



## Association Management, Consulting & Evaluation Services

*Helping associations exceed member expectations.*

### The Learning Link

**How strong is the link between your association's strategic direction and human resource management activities?**

**Do you have the right competencies for your association's plans?**

One of the questions that students in the AME 300 – Association Operations 1 (Operations Support) course are asked to respond to and discuss is: What could be done to strengthen the link between strategic direction and human resource management in your association?

In reviewing responses to this question it was determined that one or two associations are at an advanced stage, and several more are in the process of making changes to strengthen the link. Most associations need to make improvements in linking strategic direction and human resource management.

### Approaches to the Relationship

There appear to be three approaches to handling human resource management in relation to an association's strategic direction. They are:

**Prime Issue** – It is a current or hot issue and not necessarily connected with a strategic direction process and related discussions.

**Tag-on** – A strategic plan is in place along with a budget/business plan with limited details. The question raised is how can we accomplish things with the staff and volunteers available.

**Blended** – Human resource management issues and performance expectations are considered in strategic and business plans.

Associations that do not engage in a formal planning process tend to deal with human resource management issues only when a problem or situation has occurred or is in the process of occurring. Associations that occasionally engage in strategic planning every three or five years tend to apply the tag-on approach and can apply the prime issue approach in between. Associations that are fairly sophisticated in their planning efforts and apply a strategic management model (integrated approach to strategy formulation, implementation and evaluation) are usually engaged in proactive activity and blend human resource management issues into their strategic and business plans. In fact, a human resource plan would likely be

found along with marketing and communications plans as an attachment to the business plan. The chances of using the prime issue approach are lower for this group of associations.

### **Planning Activity and Possible Approach**

- No Strategic Direction Plans
- Occasional Planning
- Strategic Management Model
- Prime Issue Approach
- Tag-on Approach
- Blended Approach

Improvements identified to strengthen the link between strategic direction and human resource management require asking key human resource questions such as:

Based on the strategic plan and what needs to be done what competencies (knowledge, skills, attitude) are required?

Based on our staff evaluations, do we have the competencies required or do we need to upgrade, acquire or learn?

Do we have the right number of volunteers doing the right things?

When association managers refer to human resources they often focus solely on staff and do not include volunteers in this category. Volunteers are a critical human resource employed in strategic direction activities. Perhaps association managers make assumptions about volunteers, such as there are many of them and they are all equal. Yet formal volunteer management planning is often elusive in associations. Without proper determination of needs and matching, the risk of obtaining the wrong individuals increases.

Another dangerous assumption made by Boards is that the staff can do the work outlined in the plan. Perhaps they can, but what other work will be put aside or not completed in order to take on these responsibilities? Perhaps they will do the work, but may perform the work only at a level where they feel comfortable, as they would like to have greater knowledge and skills in the area.

Earlier reference was made to a human resource plan. The plan could be one or several pages and should consider staff and volunteer requirements to accomplish strategy based on required competencies. A formal staff evaluation process is critical in order to determine the current competencies available and those that need to be developed. A formal policy and process for staff evaluations should be in place and the timing should be integrated with the planning process.

### **Association Cycles**

The cycle of an association's activities will also have an impact on the competencies required to support planning activities. For example, an association going into a growth situation will have different requirements than associations in a turnaround or maintenance situation. The growth situation will require strong marketing, development and communication competencies whereas the turnaround situation will require more financial competencies to deal with new revenue and cost cutting issues.

## **Association Managers and Competencies**

National Association Management Competency Standards have been developed for association managers by CSAE. These standards are used to assist with recruiting, staff evaluations and self-evaluation purposes to identify continuing education requirements.

How do you measure up and what areas do you need to improve based on your association's plans and cycle?

Association managers will need to shift competency applications depending on the association's cycle and strategies set by the association. If the association manager can not shift (for example, from developer competencies to maintainer competencies) he or she will need to move on or possibly face being relieved of their duties. As competencies shift for staff this also applies to volunteers. Recruitment and rewarding of volunteers should be linked to the application of competencies.

A human resource plan linked to strategy is critical as it will ensure the required competencies and individuals are in place to turn a strategy into a reality. It will also help association managers realize what shifting competencies they will have to use, upgrade or develop. Asking key questions about human resources and strategy will strengthen that important link.

*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).*