



a m c e s

Association Management, Consulting & Evaluation Services

*Helping associations exceed member expectations.*

## Are Your Leadership Efforts Focused?

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Volunteers and staff are constantly seeking ways to improve their association. This is especially true for newly elected chief volunteers or recently appointed chief staff officers who are anxious to make their mark on the association. If these key association leaders fail to focus their efforts on the real needs of the association or the work of others, major challenges can occur.

There are usually three different leadership teams in play in an association at any given time, a volunteer team, a staff team, and a volunteer and staff leadership team. The roles and responsibilities assigned to these teams and individual association capacity usually dictates the activities for each. One thing is certain - the activities of all teams must be congruent.

If leadership efforts are not focused, the association may experience confusion and uncertainty, resulting in resource allocation and performance challenges. This type of scenario leads to intense frustration on the part of staff, volunteers and members. Is this unique? Not at all. This situation exists in many associations and the level of concern varies from time to time based on the quality of staff and volunteer leadership. Volunteers and staff who have the required competencies through training or experience understand the need to ensure all leadership efforts are focused and work hard at doing so.

It is not unusual for an association experiencing some of the above symptoms to believe that changing volunteers or staff will solve their problems. I am often baffled as to why staff and volunteer leaders fail to invest in training for themselves to help them fulfill their leadership obligations. Training can often solve these types of problems. Many boards deal with confusion and uncertainty by putting a new or first time strategic and business plan in place. Often times they rush into planning and start setting strategies/solutions before they have truly explored the current situation.

Time spent exploring the current situation through an assessment of policies, plans, structure, practices, products and services to the best practices used by others is key – it will help the association get closer to the root cause of many challenges and define real opportunities.

A good leader or team will take the time to determine the association's current situation and areas requiring improvements. What do we know for sure? This is a critical question.

Understanding the gap between where you are and where your heading becomes clearer with a good assessment of the current situation.

Pursuing new strategies may be premature if you don't have critical pieces of information, or, if you have made some incorrect assumptions about the current situation. If you believe leadership efforts need to be focused in your association, then you may want to consider undertaking an association assessment. The assessment benchmarks your association planning, structure, policies, practices, and products and services to those used by high performance associations.

Assessments are not always doom and gloom. They often identify successful activity, explore challenges, set direction, determine expectations and clarify areas needing improvement. Depending on who is doing the assessment, you may also benefit with some helpful advice that will make life easier for many in the association and improve services to the membership.

### **When should an assessment be done?**

The best time to conduct an assessment is prior to a strategic planning session. The assessment will help draw a clearer picture of your strengths and weaknesses. Planning is not the only reason why you would conduct an assessment. A member survey may indicate a need to have an assessment take place, or it may be appropriate prior to the search for a new chief staff officer or within months of a new hire. In the case of a new chief staff officer, the assessment information can help establish expectations and serve as a benchmark for future performance measurement activity.

Assessments in associations are not new. A few organizations have completed full organizational projects while many others will often look at a specific segment or segments on a regular basis. No matter which approach is taken, improvements usually result. It should be noted that caution is needed when dealing with specific segments to ensure all interrelated components are considered. Otherwise you may end up with a screwdriver with no handle or a communication and marketing plan without the proper technology support.

There is much evidence that suggests association assessments create a momentum for change and engender a spirit of renewal for an association. The information developed sets the stage for some strategic thinking prior to engaging in the development of a strategic plan.

Of late, there appears to be an increased level of interest in assessment and strategic focus. This has been largely brought about by association managers who are trying to implement a strategic management model for their association and engage in benchmarking of best practices on a regular basis.

Students in the Certified Association Executive educational program are developing or have developed knowledge and skills to help align focus and engage in assessment. Assessment tools are often being used to seek improvements or develop new products and services. Searching the

Internet will reveal the existence of many assessment tools. Many of the tools are complex, too basic or very segment based but still provide value. Over the years I have been building on the best and developed an assessment tool. The tool is called "Association Best Practices Evaluation" and currently is in a draft form. The structure of the tool is based on the CSAE Association Management Competency Standards.

This assessment tool, or any other assessment tool, can be used by an internal or external (outside of the association) individual or team. I have seen staff, board, and key committees use the same tool and come up with different understandings and perspectives. Identifying differences along with quality discussion and communications will play a key role in keeping the association's leadership focused.

Prior to offering the Association Best Practices Evaluation tool to CSAE for general member use I am looking for some reviewers/contributors to help build on the work completed to date. If your interested send me an email and I will put you down as an official reviewer/contributor and send you a copy of the draft.

*This column features innovation and practical solutions applied to challenges, trends, issue and opportunities for the association community. Column editor Jim Pealow, MBA, CMA, CAE is a consultant and the Association Management Education Program Lead Instructor/Coach for CSAE. He can be reached at [jim@amces.com](mailto:jim@amces.com).*