



Association Management, Consulting & Evaluation Services

Helping associations exceed member expectations.

Measuring the Quality of Association Management

If asked about the quality of their organization's association management, it is highly probable that the board, members, staff, and the Chief Staff Officer (CSO) would each respond in a different manner. This is due to the fact that each holds a different level of understanding of association management. Exposure to, and participation in association management activities varies among those who have a key stake in their associations. As a result, stakeholders use different elements to measure quality. To get a more accurate reading, a list of common elements and measures should be understood and employed.

The use of organizational evaluation is on the rise as associations are settling into or establishing a continuous improvement culture. Associations committed to becoming high performance see periodic organizational evaluation as a must.

Using common elements and measures such as standards, guidelines or best practices, an organizational evaluation looks at strengths and weaknesses and identifies opportunities for improvement. Evaluation findings can also be used to reward and recognize achievement and enhance performance evaluations.

Accreditation programs are often used to support organizational evaluation to ensure standards are met. There is no formal Canadian voluntary or mandatory accreditation program for associations. Nor is there an ISO 9000 series of quality assurance and quality management standards approved specifically for associations. While ISO is geared to organizations that use standards for competitive advantage, it is possible to apply standards to an association. During discussion with an association CSO involved in an ISO exercise, it was agreed that something less complex might be more applicable given the size and resources of an average association.

Some government programs, funders, and current and potential association members have formal and/or informal expectations in place that helps them determine whether or not to fund or support an organization. Meeting or exceeding standards or practices can demonstrate your association's potential to meet key stakeholder expectations.

And while there are no formally approved standards or accreditation programs in place for associations, there are evaluation tools that can be used to assist with an organizational evaluation to determine the current status of an association and identify areas for improvement.

A number of evaluation tools are available on the Internet. Some are specific to functional areas, types of associations, while others are quite general in nature.

Association Management Evaluation Tool

At this time, an Association Management Evaluation Tool is being examined by the Canadian Society of Association Executives. This tool is based on association management competencies and covers essential elements for an organizational evaluation. It has been developed for educational and evaluation purposes. The practices listed in the tool cover core areas and will support additional probing - the CSO or a team can use it for a full or partial organizational evaluation and as a self-evaluation tool. It can also be used by an independent expert to provide an objective report.

This tool can be a remedy for many associations' challenges. The evaluation looks at how the association is performing in relation to established standards, guidelines and known best practices. The tool has developed over the last six years with input from members of the association community.

The Organizational Evaluation Decision and Impact

Organizational evaluations are often requested by boards. Boards have various reasons to undertake an organizational evaluation. They may include:

- Wanting to know where they stand and what must be done to support plans.
- Looking to make significant changes to get different results based on current and future changes in their external and internal environments.
- Supporting the CSO recruitment process and performance evaluation.
- Responding to a request from the CSO.
- Demonstrating accountability to members.

Sharing findings with members will strengthen accountability – it may also substantiate the need for dues or fee increases, or program and service changes.

Board members want their association to be “best in class”. They want to make significant and valuable contributions to their association – they want to leave their mark. Board members will want to take action if their association is not functioning the way it should be or achieving its strategic purpose. An organizational evaluation is one way to determine what needs to be done. It also provides focus.

Some CSOs are reluctant to recommend organizational evaluations. They know the process will require considerable time and resources. But, an evaluation can identify issues that have not been addressed over time due to limited resources. When potential improvements are brought to the attention of the board, it puts the board in the position of having to address them. The board will then do one of two things: prioritize the issues based on available resources (and deal with the issue of lack of resources if needed); or, nothing. If it opts to do nothing, it formally accepts the fact that some areas of association operation will not be up to potential or desired

standards. This clearly identifies the matter as a resource issue, not a staff competence or performance issue.

When a “fire is burning” and desired outcomes are not being achieved, a partial evaluation can occur. While this is better than doing nothing, one fire may cause resources to shift and result in a fire starting elsewhere. It is therefore preferable to conduct a full organizational evaluation if resources permit.

CSOs and association managers have often suggested, “They would never get us the funds we need to improve all the things we need to”. We all know the old expression that relates to making assumptions. I’ve watched CSOs evolve into penny-pinchers simply because they don’t believe their board would provide funds for organizational improvements. Yet, I’ve watched boards take decisive action when it is made aware of a problem and the potential for improvements. The message is: don’t “assume” the board’s position.

High performance association CSOs employ evaluation to determine where resources need to be focused and where improvements can be made. A new CSO may also use the organizational evaluation to establish a base line to measure progress and a basis for rewards. More importantly, CSOs can use the process as an educational opportunity – they may benefit from benchmarking progress, and at the same time learn better practices and find tools that support them. One CSO viewed the evaluation process as less of an audit and more like having a consultant/coach mentor the organization.

The Evaluation

A good first step is for the CSO to undertake a self-evaluation. The next step is to have functional and/or process teams complete the self-evaluation. The self-evaluation can be enlightening, but one cannot be too forgiving or too critical. A final step is to get an independent perspective. This can be achieved by a review of one or more individuals with expertise in association leadership and management to complete a review.

An independent evaluation can dig into areas that have been ignored and may continue to be ignored as part of a self-evaluation. An external look is more objective. Messages about challenges and improvements from an independent do not seem as threatening as when they come from another staff member or senior volunteer.

It is a big step to engage in an organizational evaluation. Communications and purpose need to be clear as the process can be disruptive and emotional. Staff feeling overworked or feeling picked on may start to polish their resumes if they do not fully understand that a continuous improvement process looking for best practices will support the strategic and business plan. The organizational evaluation, where possible, should use a process that engages and supports all staff and key volunteers. Participants must view themselves as having ownership of the process.

When the evaluation is complete, opportunities for improvement are identified. It is important to have some guidance on how to deal with the improvements. A spreadsheet can be used for accountability, follow-up, planning work, and performance evaluation.

It should be noted that it is possible to conduct a full organizational evaluation or an evaluation in a few selected areas based on specific challenges. But keep in mind that some areas of association operation are integrated and, as a result, must be evaluated at the same time.

Can We Do Better?

Students in the last course in the Certified Association Executive educational program are asked how they identify what areas require improvement in their association. They are also asked on what basis they prioritize areas for improvement. During the course they review improvement tools, engage in related discussions, and complete a significant assignment that involves evaluation and improvements.

Upon completing their assignments, students realize that an evaluation process can:

- create a better understanding of basic association purposes and objectives;
- provide useful information for planning, help set priorities and identify required quality improvements;
- establish a method to compare the association's performance;
- provide insight into non-productive areas and provide impetus for change;
- indicate areas of success and provide a chance to celebrate and reward efforts; and
- help identify the root cause of problems, rather than just the symptoms.

The students also indicate that:

- A good time to engage in an organizational evaluation is prior to development of strategic or tactical plans. Other times may relate to changes in senior staff leadership so the board fully understands the situation and the competencies required.
- Evaluation can be valuable. Some people need a push to identify improvement priorities.
- Documentation about existing activities makes the evaluation easier.
- Being exposed to more effective practices results in savings in time and money and improves focus for the organization. It also provides other options for improvements.
- An investment in evaluation is necessary because it relates to the future of the organization and improvements that are needed.
- Involving staff as teams regarding a program or service evaluation is valuable as it involves them in the analysis, solutions' development and implementation. This, in turn, increases ownership and understanding.
- The evaluation has a cost, but it is small compared to the benefits of making improvement and/or new starting new initiatives.

If you want to benefit from the results provided by an organizational evaluation and move closer to becoming a high performance association, I suggest you explore an evaluation strategy for your association.

This column features innovation and practical solutions applied to trends, issues, challenges and opportunities for the association community. Column editor Jim Pealow, MBA, CMA, CAE is a consultant <http://www.amces.com/> and the CAE Education Program Lead Instructor/Coach for CSAE. He can be reached at jim@amces.com.