

# FIVE DIMENSIONS OF ASSOCIATION MANAGEMENT

Laurie Ford, Ph.D.

Associations have an important impact on our world in all its dimensions: economic, legal, political, social, cultural, technological, and the natural physical environment. This influence is produced by:

1. Creating a legislative voice for public policy to reflect the knowledge and commitments of its constituents,
2. Building networks of experts, and
3. Strengthening a field of endeavor through research, publications, and other communication.

To accomplish all this, Associations provide programs, products, services, and events – as well as managing member participation. Association leaders are also deeply involved in their member communities and the larger civic community. No wonder, then, that much has been written about how Association leaders manage it all. These pages summarize the five dimensions of Association management.

## 1. MISSION

Mission comes first – even before leadership. A statement of mission is more than a statement of purpose (*which is usually about viability and success*) and more than a statement of vision (*which is usually about the intended future*). A **mission** – coming from the same root as missive or missile – is a statement about **what is sent, delivered or provided** to the community of members and other key players.

Your mission statement identifies the value of the products, services, and communications that you **deliver** to your members and others. In these changing times, it is important to revisit this mission statement every three to five years, revising, refocusing or otherwise updating it in a fast-changing world. When you articulate a clear mission of service, you specify *what* benefits will be provided, *who* will receive those benefits, and *why*, i.e., the *value* those benefits are expected to deliver to those recipients.

## 2. PERFORMANCE

Association leaders work with their Boards to define a long-term future for the Association as a whole. Think **results**. What kind of outcomes do you want to see in the member community, and for all the constituencies you intend to impact? This defines the meaning of “performance” for your Association. Your Association’s performance will be observable – and measurable – in five different areas.

1. **Mission Performance:** These are the results that demonstrate your mission in action. All your organization’s products, services, and communications will be “trued up” to reflect this highest purpose.
2. **Constituency Performance:** All your programs, services, and activities showcase the strong commitment to your constituencies. Maintaining a permanent, ongoing process of discussion – dialogue and listening – helps you learn what is important to your members

and other customers. It goes beyond asking whether they like what you *already* give them: you also need to know more about the daily challenges they face in their world. What results and performance do *they* want, independent of what you currently provide?

3. **Marketing Performance:** Most Associations have barely skimmed the surface of all their actual *and potential* customers and markets. Using your mission to formulate a fresh marketing strategy increases the value of the information you gather about prospective customers and their interests. This supports innovative thinking and helps implement desired new results in the marketplace: programs, promotions, and prices.
4. **Financial Performance:** Financial results are an integral part of all staff jobs. Studying the real-world value of all your programs, products, and services will show you where to make improvements, where you could start new products or projects, and when to stop those that have outlived their usefulness.
5. **Manager and Staff Performance:** Your organization's people are the heart of the difference the Association makes in your member community and beyond. You can define that difference in terms of the results people produce in the other four areas of 'performance' listed above. Get specific about those results so that everyone can see and celebrate the accomplishment of improved performance for mission, constituency, markets, and finance.

### 3. ALLIANCES

**Your Community of Impact** = All the people you intend to serve  
+ All the *other* people who are *already* serving those people  
in a way that is consistent or aligned with your mission.

Formal or informal alliances are a major pathway to strengthening and/or expanding an Association's 'Community of Impact'. The Association leaders and Board members can forge powerful working relationships with businesses, universities, government agencies, and other non-profit organizations. These relationships can extend your Association's reach into the community that provides advantages to expand the success your members.

The people aligned with your mission, or doing similar work, are your natural relationships. At first blush, they may seem to be competitors, but the wise Association leader steadily deepens these relationships to create a valuable network of member-relevant organizations. Your network of formal and informal allies can focus on short-term objectives, long-term commitments, or simply remain potential resources for creating a desired future. These alliances, partnerships, and collaborative efforts can be developed for specific issues or long-term coalitions, whether around visions, missions or services.

Alliances can also strengthen lobbying effectiveness by increasing visibility and influence. Inter-organizational alliances are powerful political tools, increasing leverage and knowledge bases. Compatible organizations also support each other's work through respect, awareness, and project-sharing.

Finally, formal or informal alliances increase the size of your supportive community and opportunities to educate and inform people about your Association's impact and membership.

Some of these relationships can also be extended to develop new high-value products, services, or events for your members and/or others. Alliances can provide benefit to your members, expand your market, and create new relationships for the fulfillment of your mission.

#### 4. STRATEGY

A good strategic plan can carry an Association forward for 3-5 years, provided it has ‘Action Plans’ associated with every key strategic direction and decision. Annual updates to the strategic plan help build a strong future for your Association’s vital mission performance and for its long-term financial viability. This recurring planning process also develops good internal structures, processes, and communications to produce and manage mission performance.

The Action Plans that accompany every annual update to your strategic plan are critically important for good Association management. There are seven aspects of effective strategic Action Planning:

1. **Goals:** Concentrate on a few mission-critical goals, then be sure the goals and objectives of all managers, staff, and volunteers are aligned with the high-level goals. This keeps everyone’s work ‘mission-relevant’.
2. **Accountability:** Have your leader and staff responsibilities clearly spelled out to identify the kinds of results they will produce (*see the ‘Performance’ section above*). Support your staff to ‘keep score’ on their mission-relevant performance, so they can build a ‘results history’ for the Association.
3. **Work plans:** Have managers and staff map out the ways they plan to reach their mission-relevant goals, including time frames, communications required, and responsibilities or agreements for final results. You can use the same work plan format for all staff and volunteers to continuously clarify jobs, assignments, and evaluation dialogues.
4. **Tools:** Use a common scheduling system and standardize certain types of communications as much as possible. Have staff members and volunteers who are experts in their jobs create – and update annually – standard communication forms and/or checklists to spell out the best ways to accomplish their recurring tasks. This improves internal communication and also helps train new people in doing jobs properly.
5. **Evaluation:** Evaluate all five kinds of performance regularly: mission, constituency, market, financial, and manager-staff results (see section 2, above). You can even evaluate the planning and evaluation process itself. One job of Association leaders is to make sure the performance results for the Association as a whole are visible to everyone: so go ahead and hang that chart in the lunchroom!
6. **Resource development:** Work with your members and other funding sources to improve *their* performance or standing in the community. As you expand your ‘Community of Impact’, you take the message of your mission out beyond its traditional boundaries.
7. **New product/service development:** Review your non-dues revenue products and programs annually, as you review constituent feedback. Re-think the needs of your constituencies and your actual and potential markets. Your financial future is vitally

important – if you aren't financially viable, you have little capacity to give value to your members.

## 5. RESOURCES

Every Association has four primary resources and each needs to be managed to obtain real leverage in creating a successful future.

1. **Budget:** Multi-year budgets are organized by project or function, with cost and profit centers. Budgets are monitored and amended monthly – start with wish lists, then reduce it to priorities. Cash flow is monitored too. Keep *everyone* informed about what's happening financially – at least the basics – and find a way to present the numbers in a simple and easy-to-understand format. This can serve as a compass for making sound financial and mission-relevant decisions.
2. **Training:** Train your staff and key volunteers in the jobs and tasks that are most important, as well as in expanding their capacities for leadership, productivity, strategic thinking, communication, and service. These are the people who are your Association's future leaders and will ultimately be building long-term productive relationships with new members, allies, and customers.
3. **Organization:** Evaluate all Association functions and activities annually to identify what systems or practices should be improved or abandoned. Review your mission-critical jobs to see what clarification or support is needed to get better results and improved communications.
4. **People:** Put in place enough routine communications to support key players (Board, Staff, and Volunteers) in getting – and staying – aligned for mission results, strategy, and work plans. Simplify meetings, memos, newsletters, and other communication devices to make it easy for everyone to do the right thing. Keep expanding your community to go beyond members: other organizations and individuals may offer fresh opportunities for growth and development.

Associations are valuable systems of relationship and progress in our society. Their management is too important to be left to chance. Good Association management is a body of practices that improves over time. It is worth the effort and investment to operate soundly as you bring increased value to Members, Board, and Staff.