define what success looks like for your association. By setting clear timelines with milestones and aligning these with your venue and supplier contracts, you can mitigate risks and pivot as necessary without significant penalties.

Make Events Memorable

For your event business to thrive, it must be a strategic objective supported by the entire association. Events offer a unique opportunity to upsell other products such as journals, courses, or job boards, using them as a springboard to promote all other offerings. The ultimate aim of any event is to make it one that people remember, not just for the content they received, but for the overall experience. When attendees bookmark the time they spent, the people they met, and the learnings they gained, they are more likely to return the following year and become ambassadors for your association.

The Soft Power of Wellness at Meetings and Events: A Win-Win for Members and Associations

Summary: Incorporating wellness activities into conferences provides both attendees and associations with significant benefits. These activities improve physical and mental wellbeing, create organic networking opportunities, and enhance attendee satisfaction. For hosts, they boost attendance, sponsor appeal, engagement, and overall return on investment.

Gone are the days when conferences meant endless hours of PowerPoint presentations and rubbery chicken dinners (although I'm sure they still exist in some corners of the industry). As meeting and event organisers we are constantly thinking about how we produce events that encourage our attendees to get the most of their time, and provide a holistic approach to their needs, be it mentally, physically, or emotionally.

Introducing wellness activities to the agenda should now be a must-have rather than a nice-to-have, recognising that a healthy delegate is a happy delegate.

And it's not just the attendees who benefit; the return on investment and reflection on the association can be significant too. As member rates dwindle and individuals are carefully considering where to spend their hard-earned money, we must recognise how to create additional value for both parties. We know one of the top 5 association member benefits are events, so why not leverage the ability to communicate and showcase directly with members that care and ramp up those positive associations.

Wellness Activities: What Are They?

Wellness activities are designed to help attendees recharge, both physically and mentally. These can range from the traditional, like yoga and meditation sessions, to the creative, like guided nature walks or even laughter therapy. The goal is to break up the day, promote relaxation, and ensure that attendees are in the best possible state to absorb information, network effectively, and stay engaged with both the event and the association long term. It's not just onsite that the benefits of these activities can be felt. Long after an event is over delegates can take away elements of these activities and apply them to their everyday life.

The Delegate Delight: Benefits of Wellness Activities (and proven examples)

1. Networking Opportunities

Traditional networking events can feel a bit forced, especially for introverts. Wellness activities offer a more relaxed and organic environment for delegates to connect. Whether it's chatting with a new contact during a group hike or sharing a laugh in a massage chair, these activities can foster deeper connections that go beyond the usual exchange of forced conversations at the welcome drinks.

Outdoor Walks or Fun Runs: Organising a morning walk or run provides delegates with a chance to get some fresh air, stretch their legs, and network in a casual setting.

2. Physical Health

Conferences often mean long periods of sitting, which isn't great for anyone's health. Incorporating activities like stretch breaks can combat the negative effects of prolonged sitting, keeping energy levels high and reducing the risk of conference fatigue.

Massages: A quick massage can work wonders for tired delegates, helping to relieve tension and rejuvenate both body and mind. Plus, placing this in the exhibition area promotes interaction with sponsors and exhibitors which means more visitors, happy sponsors, and therefore the potential for longstanding sponsor partnerships.

Ergonomic Centre: Interactive sessions with a physiotherapist that educate delegates on healthy habits and routines within the workplace and at home go a long way to providing real value. Having initiated this workshop at a recent event we can vouch for its merit!

Bio Denise Broeren, Co-Founder and Director of Business Development brings a wealth of experience and an innovative mindset to the world of professional conference management. Denise considers each conference an adventure, she never tires of the challenge of bringing an event alive with innovation, technology and new ideas.

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Denise Broeren

3. Mental Wellbeing

The stress of travel, networking, and absorbing vast amounts of information can take a toll on mental health. Wellness activities focused on mindfulness and relaxation help mitigate this stress, ensuring delegates remain in an optimistic state of mind throughout the event, and importantly post-event, when those longer-term positive associations are actualised.

Yoga and Pilates: A gentle session to start the day can set a positive tone, helping attendees feel energised and ready to engage.

Mindfulness and Meditation: Short, guided meditation sessions between educational sessions help clear the mind and reduce stress, ensuring that attendees can remain focused.

ROI for Hosts: Why It Pays to Invest in Wellness

1. Higher Attendance Rates

Wellness activities can be a significant draw, especially in a market where attendees have a plethora of options and not enough resources (both time and financial) to necessarily attend all the events they would like to. Offering unique and appealing wellness programs can boost registration numbers and attract a more diverse audience e.g. Millennial and Gen Z delegates who will produce a longer CLV (customer lifetime value).

2. Attractiveness to Potential Sponsors = More $$$

The conference circuit is competitive, with events vying for the attention of potential sponsors. And what sponsor wouldn't want to be the one associated with the positive feeling that wellness activities provide. Offering these activities that brands and organisations can sponsor directly means attaching their names that assist in creating stronger positive brand associations.

3. Enhanced Reputation

Conferences that prioritise delegate wellbeing stand out in a crowded market. By offering wellness activities, associations can signal that they care about their member's overall experience and welfare post-event, not just the content being delivered. This can lead to higher satisfaction rates, repeat attendance, and positive word-of-mouth.

4. Increased Productivity and Outcomes

When delegates are relaxed and focused, they are more likely to engage with the content, participate in discussions, and contribute meaningfully. This can lead to better outcomes for conference sessions, workshops, and networking events. Hosts benefit from a more dynamic and effective conference, leading to higher membership rates, better engagement and increased attendance for future events.

An Overall Healthier Experience

Incorporating wellness activities into your conference and member events isn't just a trendy add-on; it's a strategic move that benefits both delegates and event hosts. For delegates, these activities enhance focus, wellbeing, and networking opportunities. For hosts, they lead to higher satisfaction rates, better outcomes, and a stronger ROI.

So, the next time you're planning a conference, remember: a little wellness goes a long way. And who knows? You might just find your event becoming the one everyone can't stop talking about—for all the right reasons.

In a World of Instant Gratification, Are You Just Ticking The Box?

Summary: In a world focused on instant gratification, event legacies are often reduced to a "tick the box" exercise. The key distinction lies in understanding that outcomes are short-term, measurable achievements, while legacies develop over time, driving long-term impact and change.

This may be controversial, but the term legacy seems to be the buzz word of the 2020s – much like innovation was in the early 2000s! It is a phrase or a term that everyone is using, potentially without fully understanding what it means to put into practice!

What is the True Definition of an Event Legacy?

An event legacy refers to the long-term impacts and enduring effects an event has on an organisation, community, or a destination (BestCities Alliance, 2020). The International Congress and Convention Association (ICCA) also reinforces that a legacy is typically identified as what an organisation leaves behind, having been built over a long period of time.

It is worth noting that between these two critical definitions, the common message is that a legacy is measured over the long-term. So now that we live in a world of instant results for instant gratification, has the true concept of a legacy become a "tick the box" exercise? Or do we simply need to introduce a clear delineation between an event legacy, and the event outcomes?

Legacy vs Outcomes

Where a legacy needs time to develop to be truly measured and identified, outcomes are measurable, intentional and provide quick metrics for that instant gratification – allowing us to tick the box against our KPIs and what we set out to achieve. In addition, outcomes are the direct result of our efforts and activities, and subsequently become the drivers for any legacy (Best Cities Alliance, 2020).

There are some incredible examples out there to demonstrate exactly what this means for any association:

FIFA and Women's Soccer in Australia

One of the most significant examples is the impact of the 2023 FIFA Women's World Cup on women's soccer in Australia. The tournament was not only a landmark event in terms of global viewership—reaching an estimated 1.12 billion people—but also had a profound impact on local participation in women's soccer.

Outcomes: In the months following the tournament, Australia saw a 669% increase in Liberty A-League soccer club memberships, and over 400,000 new female participants signing up to play in local clubs across the country. This surge in participation is a direct result of the visibility and success of the Women's World Cup. Moreover, the tournament led to a 20% increase in the number of girls' teams formed in community soccer clubs, indicating a broader cultural shift toward supporting female sports.

Legacy: The Australian government and soccer associations now recognise the need to invest in infrastructure, coaching, and grassroots programs to support the continued and sustainable growth of women's sports. This includes a combined investment of $398 million from the Australian and various State Governments across a number of initiatives, including the redevelopment of facilities for female players and a strategic plan to double the number of women and girls playing soccer by 2027. The legacy of the World Cup, therefore, is not just a short-term spike in participation but a long-term strategy to embed women's soccer into the national sports culture.

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Bio Lana boasts a long and rich history in the events industry, with pride and passion for international association events. Her portfolio of clients includes some of the largest international events including the 16th World Congress on Intelligent Transport and the 2024 Lions Club International Convention.

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The 2017 International Astronautical Congress and the Birth of the Australian Space Agency

The 2017 International Astronautical Congress (IAC) in Adelaide brought together over 4,000 delegates from more than 70 countries and played a pivotal role in Australia's decision to establish its own space agency. Before the congress, Australia was one of the few developed countries without a dedicated space agency, despite its long history of contributions to space research and technology.

Outcomes: During the hype of the congress, the Australian government announced the formation of the Australian Space Agency, which formally commenced in July 2018. This decision was directly influenced by the discussions, networking, and global attention generated in the lead up to, and during the IAC. The establishment of the Australian Space Agency marked a significant milestone in the country's space ambitions.

Legacy: In the five years since the congress, the value of the sector has seen a 50% increase and is now measured at $5.3 billion. The Australian Space Agency has set ambitious goals to triple the size of the nation's space sector to $12 billion and create an additional 20,000 jobs by 2030. The agency has already made substantial progress, including securing a $150 million investment to support Australian businesses in NASA's Artemis program and fostering international partnerships with space agencies and companies around the world.

The 2014 International AIDS Congress: A Decade of Measurable Impact

The 2014 International AIDS Congress in Melbourne, attended by over 13,000 delegates from around the world, was a major milestone in the global fight against HIV/AIDS.

Outcomes: The congress was a platform to establish the Melbourne Declaration – a pledge from all health ministers from every Australian state and territory to the virtual elimination of HIV. A secondary, direct result of the event was announced in 2015 when the Victorian Government introduced new laws around the criminalisation of transmission of HIV which was highly regarded by people living with HIV and as an initiative to protect our communities.

Legacy: In the decade since the congress, one of the most significant impacts has been the acceleration of HIV research and the development of new treatment options. Australia saw a 35% increase in funding for HIV research in the five years following the congress, leading to significant advancements in treatment and prevention strategies. The event led to the implementation of more comprehensive prevention programs, which is believed to have contributed to a 20% reduction in new HIV diagnoses in Australia between 2014 and 2023.

Design the outcomes, preserve the legacy

The concept of event legacies has evolved significantly over the years, as organisations increasingly recognise the potential for events to have lasting impacts on a wider community. The challenge is to ensure that these legacies are not just viewed as a quick metric to tick the box and move on – but rather are the result of an ongoing series of efforts and activities that align with your overarching intentions. For associations, the key to developing an enduring legacy is to focus on measurable, tangible and practical outcomes that contribute to long-term change.

In the words of Mike Hawkins: *"You don't get results by focusing on results. You get results by focusing on the actions that produce results"*

One 2025 Resolution to Turbocharge your Member Experience: A Cohesive Data-Driven CPD Strategy

In a rapidly re-shaping future, the need for continuous professional development (CPD) is more important than ever.

Today, this often means melding more contemporary learning journeys with more traditional CPD programs, offering a more diverse set of options for both existing and non-members. While we recognise how these programs enhance the skills of members, we also understand that they foster "connection through community" and can nurture a culture of deeper engagement and growth within the association

This article explores how data-driven CPD initiatives can reshape the trajectories of Australian associations and offer insights for senior leaders and board members

Tell me more about data and CPD

At its core, data-driven CPD is a natural outcome of a good data integration strategy, effective analytics and dashboards plus accessible technology tools that simplify processes and champion member agency. Traditionally CPD relied on often generic content and one-size-fits-all experiences including both formal and informal learning activities. Data-driven programs can harness insights from the spectrum of member-journey data points, learning preferences, community curation and knowledge and skills development metrics. Using these inputs an evidence/data-centric strategy can ensure that CPD offerings are much more relevant, compelling and aligned to the aspirational goals and specific needs of your members.

Leaders can capitalise on data-led programs to refine and grow CPD programs. By tracking member progress and outcomes, they can see how their associations can continuously improve their offerings and can demonstrate how they are meeting their members' needs to a wide variety of stakeholders.

What are the benefits?

1. Personalised Learning Experiences

This first point should come as no surprise to anyone who has attended a webinar, leader Xchange or retreat this year. For leaders and boards demanding sustainable impact, the most significant advantage of data-driven CPD is the ability to offer personalized learning experiences. By analysing member data and understanding the insights available, associations can identify skills gaps and interests, allowing the association to be more agile in the curation of engaging content and experiences that resonate with individual learners. This personalised approach builds trust, increases the likelihood of retention and can revitalise the culture and community experience of associations.

The Property Council has been particularly successful in creating a more cohesive, relevant and agile experience to meet the diverse and complex demands of property industry professionals across the region. Based on a data driven strategy, the Property Council offers hundreds of online and face-to-face learning options, supported by over 400 industry SME's to its members on an annual basis.

2. Enhanced Member Engagement

Data-driven CPD programs can transform member engagement. By utilising platforms that simplify interactive content development and prioritise branched pathways, associations can create collaborative and dynamic learning environments that encourage participation. Features such as forums, quizzes, reflective and social learning tools and feedback mechanisms encourage members to connect, collaborate, and share their experiences.

When combined with data sets from other systems, deeper insights can help associations identify when members are most engaged and what types of content or activities drive the highest participation. With this information, associations can better target new product development, more effectively schedule activities and create valuable experiences that better align with member preferences.

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3. Measuring Outcomes

From a strategic perspective, the most compelling reason to adopt data-driven CPD programs is the ability to measure outcomes effectively. Traditional CPD often lacks clear metrics to assess the impact of learning on member performance and success. In contrast, data-driven approaches provide associations with just-in-time snapshots of cohort progress and real-time dashboards to easily evaluate the effectiveness of their CPD initiatives.

By tracking completion rates, skill development, knowledge acquisition and even changes in member performance and sentiment post-training, associations can gain insights into what works and what doesn't. This richer picture enables leaders to better inform boards about how 'the needles are moving" and allocate resources more effectively and efficiently.

4. Increased Accountability and Compliance

With ever-growing risk and accountability requirements, data-driven CPD programs help associations ensure compliance with current and emerging industry standards and regulatory requirements.

From a growth and sustainability perspective, the increasing focus on lifelong learning enables associations to position themselves as leaders in their sector or industry - showcasing the impact of innovative CPD offerings on the improved outcomes and circumstances of their members. The evidence of this impact is what builds brand value, perceived industry leadership and member loyalty.

5. Strategic Planning and Resource Allocation

While this point has been alluded to previously, it is worth reiterating - data-driven insights allow associations to make strategic decisions about their wider business and not just about their CPD programs. By understanding emerging trends and member progress, associations can prioritize initiatives and optimise resources more effectively.

This strategic approach not only enhances the quality of CPD offerings but encourages a more agile mindset ensuring that associations can remain relevant and responsive to the evolving personal and professional needs of their members.

Challenges and Considerations

While the benefits of data-driven CPD programs are clear, associations must also be aware of the challenges involved in implementing these initiatives. Ethical approaches and policies regarding data privacy and security compliance are paramount. Transparent communication with members about how their data is used is also critical in building both trust and positive sentiment.

Associations also need to invest in the right technology and tools. Core platforms must 'play nicely together" from a data perspective and vendors should be able to articulate how their capabilities will support their customers' data-driven strategies. Associations must also be willing to allocate resources and invest in their staff through training and enablement.

Conclusion

Whether the association is large or small, local or national, new or established, data-driven CPD programs are powerful tools that associations can marshal to support their immediate and longer-term viability and growth goals. For senior leaders and board members, many of the answers to the existential questions they confront can be found at the intersection of data, core offerings such as CPD and what members recognise as value.

Data driven CPD is not a trend; it's a strategic imperative.

Hitting the Bullseye with Association Education

Summary: As associations adapt to changing workforce needs, aligning education with career paths, offering alternative credentials, and integrating programs into employer needs creates significant value. This "bullseye" approach strengthens member experiences, non-dues revenue, and positions associations as vital education providers in their industries.

As the employment market has evolved in recent years, so too has the demand for more targeted and sophisticated approaches to adult education and training. Digital transformation initiatives, the rapid expansion of artificial intelligence and automation, and the dynamics of global trade are just a few of the key factors that have contributed to a growing focus on reskilling, upskilling, and general workforce development.

According to the Association for Talent Development's *2023 State of the Industry* report, the average organization invests US $1,220 per employee in learning. In the U.S., the amount of state funding allocated to workforce development more than doubled between 2011 and 2020. While the federal growth rate lags behind the states, investment nonetheless approaches $30 billion annually. Additionally, the global continuing education market was valued by some sources at US $33.55 billion in 2022 with projections for growth to $US 58 billion by 2030. These figures suggest a major and growing focus on ensuring adults are prepared for productive careers and are supported in learning throughout their working life.

Associations, of course, have a major role to play in this situation. As leading providers in what we characterize as a third sector of education (following K-12 and higher ed), associations provide education as a core part of their missions and value propositions as well as an important source of the non-dues revenue that is increasingly critical for sustainability. Our research, combined with extensive experience consulting with a wide range of organizations, suggests that successful associations are beginning to center their educational strategies around employment market needs.

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Bio 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 of the long-running Leading Learning Podcast, a valuable resource for learning business professionals.

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Jeff Cobb and Celisa Steele

Where the Data Points

At the end of the past several years we have conducted a survey to determine how organizations will focus their educational efforts and resources in the coming year. We ask about a range of possible focus areas – fourteen, in total – to determine whether organizations are already pursuing these areas, plan to in the coming year, or have no plans to. For 2024, three areas stood out for us as potentially related when it comes to how associations create significant value in supporting not just the individual member but also employers and the broader profession or industry that the organization serves. These were:

- Aligning offerings with specific career or job paths relevant to learners—e.g., through a competency model, learning pathways, or targeted curricula – *83.5 percent of respondents reported already doing or planning to pursue*
- New or alternative approaches to credentialing, including certificate programs, microcredentials, and digital badges – *73.4 percent of respondents reported already doing or planning to pursue*
- Integration of educational offerings into the learning and development programs of employers in a field or industry or into general workforce development needs – *69.4 percent of respondents reported already doing or planning to pursue*

Take those three together—the paths (career or job paths), alternative credentials, and then satisfying an employer need or general workforce development need—and picture them as a Venn diagram with three intersecting circles. Right in the middle, where the three circles overlap, you get something a bit magical.

When associations provide education and training offerings that align to a career path or specific job paths, offer a credential around the path that is viewed as valid and useful in the employment market, and do all of this in a way that integrates into the programs and the needs of the employers in field or industry they serve, tremendous value is created for all stakeholders. That's the bullseye for association education.

Why It Matters So Much

As many association leaders have already realized, member expectations for educational experiences have risen significantly, particularly in the aftermath of COVID. Both learners and their employers are seeking more value for their investments in education, both face-to-face and online, and traditional conference and online education offerings are increasingly perceived as not providing that value. In a marketplace where the competition is high for learners' attention, for their wallets, and for their employers' wallets, being able to hit the bullseye can really stand an association out as a third sector education provider to its specific field or industry.

Admittedly, hitting the bullseye described here requires a level of strategic focus and resources that are beyond what many associations have been accustomed to dedicating to their educational programming. But, increasingly, delivering this type of value won't be optional – at least to the extent that education is a core part of an organization's value proposition and non-dues revenue strategy. Members and employers simply have too many other options and many of those options are shifting in the direction described here. Now is the time to pull back, consider the learning paths, credentials, and workforce support your organization can provide – and then aim for the bullseye.

What questions should boards be asking in relation to revenue generation?

Summary: Boards should ask questions regarding revenue diversification, risk management, and technology's impact on costs and opportunities. Key considerations include leveraging sponsorships, education, AI, and brand partnerships while aligning strategies with evolving member expectations and fostering a sustainable, innovative income model.

The stability, viability and sources of revenue for associations are all under the microscope at boardroom tables across the globe.

In a continuously evolving landscape affecting the long-term financial health of associations, what questions and scenarios should boards be thinking about to mitigate these challenges to ensure their organisation remains sustainable for the long term?

The Challenges

First, boards must look at the challenges. We've seen this trend for a while now, however for some sectors, significant changes on the dependability of traditional revenue streams such as membership fees and conferences, are reducing as a percentage of turnover.

The recent International Congress and Convention Association (ICCA) Annual Association Survey (released May 2024) revealed a 3% decline for each of these types of revenue sources compared to the previous year's survey (while publications, advertising and other sources all saw uplifts of 2-3%).

The real trend here that is sneaking up on associations, is a reduction in the reliance on large sources of income and profit, and a shift towards revenue diversification. Associations looking to diversify revenue streams need new ideas, foster a commercial mindset, matching new strategies with the right resourcing and an understanding of risk appetite.

Digital Considerations

The rapid pace of technological advancement offers opportunities but also significant challenges, particularly around the increased costs of digital platforms and leveraging data efficiently, to reveal untapped opportunities to monetise or develop products based on the data analysis.

An annual audit of these systems is necessary. Organisations need to ask and understand what they are using, what has changed, what the alternatives are and how they can be using technology better.

Associations should also consider how they balance member, volunteer and stakeholder expectations, and organisational efficiency, with the increased cost of technology licenses and flow-on costs such as website hosting and cyber security.

Workforce Shortages and Skills Gaps

The gap in essential skills, particularly in IT, business development, and marketing, is more pronounced across many industry sectors, making the delivery of professional services harder and more expensive for associations.

Associations willing to upskill team members or outsource key skills such as strategic communications, technology design and procurement, will see greater benefits. As will those putting effort into attracting the right people and retaining talent.

Expectations Vs Delivery

Added challenges come from members' expectations of what value they are getting from their membership. In an era of rising living costs, individual membership fees are being compared to a larger plethora of costs – professional and personal. Like business memberships, we will see a demand for greater value and considerations for return on time. That is, is the time needed to commit to the association worth it? Associations proactively working on their value proposition will protect their membership revenue and engagement into the future.

Members' expectations are that their association's technology is integrated and seamless, communications are personalised and tailored, and their value for money should get them added direct benefits from their membership.

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Bio As Founder and CEO of Mayvin Global, Associate Adjunct Professor University of Technology Sydney and specialist in revenue generation, Deanna Varga has worked with over 30 Australian and international associations and serves on the boards of Transport Heritage NSW, Australasian Society for Ultrasound in Medicine, and the PCMA Regional Advisory Board (Asia Pacific).

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How can Boards generate new income?

Associations with effective, diverse and independent directors on their boards have a more stable foundation from which to build more value, work towards their mission, and look to de-risk their revenue streams. Boards with no independent directors are missing out on the cross-fertilisation of ideas and deep knowledge about different ways of doing business. Those without cannot tap into skills gaps and expertise from outside their sectors.

Creating new avenues of income isn't easy, or instant, and comes with inherent risk, but future proofing the organisation means focusing on future profit streams.

Some ways to generate income could include:

1. Sponsorships

A key revenue stream for many associations, it is important that this is seen as a two-way partnership, and not a transaction favouring one over the other. This includes transactional sponsorship arrangements, but it's those that are multi-year, multi-faceted dual problem-solving contracts that give the most value to both parties. Associations that have excelled at this include Australasian Institute of Mining and Metallurgy and Records and Information Management Professionals Australasia.

2. Education

Many associations now see on-demand and online education as revenue streams. For example, Optometry Australia's free virtual conference boosted member engagement and provided valuable data on attendee interests. This data can attract future sponsors, and popular content can be repackaged for paid access—turning a free event into a foundation for future revenue.

3. Brand Leverage

In the corporate world, influencers or known personalities often lend their endorsements to boost brand advantage. Similarly, associations like CHOICE (Australia), Consumer (New Zealand), and De Teste (Germany) generate revenue by licensing their trusted logo as a "seal of approval" for products that have undergone rigorous quality assurance standards. This endorsement assures consumers of alignment to various standards. Companies pay to use these logos due to the strong consumer trust in these brands, providing associations with substantial revenue and greater visibility, particularly among non-members.

4. 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.

5. AI

Associations are increasingly using AI to tailor member experiences and streamline operations, leading to enhanced engagement and efficiencies. AI-driven marketing, event management, member surveys (and analysis) and content curation are just a few areas where AI is making a significant impact. Like with any other platform, AI is a tool and should be used as such, it's not the ultimate solution or fixer over human interactions to source new revenue options.

Boards play a key role in ensuring the association is making a profit and is a sustainable and stable organisation, delivering on its purpose for the long term. Profitable associations attract great talent, try new things and take more risks.

My advice to Boards is to listen and learn from others, don't expect to have all the answers in the room, mitigate your risks and know your risk appetite.

There is great opportunity for association boards to be proactive and innovative, leveraging technology and strategic insights to expand, improve and stabilise revenue streams for years to come.

To read more about Revenue Diversification, read Mayvin Global's white paper available at www.mayvinglobal.com.

Association Sponsorship – Embracing change, AI, Data and the Member Experience

Summary: Associations must evolve their sponsorship models by embracing AI, data analytics, and a focus on member experience. AI personalizes and streamlines sponsorships, while data-driven insights enhance ROI. This shift transforms sponsorships from transactional to experiential, creating deeper value for members and sponsors.

Sponsorship has long been an avenue for associations and member organisations seeking a competitive edge, industry leadership, member value and new revenue streams.

Technology continues to reshape industries and associations must evolve their sponsorship models to maintain relevance, member value and sponsorship revenue. Artificial intelligence, data analytics, and the shift from member engagement to member experience are transforming how associations connect with sponsors and members to create more personalized, meaningful, and measurable sponsorships.

AI – Another Tool In The Sponsorship Toolbox

At its heart, sponsorship is all about people, the connection of value, and business-to-business relationships. AI doesn't remove this. Instead, AI can arm association sponsorship seekers with the tools needed to optimise sponsorship opportunities. AI can be like a team of analysts and marketers at an association's fingertips, simplifying and accelerating the learning curve and providing a never-ending source to the creation of content, ideas and activations.

One of AI's most significant impacts on sponsorship is the ability to personalize experiences at scale. For example, AI can be used to create highly personalized member experiences by recommending relevant sponsor products or services based on past interactions and preferences. This ensures that members are exposed to sponsorship content that is likely to be of interest to them. AI can also power predictive analytics, helping associations forecast which types of sponsorships are likely to perform well based on past data and emerging trends.

AI may also significantly streamline sponsorship management. AI can help to match sponsors with relevant member segments, review emails and content, create reports and automate follow-ups. Although these tasks still require a human touch and AI can't and shouldn't replace many vital sponsorship processes like discovery sessions, and face-to-face meetings, AI can reduce the time and resources required in many sponsorship areas.

The Shift To Data-Driven Sponsorship

Although changing, some association sponsorships are often standardized, sometimes with minimal insight into how the sponsorship performed, or which segments of an association's membership were most engaged. Data has become a critical sponsorship asset, allowing associations to access vast amounts of information about members, such as demographic data, behavioural insights, event attendance, content consumption and social media activity. Furthermore, evaluating sponsorship effectiveness in real-time through metrics like engagement rates and conversions allows organisations to make data-informed decisions. This enables associations to have an 'always on' approach to sponsorship, continuously refining and optimising sponsorship offerings.

Associations themselves are best placed to understand their target audience(s). This coupled with a data-driven approach to understanding target audiences through data analysis helps associations select suitable sponsorship opportunities and create sponsorship packages that are far more tailored and targeted. Rather than offering a "one-size-fits-all" or, a "gold-silver-bronze" sponsorship package, associations can work with sponsors to develop personalised offerings that align with the specific interests and needs of members.

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Bio Kayne Franich is the Member Services Manager at Property Council New Zealand. With over 15 years within membership organisations, Kayne has led the membership services, growth, retention, marketing, engagement and sponsorship strategies for membership associations in New Zealand and the UK.

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Furthermore, data enables associations to demonstrate clear ROI to sponsors. Tracking member engagement metrics and members experiences, associations can arm sponsors with detailed reports on how sponsorship is performing, who is interacting with content, and what results are being driven in terms of brand awareness and/or lead generation.

Enhancing The Member Experience

In the modern association world, the shift from transactional member engagement (the what) to member experience (the why) is paramount. Members expect highly personalised, seamless interactions, almost to an extent where members' needs are met before they even know they need them! This can, in some cases, require a mindset and strategic shift from viewing sponsorships solely as revenue generators, to opportunities to enhance and improve an association's offerings. Association sponsors must provide genuine value to members, whether that be through thought leadership and content, exclusive offers, solving problems or providing experiences that align with members' interests.

One way associations are working with sponsors to enhance member experience is through content-driven sponsorships and experiential marketing. This collaboration aims to create valuable content such as sponsored webinars, thought leadership, whitepapers, podcasts, or access to exclusive events, interactive workshops, or virtual reality experiences. These experiences provide members with valuable insights, access and information, thus creating more meaningful and impactful sponsorship opportunities.

Personalisation is also a key aspect of enhancing the member experience through sponsorship. For example, an association might offer members the option to choose from a range of sponsored content or experiences based on their interests. This level of personalisation ensures that members receive relevant and valuable experiences, while sponsors benefit from more targeted and effective engagement.

Looking Ahead: The Future of Association Sponsorship

The future of association sponsorship is being shaped by the intersection of data-driven decision making, leveraging AI and technology, and an unwavering focus on member experience. As technology continues to advance, associations are well placed to adopt a more sophisticated approach to sponsorship and by doing so, this can create stronger, more collaborative and more valuable partnerships with sponsors that deliver greater value for both sponsors and members.

Associations who remain open to new ways of working, who embrace change and technology, will differentiate themselves from their competitors and continue to attract and meet sponsor, and member needs into the future.

Leveraging Insights from Corporate Sponsor Interviews to Boost Sponsorship Program Success

Summary: Conducting interviews with corporate sponsors reveals that companies value business development, brand visibility, and thought leadership over traditional sponsorship benefits like logo placements. Associations should engage sponsors in meaningful discussions about their objectives, offering customized, year-long partnerships to build stronger, more impactful relationships.

Fifteen years ago, I began conducting interviews with corporate sponsors and partners—and I haven't stopped since. These conversations have provided invaluable insights into what drives companies to sponsor and partner with associations, allowing us to tailor our sponsorship programs for maximum impact.

The Beginning: Understanding a Disconnect

In 2009, when I was appointed Vice President of Corporate Partnerships for a national association, I realized we had a problem. We had developed a great new corporate partnership program, but the economy was in a downturn, and I knew our partners were not seeing the value they expected. To gain a clearer understanding, I hired a consultant to conduct confidential interviews with our top 10 year-long partners.

The consultant's summary of these interviews was eye-opening:

- Executives from all 10 companies described our corporate partnership program in almost the exact same terms.
- However, their descriptions differed greatly from the way our association's staff described the program.

While our association segmented the corporate partner benefits into categories like conferences, website, publications, communications, and Board/VIP meetings, the corporate partners viewed the value of the program differently.

What Companies Really Want from Sponsorship

Each corporate partner identified three primary value propositions that mattered most to them:

1. **Business Development**: Opportunities to build relationships and generate leads.
2. **Brand Visibility**: Creating awareness and differentiating their company in the market.
3. **Thought Leadership**: Positioning themselves as experts.

Recognizing this gap in perspective, we immediately reframed our partnership benefits to emphasize these three core areas. The result? All our corporate partners remained committed, even through the economic slump.

The Power of Continuous Feedback: 100 Interviews a Year

When I transitioned to a corporate sponsorship advisor for associations eight years ago, I integrated sponsor interviews into my research process. My colleagues and I conduct around 100 interviews annually with corporate executives who make decisions about sponsoring or partnering with trade and professional associations. These associations – large and small – cover a wide range of industries, professions, and trades.

Interestingly, regardless of the type of association or the products and services the companies provide, the feedback tends to be consistent. Companies are looking for meaningful engagement, not just visibility.

Why Some Companies Decide Not to Sponsor

Many companies are not interested in sponsorship benefits that simply provide visibility, recognition, logo placements, or a shout-out from the podium at a conference. As one executive put it, “Recognition at a conference is probably the least important driver of sponsorship success.” Another echoed this sentiment, saying, “And guess what? I don't need a bunch of banner ads! Our industry is bombarded by that.”

Bio Bruce Rosenthal is a corporate sponsorships strategist dedicated to helping associations develop transformational sponsorship and partnership programs. These programs are designed to increase revenue, enhance member value, grow the association's brand, fulfill the association's mission, and ensure organizational sustainability. He identifies the latest sponsorship best practices, trends, and opportunities.

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Bruce Rosenthal

Bigger is Not Always Better

This feedback challenges the traditional approach of pricing sponsorships based on the size of the audience – people in the room, number of readers, number of people on the mailing list. Bigger isn't always better.

One executive explained why his company stopped sponsoring a large association conference: "We wanted to reach 400 specific attendees based on our target client audience; we couldn't find those 400 among the 4,000 attendees." Another company shifted its sponsorship from a large association to a smaller one, with the same fee, to "be the big fish in the small pond, not the small fish in the big pond."

Shifting Budgets and Measuring Impact

A common misconception among associations is that when companies don't renew their sponsorships, they are reducing their marketing budgets. However, company executives tell a different story: "My sponsorship pie is the same size this year as last year. However, this year I'm cutting bigger pieces." Some associations will get more sponsorship support, while others receive less or none, depending on the value.

Moreover, companies are becoming increasingly data-driven in evaluating sponsorships. Unlike a few years ago, when executives told me they support an association out of long-standing tradition, today they use precise metrics such as ROI (Return on Investment), CAC (Customer Acquisition Cost), and KPI (Key Performance Indicators) to gauge sponsorship value. One executive noted, "We track very closely every conversation, every opportunity; it's a requirement to justify the [sponsorship] expense."

The Competitive Landscape: More Options Than Ever

In today's competitive market, companies have numerous ways to achieve their business objectives—associations, trade publications, for-profit conferences and expos, social media, online communities, and their own branded conferences, webinars, and reports.

One executive mentioned, "For the money, time, and energy the sponsorship involves, I can create other opportunities."

The Need for Customization and Long-Term Partnerships

A consistent theme across our interviews is the preference for customized, year-long sponsorship packages rather than conference or à la carte sponsorships. One executive shared, "Our company markets 365 days a year; a conference sponsorship is only 3 days a year." Another expressed a strong preference for a "year-round [sponsorship] model and less of a piece-by-piece ad hoc model."

A Wake-Up Call for Associations: Know Your Sponsors

It's clear that associations must better understand why companies choose to sponsor them. When I ask executives, "Does the association understand your company's business objectives and marketing goals?" I often get blunt answers.

One executive said, "The association has no idea; they've never asked us." Another pointed out, "We want an in-depth conversation about each other and industry issues—not a sales pitch of stuff."

Moving from "Corporate Partner" to True Partnership

Associations often refer to a company as "our corporate partner," but there is far greater value in genuinely "partnering" with that company.

To enhance the effectiveness of your sponsorship program, it's essential to engage in meaningful conversations with your sponsors. Ask about their business objectives, marketing goals, successful marketing strategies, and challenges. Listen carefully and ask follow-up questions.

Corporate executives will appreciate being asked for their opinions and input. You'll gain invaluable information that can help you develop tailored sponsorship or partnership proposals that resonate with each company, leading to stronger, more enduring partnerships.

By understanding and adapting to what companies value, associations can create more compelling and successful sponsorship programs that stand the test of time, as well as provide value for their association and their members.

The New Era of Sponsorship

Summary: Embracing AI means adopting a smarter, more efficient way of working that can drastically improve your sponsorship results.

Sponsorship is essential for most associations as it enables events, community programs, and member services. Given the importance of this revenue stream, it is essential for associations to be proactively adopting emerging practices that will improve their performance in this space.

There have been significant changes in the way associations attract and retain sponsors in the last few years. Associations relying on outdated methods to find, approach, and evaluate sponsors, are most certainly missing significant opportunities that can greatly enhance their association revenue generation capabilities.

The biggest driver of this is AI. AI has fundamentally transformed how sponsorship works. From streamlining your outreach to improving how you identify and understand potential sponsors, AI isn't just a tool—it's an advantage that helps you navigate the increasingly complex landscape of corporate partnerships.

Identify Sponsors Faster and More Effectively

The days of endless Google searches and attending numerous networking events to find the right contacts are over and introverts everywhere are rejoicing.

AI allows you to generate a targeted list of potential sponsors in under two minutes. It's like having an entire research team at your disposal, drastically reducing the time spent combing through corporate directories and LinkedIn profiles and yes, it has the names, emails, direct phone numbers and more.

AI efficiently scans data across the world to help you identify companies that align with your association's mission, values, and audience. Imagine finding sponsors that perfectly fit your organisation—without spending hours on manual research. That's the level of capability AI offers. By harnessing AI's capacity to analyse patterns and match data points, you can generate insights that would have taken days or even weeks of manual labour.

AI not only helps you identify potential sponsors faster but also reveals new opportunities you might not have even considered.

For instance, AI can pick up on trends within your industry and highlight emerging companies that are on the lookout for strategic partnerships. This predictive capability allows you to stay ahead of the curve and be the first to reach out to the most promising sponsors, giving your association a competitive edge.

Efficient Background Checks

When evaluating sponsors, it's crucial to ensure they align with your values and uphold a positive reputation. AI can quickly sift through public records, news articles, and social media, providing a comprehensive overview of your potential partner in seconds. This allows you to instantly assess a company's public perception and identify any potential red flags, making the vetting process far more efficient than manual research.

By automating the background check process, AI allows you to reallocate time to more strategic tasks, such as developing deeper engagement strategies and nurturing the partnerships that are most likely to succeed. This ability to vet sponsors thoroughly, yet quickly, means you can focus on quality over quantity, ensuring that every relationship you build adds substantial value to your association and your members.

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Bio Julian Moore is well-known across Australasia for helping associations and other nonprofits boost their revenue through high-value partnership and sponsorship programs. As an unabashed technology geek, Julian has a deep understanding of the AI world and how associations can use AI to improve their operational performance and make a greater impact on the sectors they represent. Having worked extensively in Australia, New Zealand, and the UK, Julian has a knack for making complex topics easy to grasp.

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Optimised Outreach for Better Results

AI is also transforming how you connect with sponsors. Picture an AI that analyses previously successful outreach emails to craft messages tailored specifically to each potential sponsor's interests and priorities. Personalisation is key to standing out, and AI allows you to personalise outreach at scale, making each sponsor feel uniquely valued.

This approach is not only smart and efficient but also highly effective in securing meetings.

By making data-driven adjustments, you can enhance the emotional and rational appeal of your email, thus improving your chances of getting a response.

Imagine being able to send personalised emails, videos, tweets, Tiktoks etc to dozens of potential sponsors in minutes rather than hours. AI can craft messages that are specific, timely, and directly relevant to each recipient's interests and goals. Moreover, AI can even help determine the optimal time to send your messages to increase the likelihood of them being read and responded to. This kind of precision is nearly impossible to achieve manually, but with AI, it becomes a standard part of your workflow.

Data-Driven Follow-Up

Often, the key to securing sponsorship lies in timely and strategic follow-ups. AI can manage follow-ups, monitor which sponsors have shown interest, track email open rates, and even determine the level of engagement of each contact. This data allows you to plan follow-ups that are perfectly timed and aligned with the sponsor's current level of interest.

Instead of generic reminders, AI can help you craft follow-ups that acknowledge past interactions and bring added value to the table.

For example, if a sponsor clicked on a link about your latest community initiative, your follow-up email can delve deeper into that specific program. AI enables a level of responsiveness that significantly improves sponsor engagement, showing them that you're paying attention to what matters most to them.

Your Competitive Edge

If you're still approaching sponsorship with traditional methods—manual research, generic outreach, and a lot of guesswork—it's time to rethink your approach.

AI has already revolutionised sponsorship workflows, offering a faster, more informed, and strategic way to find and engage sponsors. Leveraging AI means that you're no longer guessing; instead, you're basing your strategy on clear, data-driven insights that can significantly increase your chances of success.

However, it's important to remember that AI's role is to get you in the door. It can help you find the right sponsors, identify the right opportunities, and connect with the right people—but once you're in that meeting, it's all about you.

Building relationships, negotiating, and creating long-term partnerships are skills that only you can bring to the table. AI enhances your capabilities, but it doesn't replace the human touch that's crucial in fostering genuine partnerships.

AI allows you to free up valuable time, letting you focus on what you do best: engaging with potential sponsors on a personal level. The insights provided by AI can serve as conversation starters, offering valuable context that makes your discussions more meaningful and relevant. But the ability to build trust, communicate your association's vision, and inspire others—that's where your unique talent comes into play.

So, are you ready to stop missing out on potential sponsorships? Are you ready to see how AI can enhance your sponsorship strategy, streamline your processes, and ultimately bring in more funding for your initiatives?

If not, get ready—the future of sponsorship is here, and it's smarter, faster, and more efficient than ever before. The sponsorship landscape is evolving, and those who embrace these technological advancements will undoubtedly come out on top.

Five Ways to Earn Board Buy-In for Your Corporate Sponsorship Strategy

Summary: To earn board buy-in for a corporate sponsorship strategy, identify an enthusiastic board advocate, clearly communicate sponsorship value, ensure alignment with the association's mission, create comprehensive sponsorship guidelines, and establish roles and reporting mechanisms. This fosters transparency, accountability, and long-term success.

In the complex ecosystem of associations, executive directors and other leadership often face the challenge of aligning their board with strategic initiatives, particularly when it comes to corporate sponsorship. Sponsorships can significantly enhance an association's ability to meet its non-dues revenue goals, but without board buy-in, launching an effective strategy can be an uphill battle. Here are five key strategies to help association leaders secure the necessary support from their boards.

1. Identify an Advocate on Your Board

Having a champion within the board who supports your sponsorship strategy can be a game-changer. Identify a board member who not only understands the value of corporate sponsorships but is also enthusiastic about the potential they hold for the association. This advocate can help articulate the benefits of the strategy to other board members, work to alleviate concerns, and foster a more receptive environment for discussion. An ideal advocate is someone who possesses strong persuasive skills and holds influence within the board. By leveraging their support, you can bridge gaps in understanding and resistance, ensuring a smoother approval process.

2. Clearly Articulate the Value Proposition

The first step in gaining board approval after identifying an advocate is to clearly articulate the value of a corporate sponsorship strategy. This involves demonstrating how sponsorships can support the association's mission and financial health. If available, present data and case studies that illustrate successful sponsorship outcomes in similar organizations. Highlight how these partnerships can provide not only financial benefits but also strategic value such as increased visibility, member engagement, and enhanced programming. Ensure that your presentation addresses the specific interests and concerns of board members, showing a direct link between sponsorships and the organization's long-term objectives.

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3. Demonstrate Alignment with the Association's Values and Mission

Board members are custodians of the association's mission and values, and they will need assurance that any corporate sponsorships align with these core elements. Prepare to demonstrate how potential sponsorship relationships will support the association's mission and reflect its values. This might involve selecting sponsors with similar ethical standards, sustainability practices, or industry relevance.

4. Create Corporate Sponsorship Guidelines

To facilitate a structured and transparent approach to sponsorships, create comprehensive corporate sponsorship guidelines. These guidelines should outline the types of companies that align with your association's values as well as those industries your association will not engage. Include criteria for sponsor selection to avoid potential conflicts of interest and maintain ethical integrity. Clearly defined guidelines help ensure that all board members are on the same page and that sponsorships are managed consistently and professionally. This structure not only streamlines the process of securing sponsors but also aids in maintaining a clear, strategic approach that board members can support and advocate for confidently.

5. Establish Roles and Reporting

For a corporate sponsorship strategy to succeed, it is essential to establish clear roles and responsibilities and set up a schedule of reporting. Define who within the association will be responsible for managing sponsor relationships, who will handle the financial aspects, and who will oversee the fulfillment of sponsorship benefits. It's also crucial to determine how information about sponsorships will be communicated to the board. Regular reports should be provided, detailing progress against objectives, issues encountered, and the overall impact of the sponsorships on the association. This transparency ensures that the board remains informed and engaged and can provide timely guidance or intervention if necessary. Regular reporting also fosters a culture of accountability and continuous improvement, which can significantly boost the long-term success of the sponsorship strategy.

Earning board buy-in is crucial for the successful implementation of a corporate sponsorship strategy. By identifying a board advocate, clearly articulating the value, ensuring alignment with organizational values, creating structured sponsorship guidelines, and establishing clear roles and effective reporting mechanisms, association leaders can effectively secure the support they need. With the board's backing, the path to enhancing the association's capabilities and impact through strategic sponsorships becomes much clearer.

This approach not only paves the way for growth and financial health, but also reinforces the board's role as strategic partners in steering the association towards its mission-driven goals.

Your Association Magazine Reimagined: Enhancing Member Value and Growing Revenue

Summary: Associations must reimagine their traditional print magazines to remain relevant and drive revenue. By focusing on high-value content, fostering community, gathering member feedback, integrating digital strategies, and developing robust revenue plans, associations can enhance member engagement and attract advertisers while staying competitive.

As associations navigate the complexities of a post-COVID world, many have swiftly adapted by rolling out virtual events, expanding digital platforms, and finding new ways to connect with members. Yet, amid an era of unparalleled innovation for associations, one cornerstone of member engagement remains largely unchanged: the traditional association print magazine.

For most associations, print magazines continue to play a vital role, both in engaging members and driving crucial advertising revenue. However, the reality is that in their traditional form, print magazines are struggling to keep pace with the demands of a new era. According to Association Adviser's 2024 Association Benchmarking Report, only 34.4% of associations cite print magazines as a "very/extremely valuable" member engagement tool — a decline from the previous year. This is particularly concerning given the significant resources required to produce a magazine, especially when its ability to fully engage members is diminishing.

This low engagement poses a significant challenge at a time when associations are under immense pressure to increase non-dues revenue, which the same study identified as the No. 1 challenge by association leaders. When a magazine fails to captivate its audience, the ripple effects are felt across the organization, limiting member retention, new member recruitment, and revenue growth.

Given these evolving challenges, it's clear that the traditional association magazine must be reimagined. To remain relevant and effective, association magazines must embrace new strategies that enhance member value and support revenue growth.

Five characteristics of a future-forward association magazine

Following are ways your association magazine can evolve to meet the changing needs of both members and advertisers.

1. Feature high-value, evergreen content

To elevate their magazines, associations should focus on delivering high-value, "evergreen" content that transcends the fleeting nature of updates and activities. Instead of using magazines as pseudo-bulletin boards with updates on association business and member activities, associations should create compelling, in-depth articles, thought leadership pieces, and visually rich content that members will want to keep and revisit — more akin to a coffee table book that members can proudly display in their workplaces.

This approach not only enhances the magazine's perceived value but also strengthens member engagement by offering timeless insights and inspiration. By prioritizing quality over quantity, associations can ensure their magazines remain relevant and treasured long after publication. And a longer shelf-life for members directly translates into more value for advertisers.

2. Foster a sense of community

Association magazines should foster a sense of community that not only adds value for current members but also attracts new ones. By consistently producing fresh, inspiring content that reflects and reinforces the association's mission, the magazine becomes a vital touchpoint for member values, uniting the community around a shared mission and goals.

Embracing a diverse range of voices, including those from underrepresented demographic groups, enriches the content and strengthens the sense of inclusivity. This approach not only builds a more engaged, cohesive community but also positions the magazine as a cornerstone of member identity and a powerful tool for growth and retention.

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3. Create member feedback loops

To keep pace with changing member and advertiser needs, association magazines should establish recurring feedback loops that drive continuous improvement. By regularly gathering and analyzing member feedback through surveys, focus groups, or virtual reader panels, associations can ensure their magazine evolves alongside member needs and expectations.

This commitment to innovation transforms the magazine into a dynamic, living entity that adapts to shifting needs. Iterative content improvement, guided by member insights, ensures the magazine remains relevant, engaging, and valuable. Embracing this approach creates brand ambassadors and fosters a deeper connection with members, making the magazine an integral part of their experience with the association.

4. Develop an integrated digital strategy

An integrated digital strategy allows association magazines to unify their content across print, video, digital, and social platforms, creating a cohesive brand voice that resonates with members. This approach meets members where they are, increasing touchpoints and enhancing engagement across multiple channels. By seamlessly integrating content, associations can foster deeper connections with their audience, driving member loyalty.

Additionally, a digital-first approach opens up new revenue streams, such as sponsored content, targeted advertising, and premium subscriptions, making the magazine not just a communication tool but a dynamic platform for growth and innovation.

5. Build a robust revenue plan

When it comes to print magazines, associations need to start thinking like for-profit publishers, prioritizing revenue growth as a key objective. Developing a robust revenue plan involves diversifying income streams beyond traditional advertising. This can include creating premium content, offering sponsored content opportunities, launching targeted digital campaigns, and leveraging data to offer personalized advertising solutions.

By thinking strategically about monetization, associations can transform their magazines into revenue-generating assets that not only cover production costs but also contribute significantly to the organization's financial health, ensuring sustainability and continued member value. This shift in focus allows associations to better serve both members and advertisers.

The case for outsourcing

While adopting these best practices will be transformative for your association magazine, many organizations are already overwhelmed and understaffed as they strive to innovate in other areas, making the prospect of a magazine redesign daunting. For those facing these challenges, outsourcing magazine editorial, design, and production to a third-party partner can be a strategic solution.

A partner who understands your mission, adapts to your culture, and embraces your values can revitalize your magazine without overextending your resources. This allows your team to focus on other critical tasks while ensuring your magazine not only maximizes value to members and advertisers but aligns with other strategic objectives.

The importance of Digital Member Value and Digital Revenue

Summary: Digital engagement is essential for associations to attract, retain, and engage members across generations. By treating digital offerings like other member values—coordinating content, optimizing monetization, and leveraging member-exclusive perks—associations can enhance engagement, drive non-dues revenue, and stay competitive.

Associations' big financial and operational challenges

This is arguably the first time in history that four (and some might argue five) distinct age groups are not only members of the same associations but also in the workforce together. It shouldn't come as a surprise that the way Gen Z, Millennials, Gen X, and Baby Boomers interact with the world differs. So logically, the way they engage with their chosen association will differ.

Given the trends from the past couple of decades, we can tell that digital engagement will become key to recruiting, engaging and retaining members. As generations who were raised in a digital environment become a larger part of membership, so too will your offerings have to be online. This digitally savvy segment is also accomplished at finding answers on the internet, so competing resources will be widespread and, in some cases, free. The more they feel their own research fills their needs, the less likely they are to renew, let alone engage. You can find proof of this easily enough. If members join for a specific offer (e.g., an event, a course) but lapse within 2-5 years, your recruitment investment isn't translating to long-term engagement or retention.

Let's face it, the impact on the number and engagement of members has a direct correlation to overall revenue, as member size and engagement also impact your non-dues revenue categories like sponsorship, exhibit space, course purchases, and other member services.

Declining digital engagement will have a compounding effect as time goes on. The clock is ticking, and this engagement issue needs to be resolved ASAP. What's an association to do?

Treat Digital Member Engagement Like Your Other Member Values

Digital engagement doesn't have to mean a learning curve for your association. If you already have a website and an online presence, you're doing well. Now you simply need to start treating it as any of your other member values. Consider your magazine, learning management system, or annual conference. You have plans, systems, and likely a calendar or schedule of content organized for them, right? Copy that process for your website. Make an annual content calendar, organize it so it is easy to find what members want, and be sure to plan for sponsors. When banner sizes, placement, and prices are determined, they can be added to your media kit for sale. You don't have to reinvent the wheel. Just move it from a wagon to a car.

Now, let's look at your website. If you are like most associations, it's owned by whoever owns IT. It was probably designed without considering content experience and journey mapping or monetization. Your content is likely organized by medium across different platforms (videos on YouTube, podcasts on Spotify, webinars on a third-party site, articles and blogs somewhere on your site). There are multiple content calendars, each owned by different departments working independently. Then, there is the lack of monetization. When (like your other member values) it should be optimized for all the revenue categories: advertising, sponsorship, content marketing, pay-per-view, and subscription. And revenue influencers like lead generation of members or pay-per-view content outside your LMS.

If any of this sounds familiar, you're not alone.

Now imagine if this was all coordinated together the way that your annual conference, LMS, and magazine are. What would it mean? Current and potential members could find all the content they need in one place. No more do they need to know the medium to find the content regardless of the format. Access could also be designed to demonstrate membership perks, like member-only access to sessions. Or perhaps some of this content is gated by your CRM, leading non-members to a place of "trying before buying," allowing you a chance to nurture that visitor into a member.

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Like a magazine that has recurring departments, you could have “channels of valuable and authentic content” that repeat at a defined frequency, building an audience and making it easy for members to find. You can also start generating non-dues revenue from this model. Enough to make everything above FREE or, even better, profitable (like the other member values above).

This level of coordination can help create the right content, for the right members, in the right formats.

And, as a bonus, it will be easy to find, consume, and act upon. With each engagement, you can generate non-dues revenue to fund an ongoing content calendar. And with all of this data in one place (on your website), you are able to use it for continual improvement.

The Path to Digital Transformation

So, here is the good news!

You already know how to do most of the work; it’s just about translating it to a digital medium. Your first step is to organize your teams so they can transfer the necessary coordination practices from a magazine, event, or LMS to your digital platform. When the medium, content, and monetization plan are working in harmony, you can achieve predictable results.

And because the amount of revenue you can generate is substantial, you will be able to plan for an appropriate level of resourcing and investment (technology, people, content), where you need it. It could be a media platform for your website or a content strategy for the development of video, audio, and multimedia formats. Perhaps a strong digital sponsorship, advertising, and content marketing strategy to fund ongoing investment in your new digital member value.

Although the revenue can fully subsidize the cost of providing this digital member value, the real reason to do this is to stay relevant for your members. They have the world at their fingertips with the internet. You can curate an experience for them with expertise and information only your association has the credibility to achieve.

Every day your digital competitors are getting stronger, but they do not have the authority and reputation of an association. That’s your strength. Use it to transform your website and digital engagement into a true member value that also drives non-dues revenue to make it sustainable. Then, your association will be ready to engage all generations.

Good luck on your digital transformation journey!

Pricing Governance for Ongoing Success

Summary: Maintaining consistency and transparency in pricing is vital for stakeholder fairness, and deviations require CEO approval. A clear pricing and value strategy, annual reviews, and centralized approvals prevent inconsistencies. Discounting and promotions must follow pre-approved guidelines, and price changes are communicated with value justification.

It is important to maintain consistency and transparency in pricing policies across the organization to ensure fair treatment for all stakeholders.

Therefore, the following pricing policies are applicable to all teams, products, and services, and any deviations or variances from these policies require CEO approval.

This ensures that any pricing decisions made are thoroughly vetted and aligned with the organization's mission and goals. The CEO will review and approve any pricing changes that deviate from the established policies to ensure they are in line with the overall pricing and value strategy of the organization.

By having a centralized approval process, the organization can avoid inconsistencies and prevent any unfavorable outcomes resulting from pricing decisions.

1. Pricing and value strategy

Each product should have a clear pricing and value strategy inclusive of the target market, value delivery, pricing objectives, and pricing tactics. This should be reviewed by product annually.

2. Price and value setting

Price and value setting will be done in accordance with the organizational structure outlined above and the current product timelines below. Each product should be reviewed annually prior to the budgeting cycle and any work (data analysis, value analysis, pricing analysis) that must be done should be scoped for completion prior to budgeting approval.

3. Price and value changes

Any changes to price must be approved based on the above organizational structure and below product timeline with approvals prior to the budgeting cycle. Value adjustments should also be included, inclusive of any cost adjustments for additional resources.

4. Discounting

Discounts may only be offered with pre-approved guidelines. If a one-off discount is requested, it must be approved by both the Director of Pricing and CEO and documented with rationale for record keeping. An example would be offering a discount to a large group or sponsor.

5. Price promotions

Price promotions may only be offered with pre-approved guidelines. New price promotions should be incorporated into price and value changes for each budgetary cycle. An example would be adjusting an early bird rate for a conference.

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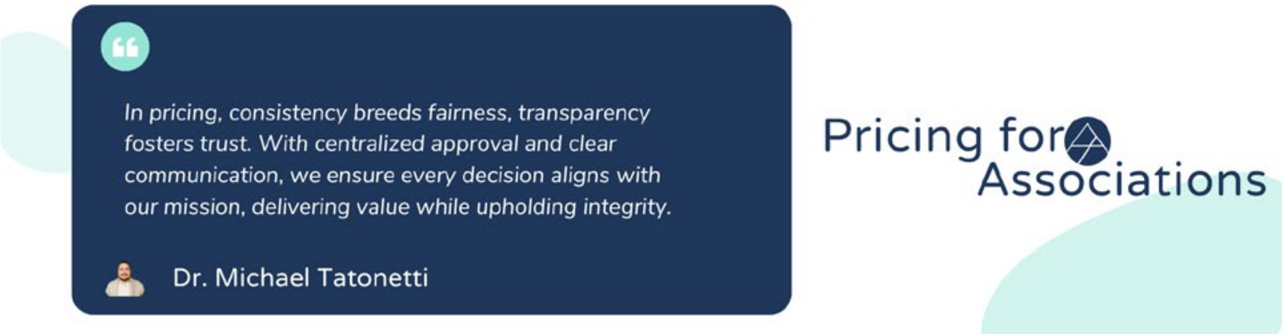

6. Price and value monitoring and analysis

Each product should be analyzed for specific metrics and KPI's by product for each budgetary cycle and documented for annual growth and justification of value delivery.

7. Price and value communication

Price and value changes should be communicated by department heads with CEO approval using the following format:

- Communicate how we have heard them over the past year (surveys, focus groups, etc.) to make value adjustments.
- Communicate how we are expanding resources and value delivery, and our price increase will enable the expanded growth of the program/ offering.
- Communicate how we are committed to ongoing fulfillment of our mission through the value we deliver to them.

8. Price compliance

This policy should outline any rules and regulations that must be followed to ensure that pricing practices are legal and ethical.

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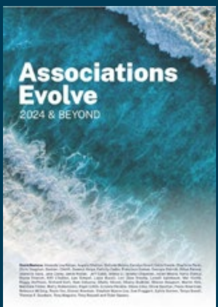

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