



I.D.E.A.S.

VOLUME ONE

**Innovation, Developments, Examples, Advances,
Standards in Association Governance
and Management**

By Octavio “Bobby” Peralta

Prologue

Dear Reader,

I have written this compendium of original and sourced articles and blogs, with one thing in mind – to share with everyone interested, my experience and knowledge on association governance and management accumulated over 27 years of working in and building up associations.

From my perspective, association leaders are not literally born. They are moulded out of passion to learn and to succeed in the profession they have chosen to pursue or have been given “by chance”. I know this fully well because of what I have been through. I was a mechanical engineer by education, a development banker by training, and then an association executive “by fate.” I consider myself truly blessed by this career and life transformation.

This wonderful journey was never by my lonesome. I share this with many people and institutions who are close to me, who I have met, and with whom I’ve worked. There’s my supportive family to whom at first I had difficulty explaining my job as an ‘association man’. Then there’s the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP) which provided me the ‘hands-on’ experience of managing an association, and the American Society of Association Executives which gave me the ‘toolkit’ to do it well. And there’s the Philippine Council of Associations and Association Executives (PCAAE) which I co-founded as a way of “giving back” to a profession I dearly love. PCAAE exists because of the backing of the Philippine Tourism Promotions Board, the Philippine International Convention Center, the Center for International Private Enterprise, and ADFIAP.

This publication would not have been made possible without the support of the PCAAE Board of Trustees and Secretariat, the Philippine Business Mirror, a news daily where I write a weekly column, thanks to its chief editors, Chay Fernandez and Jun Vallecera, Writers Edge’s Sheila Samonte-Pesayco who edits my articles, and AssociationSuccess.org’s Arianna Rehak, Lucie Robathan, and team for the editing, design and layout of this publication. I thank them all.

I hope you find value in reading the contents of this curated work. I would be more than pleased if you have picked up an idea or two from this piece and can use them for your work and for your association’s success.

My best,

Octavio ‘Bobby’ Peralta

Foreward

I was lucky enough to come across Octavio “Bobby” Peralta’s wonderful mind through his blog, and after reaching out to him about the possibility of publishing his thoughts, now enjoy an extremely rewarding collaborative relationship with the Philippines’ own Association Man.

Bobby is a constant source of insight, passion, and energy. His prolific thought leadership has changed the landscape of the association industry in Asia, and his ingenuity continues to inspire me, and our own efforts at AssociationSuccess.org.

His journey through the association space offers valuable information and sage stories both for people and communities new to the industry, and for established executives looking to inject their work with a fresh and deeply engaged perspective.

It has been a joy to collaborate on the creation of this book. We hope that it can serve as a trusted handbook for association professionals on any rung of their career ladder.

Arianna Rehak
Director of AssociationSuccess.org

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Chapter 1: About Associations

What is an association?

Quite often in my “elevator pitches” of promoting and enlisting support for the advocacy of the “association of associations” that I lead and founded, the Philippine Council of Associations and Association Executives (PCAAE), I usually get a reply from a prospective member or supporter that his or her organization is not an association per se. This triggers a bit of discussion about what an association really is.

There are many definitions of an association. The best I could find is that of the American Society of Association Executives (ASAE), of which I am a member, which defines an association “as an organization or group of individuals affiliated with one another, who share a common purpose, interest, or mission, and exist for the mutual enrichment and advancement of their membership.” This definition augurs well with the Latin word *associare*, which means “to unite or ally,” or the mid-16th century Latin word *associatio* which means “uniting in a common purpose.”

Armed with this knowledge of the etymology of the word “association,” I now have an explanation when asked whether his or her organization, which may be a chamber of commerce and industry, a professional society, a membership club, a cooperative, a federation, a nongovernment organization, or a non-profit organization, can be a member or supporter of the PCAA. Here are the common explanations:

“It is not the word, “association”, appended to your organizational name that determines whether it is an association or not. For as long as your organization has members whom you provide services [education, research, networking, etc.], advocate for their cause, or simply have common interests, then you are considered as an ‘association’ in the general sense of the word. It is also the conventional term that membership-serving organizations around the world use.”

In North America you have the ASAE and the Canadian Society of Association Executives. In Europe you have the European Society of Association Executives. In Africa, the African Society of Association Executives. In our region you have the Asia-Pacific Federation of Association Organizations whose members are PCAA, the Korean Society of Association Executives, the Associations Forum (Australia) and the Australasian Society of Association Executives (Australia and New Zealand). Recently, the Malaysian Society of Association Executives was launched. Note that all these organizations have the word “association” attached to their names despite having varied members which I have enumerated above – chambers, societies, and even charitable/philanthropic organizations and foundations.

The word “association” is a generic term for individuals (like professional societies – doctors, nurses, engineers, lawyers, accountants, credit/financial analysts, real estate/stock brokers, etc.) or institutions (trade, chamber of commerce and industry, foundations, advocacy groups, etc.) and “hybrids” (with both individual and institutional members) “uniting together for a common purpose.”

I believe all these associations have common issues, challenges, solutions and opportunities, and this is what the PCAAE aims to achieve: to unite associations so they can learn together, work together, grow together, celebrate together and be stronger together.

Why associations matter

According to the American Society of Association Executives (ASAE), below are three key influences why associations matter. In each, I cited an example of programs that members of the Philippine Council of Associations and Association Executives (PCAAE) have undertaken in their respective organizations:

- Associations enrich lives through meaningful volunteerism, creating standards of safety and quality, promoting specialized expertise and creating citizenship with communities around the globe. On standards of safety, the Cement Manufacturers Association of the Philippines has a road-safety program that standardizes road-safety guidelines among all its member-companies' trucking contractors.
- Associations sustain competitiveness by committing resources to lifelong learning, professional development, mentoring and research. The Philippine Franchise Association offers the Certified Franchise Executive Program, which enables franchise professionals to earn, grow professionally and reach a recognized standard of excellence in the franchise community.
- Associations impact the economy via industrial development, product and service innovation and facilitating domestic and international business. The Philippine Chamber of Commerce and Industry's Industry Sector, for example, spearheaded the crafting of the Transformation Development Program that articulated the steps and specific strategies that will help achieve the country's vision as an industrialized tiger economy.

ASAE President and CEO John H. Graham IV, in the latest issue of PCAAE's *Association World* magazine, said: "Associations put their resources to work in solving many of the world's pressing problems [like calamities]...they were in the front lines of relief efforts, organizing and deploying professionals from their field to assist in the affected communities or raising funds to meet immediate and long-term recovery needs." I think this resonates well in the Philippine context where associations got together, for instance, to help victims of super typhoon Yolanda.

ASAE Foundation President Susan Robertson, in her presentation at the recent Dubai Association Conference, said: "Everything we touch and do is influenced by an association.

Associations make the world smarter, safer and better – they provide, among others, post college skills education and standards of excellence and serve underserved sectors of society."

At the PCAAE Associations Summit 5 in the PICC in November 2017, our closing

keynote speaker, Roy Sobrecarey, president of the New Rural Bank of Agoncillo, said associations are, in every step of the way in our lives – from “womb to tomb,” so to speak – the attending nurse and doctor at birth are members of a professional society, the teachers and professors at schooling, one’s self during his or her career and, finally, even the mortician. “This is a continuing life cycle, sustaining the viability of many associations that have an impact on a whole range of human activities,” Roy added.

“The future of associations is very bright.... No matter what the world looks like in the future, people will have common interests and challenges to meet,” John summed up.

Associations’ purpose and mission

In my talks with associations, principally with members of the Philippine Council of Associations and Association Executives (PCAA), I always take the opportunity to challenge the audience by posing the question: “Can you state your association’s purpose in 10 words or less?” Then I add this scary message: “If not, you are in deep trouble!”

Usually, the first reactions I get are blank stares and perplexed looks. How can a simple question seem suddenly difficult to answer? I think part of the reason lies in the basic misunderstanding between purpose and mission. Most associations are used to knowing and stating their mission, which basically describes what they do as an organization. There is, of course, no problem with that.

However, purpose has a deeper meaning and impact than mission; it strikes at the very core of an association and answers these basic questions: “Why do you do what you do?”, “Why do you exist?” and “Why do you serve your cause?” So purpose essentially is the beacon that guides you and answers the question “Why?”

In contrast, mission answers the question “What?” – “What do you do to accomplish your purpose?”, “What difference do you make?” and “What significant change will happen if you fulfil your mission?” Mission, therefore, is doing what really matters in achieving your purpose and, thus, the wheel that steers you to achieve your goal.

The other reason for not focusing so much on the association’s purpose is that a member, in most cases, looks only at the tangible benefits of membership (the WIIFM—What’s in it for me?), e.g., getting information and knowledge through seminars and publications, networking with peers for business enhancement, bragging rights by belonging to a prestigious and exclusive society, club or trade association, etc.

In the 2015 membership marketing benchmark report of the American Society of Association Executives, third on the list of reasons people join associations is advocacy (first is networking and second is access to current/specialized information). In advocating for a cause, the first imperative is to know the association’s purpose. Again, many members miss out on this.

The fundamental argument why members and leaders of associations must know by heart its crystal-clear purpose is for strategy and direction’s sake. If you do not know your purpose or reason for being, then you will not know what to do and where to go. I think this

is as basic as it can get.

In the case of PCAAE, since our members are both associations and association executives, it is paramount for us to address both their needs and aspirations. So, our “not-exactly–10-word” but short and easy to remember purpose, is “to advance the association management profession and to make associations well-governed and sustainable.” May I now ask you, “What’s your 10-word or less purpose?”

What is an association’s business, really?

As I was preparing for a talk on association management and governance for members of the Philippine Council of Associations and Associations Executives and was mulling over what theme to cover, an idea suddenly struck me. What if I discuss what really is the “business” of an association? Is an association in the “business of being an association” or is it in the “business of associating”? This certainly got me thinking deeper. Having been an association executive for over 25 years (and counting), I thought: “Gee, it’s going to be tough to decipher the difference between the two!”

As I was going through this, it dawned upon me that what seems to be like a play of words, these two phrases, actually mean different things if you come to think about it.

To be honest, I see the first (the business of being an association) as static and pretty standard and, matter-of-factly, it connotes a limited viewpoint of what an association must and can do. It also means being process-oriented, procedural and simply “coasting along”. It’s traditional and so 20th-century thinking.

On the other hand, I find the business of associating more dynamic, innovative and member-centric. To my mind, this is what an association should really focus its energies and resources on. “Associating” means “to unite, to join together as colleagues, and to keep company as a friend or an ally”. This description fits the true essence of an association.

As mentioned at the beginning of the chapter, an association is defined by the American Society of Association Executives as “an organization or group of individuals affiliated with one another who share a common purpose, interest, or mission and exist for the mutual enrichment and advancement of their membership”. Again, this definition strikes at the very heart of what an association is all about.

I have to emphasize the importance of this association business distinction because it involves a change of mind-set. It sets a guide for strategic direction, and is a fresh way of looking at how an association should work to fulfil its purpose and be of service to its members.

I can now confidently say to our members that an association is, in its truest sense, in the business of associating. This critical point of view poses a challenge and, at the same time, provides a great opportunity for associations to rethink, retool and readapt to the current ever-changing business environment that we all in the association community are facing on a daily basis.

The business model of associations

People are, by nature, sociable, and wish to associate with others who have common interests and aspirations. This sense of belonging and of community is what drives an individual's motivation to seek a "place to be in," and why many associations worldwide thrive.

From an association executive's standpoint, it is important to know these dynamics and how they affect association membership. To grow and prosper in today's tough environment, an association needs to have a solid business model, one which has these three key elements: (a) a unique value proposition, (b) a sound profit model, and (c) an efficient and effective execution model.

An association's unique value proposition answers the question: "What compelling reason exists for people or institutions to join and pay membership dues, a primary revenue source for an association?" In the case of my organization, the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP), our value proposition is to highlight that it is the only regional network for development banks, backed with 40 years of experience and expertise, and with a membership coverage in 40 countries and territories. In detail, ADFIAP provides the development banking community with:

1. professional affiliation, status and recognition;
2. access to continuing education and professional development programs not available elsewhere;
3. access to practical operational tools, standards and knowledge resources;
4. a platform for business cooperation and networking; and
5. a venue for advocacy on sustainable development.

An association's "profit" model may be a misnomer because, generally, associations are classified as non-profit organizations. Perhaps, a "revenue surplus" model may be a more appropriate term. But whether it is termed profit, revenue surplus, or whatever, the fact remains that like any other organization, an association has to have ample financial resources to continue providing services to its members, as well as to have a reserve fund for challenging times.

In this regard, an association needs to answer the question: "How does the association manage to charge higher for its offering than what it costs to offer it?" In ADFIAP's experience, there is a need to balance and diversify revenue sources. Annual membership dues are like taxes; raising it is always a contentious issue among members. So the strategy is to be less dependent on membership dues and seek other sources – in our case, conference and seminar fees, consulting fees, publication sale, grants and sponsorships.

On the execution model, an association has to respond to the question: "How will the association make prospective members find out that it exists, what it offers and how to convince members to become customers?" It also has to deal with the question: "How will it

organize itself to meet customers' demand effectively and efficiently?"

In ADFIAP, branding and visibility are core components in its execution model. For branding, ADFIAP works hard to appeal to its members' aspirational and emotional needs. For aspirational appeal, ADFIAP positions itself as the premier development banking network in the Asia-Pacific region so members stay for prestige. In terms of emotional appeal, it sets the association as a "community" of development bankers advocating for the financing of sustainable development.

ADFIAP also tries to be visible in many high-profile events internationally, promoting its work and advocacies, and engaging with its networks, such as the United Nations bodies, the Apec process, and other bilateral and multilateral development organizations. Being in the guest list of these institutions' events provides ADFIAP a venue for being known and visible.

In communicating its services and advocacies, ADFIAP employs many different channels: from face-to-face presentations, published articles and toolkits, web-based resources, and nine microsites apart from its main web site. Doing good is one thing; another important aspect is communicating it.

The ADFIAP structure is also lean, with eight permanent staff. It uses time-bound, project-based support, and a lot of assistance from its members. It also maximizes the benefits of partnerships and alliances, as well as maintains its institutional integrity and credibility through good governance and professional management.

Emulating remarkable associations

There are three commitments and seven measures of successful associations. This is based on the bestselling classic, *7 Measures of Success: What Remarkable Associations Do that Others Don't*, published by the Washington, D.C.-based American Society of Association Executives (ASAE), to which I am a long-standing member and a content task force member of its annual Asia-Pacific Great Ideas in Association Management Conference.

Jim Collins, author of *Good to Great* and *Built to Last*, wrote: "Associations are the hidden glue of our society and economy." Based on this premise, *7 Measures* puts together four years of intensive original research and a 15-year analysis of data, and concludes with these commitments and measures:

Commitment to purpose

- A customer-service culture – An approach that says "we are here to serve you" is built into the organizational structure and processes.
- Alignment of products and services with mission – Offerings are consistent with the organization's mission, which remains central and unchanging even in the midst of changes in the external environment.

Commitment to analysis and feedback

- Data-driven strategies – The organization not only gathers and analyzes information, but also has effective processes for taking action based on what it has learned.
- Dialogue and engagement – An internal conversation continually occurs among staff, board and members about the association’s direction and priorities.
- The CEO as broker of ideas – The chief association executive facilitates visionary thinking throughout the organization.

Commitment to Action

- Organizational adaptability – Remarkable associations learn from and respond to change. Although willing to change, they also know what not to change.
- Alliance building – Associations that are secure and confident in their own right seek partners and projects that complement their purpose and mission.

In my very first column, “Confessions from an Association Man – Part One” published on July 6, 2016, I told the story on how clueless I was 25 years ago when I accidentally entered the association executive profession coming from an engineering background and a budding development banking career. As things turned out at the time, my first instinct was to join ASAE as a member, which then opened my heart and mind into the world of association governance and management.

Today, I consider myself as an experienced association executive. However, I’m still learning, and I have been faithfully following to the letter the findings of these 7 *Measures*, which, I would like to believe, made good results for me and my association. I hope these measures will help you, too, in making your association successful and sustainable!

Association success factors

As a member of the American Society of Association Executives (ASAE) and a volunteer member of its Asia-Pacific Content Task Force, I was invited to attend and speak at the ASAE Great Ideas Global Association Management Conference Asia-Pacific held in 2017 in Seoul, South Korea.

The conference was a unique opportunity to connect with other association executives from the region, the US, and Europe on best practices in association governance and management. There were 17 learning plenaries and simultaneous sessions and 32 speakers and moderators. One of the sessions I attended was on the “5 pillars of association success” presented by Nikki Walker, vice president for the global association management and consulting services of the Geneva-based MCI Group. I wish to share with you what Nikki mentioned as the five key success factors for associations:

- **Value** – An association’s value proposition to its members is a critical factor to its relevance and sustainability. It needs to be able to answer the members’ perennial

question of “What’s in it for me?” Aside from this, the association’s value must be needs-driven and must translate into a member’s return on investment.

- **Content** – More and more, members join because of an association’s unique and robust body of knowledge of the field or industry it represents. This includes publications and journals, web site and other online resources, such as e-community for knowledge exchange. Associations, however, need to be an “able curator” of worthwhile content, in contrast to being simply a “content disseminator” of what is available elsewhere.
- **Products and Services** – Typically for associations, this covers education and continuing professional-development programs, conferences, certification and qualification standards, accreditation, online courses and other knowledge exchanges. The key factors here are uniqueness, practicability and reliability of the offerings.
- **Influence** – This connotes advocacy work and dialogue with government. Among others, this also includes promoting the profession or industry through creation of codes, guidelines, standards and best practices. Having a strong leadership role and a spotless credibility bring about a good image and status in the community.
- **Collaboration** – This involves partnerships and alliances on sharing experiences, co-creation of programs, on and offline working groups, discussion forums, special interest groups, etc. Cooperation among associations and other organizations have been key to many successful programs and activities of late.

Nikki purposely left out membership in the list of success factors as this, she said, is already a “given”. After all, membership is the “lifeblood of an association”. By providing these components to your association members is to be successful and sustainable going forward.

Formula for success

I was in Dubai in December 2017 as one of the invited international panelists of the 1st Dubai Association Conference organized by the Dubai Association Centre (DAC), a government-initiated entity established by the Dubai Chamber of Commerce & Industry, the Dubai Business Events (part of the Department for Tourism and Commerce Marketing), and the Dubai World Trade Centre (DWTC).

The conference, held at the DWTC, drew over 300 attendees from around the world. It served as a platform for dialogue and education for associations interested in exploring opportunities in the Middle East and contributing to building an association community that drives the knowledge economy in the United Arab Emirates. Themed “Building a Community: Dubai 360°,” the program was developed to see Dubai in its entirety – from business to culture to heritage and entertainment – and to bond with other associations, both local and international, as well as with academia, tourism and government agencies.

I was in a panel of fellow CEOs representing “associations of associations” globally –

the African Society of Association Executives (based in South Africa), the European Society of Association Executives (Brussels) and the American Society of Association Executives (Washington, D.C.), all CEOs of different associations in their respective countries. I represented the Philippine Council of Associations and Association Executives (PCAAE) and the Asia-Pacific Federation of Association Organizations (APFAO).

The panel topic was on sharing experiences, challenges and resources of associations of associations as they put together and engage in one platform all member-serving organizations in their jurisdictions. One of the questions asked was the resources needed to achieve success.

I contributed the following formula:

People (Good Board Governance + Effective Management + Volunteer Engagement) + Collaboration + Revenue Generation = Sustainable Association

- **People** – An association is only as good as its people resources – the board (governance), management staff (day-to-day operation) and volunteer members (committees and task forces). Able leadership on two levels – board and management –is essential to develop and implement programs and services to members. Engaged volunteer members provide additional help and resources to the organization.
- **Collaboration** – Partnerships and alliances are also resources that associations can tap to “multiply” what they are currently doing. Working together with like-minded institutions build a larger community and expand the “power of collaboration” to undertake more activities. Extending even further to creating a broader “ecosystem,” i.e., outside the association community (nonmember service users and customers, sponsors, academia and government) provide many more opportunities for associations to grow.
- **Revenue generation** – While associations are not-for-profit organizations, it does not mean that they should not have enough funds and reserves to sustain themselves during downturns and uncertainties. Diversifying revenues by not only relying on annual membership dues, as well as maintaining a reasonable surplus, are critical inputs for sustainability.

I crafted the above formula based on my experience. It is also applicable to any association wanting to grow and be sustainable. As for Dubai, I think it has found the formula to build an association community through the Dubai Association Centre, which acts as a one-stop facility to assist associations to come together in the emirate to meet, exchange knowledge and network

Community as a strategy

I am writing this at the start of a New Year. Since January is usually the time for “organizational reflection,” I’d like to share with you the principle upon which we have built our organization, the Philippine Council of Associations and Association Executives

(PCA AE). It's about using "community" as a strategy.

In the publication by the American Society of Association Executives, entitled "*Take the Pulse of Your Membership: Community as a Driver for Organizational Success*," Sara C. Wedeman, PhD, president of the US-based Behavioural Economics Consulting Group, argues that members' sense of community is the essential driver in an association's success. It is no longer enough to say that you know community when you see it. Instead, you need to know not only what it is, but also how to measure it, and how to foster it among your members.

Based on their research findings, and particularly on the work of community psychologists, the following constitute the working definition of community:

- Community is a social and emotional "glue" that provides the stickiness and connection that motivate people to help one another.
- Community is a web of social relationships, some formal and some invisible.
- Community is much more than a physical or virtual grouping based on a set of knowable attributes. It provides a foundation, a social infrastructure that brings together and supports such groups.

In this regard, the experience of community has four central elements:

1. **Membership** – a feeling of belonging or sharing one's presence or potential relatedness. Associations provide a space for people to connect around shared identity and relatedness.
2. **Influence** – a sense that one matters and that one does makes a difference. Associations enact this as voice in the form of lobbying, advertising and advocacy. Members want to know they have influence in the association, too, and that their leaders will listen to, and value what they have to say.
3. **Integration and fulfilment of needs** –a confidence that membership in the group will fulfil needs and expectations. Associations accomplish this by providing members with venues for learning, advocacy and interpersonal exchange.
4. **Shared emotional connection** – a trust on the part of members that they have shared and will share history or experiences. Although people do not typically join associations with friendship as a primary goal, the association membership saves them the trouble, and the risk of screening colleagues, assuring the member that another member is "one of us."

For PCA AE, we positioned it as an inclusive community of like-minded and same-purposed institutions and individuals, helping each other solve problems, sharing knowledge and information and building cooperation and partnerships for growth and sustainability of their associations.

For associations, community is truly a strategy. Community is present throughout your association whether you recognize it. It is there in the form of special interest groups, sections, online and offline networks, friendships and collegial relationships between

members. It is consistently true that, whether virtual or in person, ad hoc or structured, connection with an association offers a loose-but-powerful structure within which one can meet one's fundamental need for communication with, learning from and helping others. Associations that focus on one's interests and facilitate such experiences will attract members. If they do not, their members will go elsewhere.

Associations as sustainability leaders

Nowadays you often hear the word "sustainability" which, in general terms, means continuity and endurance of systems and processes. It is also interchangeably used for "sustainable development," a much broader concept. For this column, I will use sustainability in the context of business sustainability, defined as managing the "triple bottom line" – a process by which businesses manage their financial, social and environmental risks, obligations and opportunities.

In a post by Nancy Himmelfarb of GreenBiz, companies like Unilever, with the "Unilever Sustainable Living Plan," and Nike, with its "Sustainable Innovation Imperative," have long been seen as business leaders in sustainability. These companies demonstrate a clear vision and commitment to sustainability and are experts at integrating sustainability with their business goals and operations. But what about associations? As industry advocates, shouldn't they take a leadership role in advancing sustainability efforts?

Most companies need sustainability support, and associations are uniquely positioned to guide them and promote their efforts. Associations can – and should – leverage their position to improve the sustainability performance of businesses across entire industries. According to Himmelfarb, here's why associations are well suited to get the job done.

Associations understand the issues that matter most to members. By virtue of their unique role, associations possess very broad industry intelligence. My organization, the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP), has been publishing its annual sustainability report (SR) since 2008 within the framework of the Global Reporting Initiative (GRI), the *de facto* global sustainability-reporting standard.

The ADFIAP also has a sustainability officer who records and tracks our performance based on sustainability-reporting indicators. He conducts SR seminars and helps our members prepare the SR.

Associations are positioned to bring members and stakeholders together. As conveners, associations can bring together members and other stakeholders, acknowledge diverse and sometimes conflicting stakeholder interests, supply technical expertise and knowledge, and facilitate agreement on industry-wide sustainability goals and voluntary performance standards.

Facilitating the development of sustainability goals and standards with extensive industry participation and buy in is the first step to improve sustainability performance industry-wide.

Associations can drive change. After defining sustainability goals, associations should support performance improvement by issuing calls to action for members. Encourage members to adopt sustainability standards, facilitate pilot programs and collaborate on research to address sustainability challenges.

Associations should also recognize top performers by promoting success stories, best practices and lessons learned with other businesses, consumers and the public at large.

In addition, associations should talk about sustainability and what it means to the industry, communities and the world at large. These engagements can be big or small, and might include industry forums or events, as well as bite-size messages or moments, to reach all potential audiences on topics that interest them.

Associations should also consider publishing a sustainability report with disclosures on industry performance, remembering that sustainability is a journey and that the public expects transparency, not perfection.

Business has always been a source of sustainability innovation, and associations can do more to catalyse and support business efforts. Are you ready to take on the challenge?

Associations stronger together

Four years ago the Tourism Promotions Board (TPB), the Philippine International Convention Center (PICC) and my organization, the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP), had a vision: for the association community in our country to band together and create one platform, where they can learn together work together, grow together and celebrate together.

In the United States, Europe and Australasia, associations have long gotten together as they know the “power of collaboration.” We thought it was time we do the same in the Philippines.

So, on November 20, 2013, these three institutions launched the Philippine Council of Associations and Association Executives (PCAAE) to be the “association for associations” at the first Association Executives Summit held at the PICC. The 216 delegates of the summit became the founding members of PCAAE.

Today the PCAAE has over 1,000 members, supporters and service users from trade associations, chambers, professional societies, clubs, foundations, cooperatives and other member-serving organizations that cover business, medical, scientific, educational, technical, social welfare, philanthropic, agricultural, sports and other non-profit undertakings.

Aside from the Associations Summit, which is the biggest annual gathering of associations and association professionals, the PCAAE is proud to accomplish the following notable achievements over the last four years:

- The Certified Professional Association Executive credentialing program to further professionalize association governance and management. There are now 44 graduates of the program;
- The “Ang Susi” Awards (acronym for “Associations nurture National Growth thru Social Unity and Sustainability Innovations”) that recognizes and honours outstanding people and projects for their contribution to the sustainable development of the country;
- The TPB Ambassador Program to attract International events to the Philippines to boost business-events tourism in the country;
- The Asia-Pacific Federation of Association Organizations that consists of national associations of associations in Australia, Korea and the Philippines. Malaysia has recently set up MSAE. Japan, Thailand, Taiwan and Singapore are considering organizing theirs, too;
- One-of-a-kind publications, such as the Association World Magazine and e-newsletters on association governance, association management and others; and
- In the guest list of international meetings, incentive, conventions and exhibitions events around the world, as well as writing and speaking opportunities, thus enhancing visibility and credibility.

Though these advancements have been significant, there is still much more work that needs to be done. There are thousands more associations to reach out to, and there’s this dream to set up association chapters in other regions of the country.

So the theme for 2017’s Associations Summit 5 – “Stronger Together” – held on November 22 and 23 at the PICC emphasized anew the need for associations to continue to learn together work together and to dream together. For in unity, there is strength and in strength, there is power to succeed!

Legacy of associations

Nowadays in the association world, I hear a lot about building a “legacy,” especially in the context of what associations “leave behind” after organizing events in a venue destination.

In his article in *Legatus* magazine, Paul J. Voss writes that the word legacy has been used exclusively as a noun for nearly 500 years but has expanded its original meaning and now signifies a “gift” or “bequest” transmitted from one person (or one generation) to another. He adds, “used as a noun in this fashion, legacy carries a wholly positive meaning and represents an act of love, charity and care.”

In “Three Legacy Opportunities for Associations,” an article in the April 2017 issue of *Boardroom* magazine, Keith Burton and Kristen Tremeer wrote: “International professional associations that convene congresses in destinations around the world mustn’t

miss out on the opportunity to leave a legacy that reflects the values of the association, whether tangible or intangible, social, or economic or environmental.” It then offers three legacy opportunities for associations:

- **Community engagement:** Examples are planting a vegetable garden for a seniors’ center, building a playground for a preschool or constructing a library at a community center. It’s a “volun-tourism” approach that gives visitors to a destination a chance to interact with local residents they might not have otherwise been able to meet.
- **Content-driven:** Examples range from the establishment of an endowment in a relevant university department to a scholarship for participants from developing economies to attend future congresses, or using the host association’s members as congress volunteers.
- **Skills transfer:** An example is a mobile clinic in an underdeveloped facility staffed by leading physicians, who treat and train their local counterparts or special training sessions for students in a particular field.

But how about legacy “beyond events?” What legacy do associations give to society? Below are some examples of what Philippine associations and other member-serving organizations have done and are still doing. These outstanding legacy projects have been recognized by the Philippine Council of Associations and Association Executives (PCA AE) through its annual “Ang Susi” Awards:

The Cement Manufacturers’ Association of the Philippines’s “Road Safety Program” aims to standardize road-safety guidelines among all its member-companies’ trucking contractors.

The National Confederation of Cooperatives’ “Aflatoun Social and Financial Education Program” allows children from diverse socioeconomic backgrounds to manage their own savings accounts and learn about savings, spending and budgeting, among others.

The Philippine Franchise Association’s “Certified Franchise Executive (CFE) Program” offers franchise professionals the opportunity to learn, grow professionally and reach a recognized standard of excellence in the franchise community.

Alalay sa Kaunlaran Foundation’s “Agriculture Value Chain for Onion Farmers in San Jose City: Onion and Vegetable Producers Cooperative” helps onion farmers to have a sustainable agricultural livelihood and uplift their socioeconomic condition by adding value to their produce with stable pricing and market availability.

These legacy projects demonstrate that associations not only provide services to members but also benefits to a wider community and, in effect, contribute to the socioeconomic development of the country.

3 key development roles of trade associations

Trade associations, also known as industry trade groups, business

associations or sector associations, are organizations founded and funded by businesses that operate in a specific industry. Trade associations offer their members services, such as organizing conferences and networking events, as well as offering educational programs and publications. But more than services, trade associations have developmental roles to fulfil for the benefit of society.

Based on my experience with the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP), these overarching developmental roles of trade associations include the following:

- **Professional development role** (developing the individual) – In our case, this role refers to training and building the capacity of development bankers for them to be able to identify national priority and strategic projects, evaluate them adequately and ultimately provide funding. Our association, through a separate training business unit, designs and delivers professional learning courses, including a certification or credentialing program to professionalize the industry. Developing the human capital is, thus, an important part of our role as an association.

- **Business development role** (developing the institution) – After the individual, the next level of our development role is the institution. While an institution is made up of individuals, it is equally important to develop the organization cohesively through knowledge and best practice sharing and advisory services. We do this institutional capacity building under a separate consulting and advisory business unit. Developing the institution results to enhancing its sustainability and contributes to increasing its financial capital, thus, its organizational continuity.

- **Sustainable development role** (developing the nation) – As an association of development finance institutions, our main work and advocacy centers on the four pillars of sustainable development, i.e., economic, social, environmental and governance. In terms of economic, our association's thrust is developing and financing micro, small and medium enterprises deemed to be the backbone of the economy. For the social aspect, our focus is on financial inclusion, including microfinance. On environment, our concentration is on the promotion of green-banking initiatives, while on governance, the centerpiece is both on advocating for good corporate and public governance policies and practices in development banks. All these efforts are lodged in our responsible citizenship unit that provides information, capacity-building and best-of-industry practice exchange.

With these three key developmental roles, trade associations can make a difference in society by developing the individual, the institution, and the country through capacity-building, partnerships and advocacy initiatives.

Why associations fail

Above, in “Emulating Remarkable Associations”, I wrote about the results of a multiyear study of the American Society of Association Executives (ASAE) on the “7 Measures of Success: What Remarkable Associations Do That Others Don't.” This time, I wish to share an article by Virtual, a leading technology-focused association-management company based in the US. Interestingly, both these publications say that an association

needs to avoid the following pitfalls to succeed:

Losing focus on your purpose. Focusing on the association's purpose is crucial to defining its brand and formulating actions to accomplish its work and advocacy. Doing the contrary could spell doom for the organization.

Straying into the wrong business. The key to success is simple: Do one thing, and do it better than the competition. Straying into areas in which the association has no expertise could be disastrous.

Failing to communicate benefits. Associations must communicate their benefits on an ongoing basis so that their members feel connected to the cause. True member motivation is based on a messaging that makes people feel positive about belonging.

Taking members for granted. Members are "customers", and serving them well is important. Find new and personal ways to give prospects and members the tools and information they need to take full advantage of their membership.

Pricing services inappropriately. Price connotes value. While associations need to be careful that they don't price out their members, an association that is "on sale" can send the wrong message about quality and value. On the other hand, if the price is too high, they may decide not to join.

Giving potential members a free ride. It's important to understand the differences between the ways in which 'freeloaders' and participating members connect with the organization. There are some great ways to close the door to "free riders" and provide incentives for them to join and become active members.

Ignoring the competition. Be aware of the competition and know what you need to do to keep up with them. Answer the question: "What can you offer people that they can't?" This is your unique selling proposition (USP). Capitalize on it.

Resisting change. Change is a constant. With decreasing revenues and external pressures, associations are increasingly called upon to make dramatic changes. Highlight the benefits of the change, as well as the new opportunities and challenges that the organization will face.

Falling into merger mania. The strongest connection between an association and its members is often the association's name. Take that away, and the connection can be broken entirely. If merger is a valid option, make sure that it makes sense from all perspectives, and that your purpose and vision are not lost in organizational confusion.

Accepting irrelevance. Sometimes, associations are victims of their own success. Position your association in your members' mind, remember the lessons of how to avoid failure, and use them for positive changes that lead to success.

For associations to realize success from failure: (a) know why it exists and stay true to that purpose; (b) serve and appreciate the membership; and (c) keep your eyes and ears attuned to what is around. Remember that it is not the failure itself, but the failure to learn from it and move on, that is the biggest problem for an association.

Chapter 2: An Association Executive's Toolkit

Key operating ratios for associations

Financial management is one of the key tasks of an association executive. A consistently healthy financial condition is necessary for the growth and sustainability of an association. Many associations fall in the wayside because their board and/or management do not know or are not familiar with the financial operations of an association that has distinct characteristics as compared to a business enterprise. This is where operating ratios come in:

Non-dues revenues (NDRs)—Reliance on membership dues has decreased, so associations are continually looking to develop NDR streams. Simply defined, NDRs are money derived by an association other than membership dues. (Read my column, “Beyond traditional revenue sources,” published on October 5, 2017.)

In the United States, according to a report of the American Society of Association Executives, trade associations' (whose members are institutions) NDRs look like this: meeting/convention registration fees (10.4 percent); exhibit/trade show booth fees (9.7 percent);

certification/accreditation/standardization/evaluation revenue (5 percent); meeting sponsorship revenue (4.6 percent); and educational program fees (4.5 percent). Altogether, these comprise 34.2 percent of trade associations' total revenue.

For professional societies (whose members are individuals), the NDRs are: meeting/convention registration fees (12.5 percent); educational program fees (7.5 percent);

contributions/grants/contracts non-government (7.2 percent); exhibit/trade show booth fees (6 percent); and certification/accreditation/standardization/evaluation revenue (4.7 percent), totaling 37.9 percent of total revenue.

Efficiency—The operating efficiency ratio, represented as a dollar figure, is an organization's total revenue divided by its total assets. \$1.20 is the average amount of revenue associations reported generating for every dollar in assets.

Membership dues—Membership dues are the largest single source of association revenue, but its share has been shrinking over the long term. The extent to which membership dues contributes to an association's bottom line varies widely by association grouping. The average membership dues revenue as a percentage of total revenue is 41.4 percent for trade associations and 34.2 percent for professional societies.

Net profitability—This is defined as the difference between the organization's total revenue and its total expenses, shown as a percentage of total revenue. Net profitability as a percentage of total revenue is 0.7 percent for trade associations and 1.7 percent for societies.

Productivity—A good overall measure of employee productivity is total revenue per

employee. Keep in mind that total revenue per employee can be distorted by inflation, so use caution when analysing this ratio over time. The average total revenue associations reported per employee is \$216,471.

It would be worthwhile for associations here to refer to these operating ratios and compare theirs to the US benchmarks. This would help them analyse their current financial situation and adopt measures to adjust, improve and innovate.

Storytelling for associations

What comes to mind when you hear of Aesop, Mother Goose, Walt Disney and our own *Lola Basyang*? You guessed it right: storytelling!

According to Wikipedia, “storytelling” refers to oral storytelling and to techniques used in other media to unfold or disclose the narrative of a story. The power of storytelling is now being successfully applied in business organizations. When done well, business storytelling provides a compelling reason for your consumers to buy from you. A good brand can inspire trust and loyalty from customers, employees and suppliers.

Storytelling can benefit associations, too. Emily Bratcher, a contributing editor for the *Associations Now* magazine of the American Society of Association Executives (ASAE), cited the case of the International Sign Association (ISA), which incorporated a storytelling strategy in its marketing effort. “Associations are successful when they are working on behalf of their members,” wrote Alicia Auerswald, ISA vice president of marketing, membership and communication, “but it isn’t nearly as powerful as a member standing up and saying, ‘ISA worked on my behalf and here’s how.’”

How does an association go about finding stories to tell? ISA reached out to Seth Kahan at Visionary Leadership for guidance in creating its master story, and the first step was answering the following questions that would provide the framework for the overarching stories that ISA would tell:

- What is the one thing you do better than anybody else?
- What are audience’s wants, needs, and pain points that you can help solve?
- Why should your audience care?
- Why would your audience need you and your solution?
- Why should they pick you over the competition?

Next, ISA gathered its executive leadership team and then its full staff at a daylong retreat to craft its master story. After this, the ISA brought it to its board and key steering committees. “This was important for a few reasons: one, it brought additional buy-in to the project,” Auerswald said. “But, more important, it added another 30 people who worked in the industry day to day to help find these stories.”

The ISA now uses its stories in blog posts, videos, testimonials and article placement

in key industry trade publications. The ISA also markets its annual conference with stories. “The event draws about 10 times our membership so we have to extend our reach quite a bit,” Auerswald said. “But getting a business owner to justify time away from the office and the expense of taking staff is a hurdle. Having other attendees tell how they used something they learned or a product they saw to grow their business is a strong selling point.”

Storytelling is a powerful form of communication, and “good storytelling has drama and character, obstacles to overcome, and challenges to meet,” Auerswald said. Most associations are out there, day in and day out, working on behalf of members, solving issues that matter to them but are not always so great at telling stories. Are you ready to tell your stories?

Associations and cathedral thinking

In my reads, I always try to pick up and write about interesting acronyms, buzzwords and ideas that I feel will resonate with and apply to associations, including this one, which I am sharing with you.

Author Rick Antonson considers himself as a “cathedral thinker.” He says cathedral thinking is about adopting the long-term view, doing things today that are important for generations and knowing that you will be involved in an unfinished work. It sounds like this concept can be relevant to associations, too.

The concept of cathedral thinking, he elaborates, stretches back to medieval times when architects, stonemasons, and artisans laid plans and began the construction of soaring and cavernous structures that would one day serve as places of worship, community gathering spaces and safe havens. Those who began such work knew they’d never live to see their task completed. Yet, their actions kept the living generation tethered to the future.

The concept of thinking that these “cathedral builders” did, in Antonson’s mind, is synonymous with long-term planning.

Cathedral thinking has since been applied to space exploration, city planning, corporate mandates, and other long-range goals that require decades of foresight and preparation so future generations can enjoy their full realization. Though there are many instances in which cathedral thinking can be applied, they all require the same foundation: a far-reaching vision, a well-thought-out blueprint and a shared commitment to long-term implementation.

I think association leaders (boards and managers) should, likewise, be cathedral thinkers. Associations are there for the long haul because of their strategic purpose, cause and advocacy. As defined, associations are organizations or groups of individuals affiliated with one another, who share a common purpose, interest or mission, and exist for the mutual enrichment and advancement of their membership. Members will come and go, but the association’s reason for being will live on for a long time. Here are my cathedral thoughts for associations:

- **Association's purpose** – Ensure that the association's "why" (e.g., why it does what it does, why it exists and why it serves a higher purpose) is crystal clear and timeless.
- **Associations as communities** – Build the association around the concept and strategy of a community where members know each other, help one another and celebrate together.
- **Associations' additionality role in society** – Create offerings and activities that enrich lives (e.g., volunteerism), nurture competitiveness (continuing education, industry standards, research) and impact the economy (enterprise development, product innovation).

So, what is your cathedral thought for your organization?

The power of why

As an association executive, I have facilitated strategic retreat sessions several times for the association that I work for and also get invited to do similar sessions for other associations. For me, building a strategic thinking culture in associations (and even in business organizations) is critical to growth and sustainability.

Strategic retreat is not strategic planning per se. Strategic planning is a systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them. A strategic retreat, meanwhile, is a good team exercise to take stock and gauge the progress in achieving your strategic plan. It is an opportunity to step back (i.e., retreat) from your daily routine to discuss needed adjustments to your plan or other pivotal organizational issues. Interestingly, the term "strategic retreat" has its origins from the military – the retreat and regrouping of forces.

I recently conducted a strategic retreat session for the board and senior management of a convention facility. In my research for an appropriate framework to come up with a foundational and inspiring statement of purpose and commitment for the organization, I found out and decided to use Simon Sinek's "Golden Circle" concept.

Management theorist, author and motivational speaker Sinek purports that great and inspiring organizations seem to create their foundation by first addressing the question of *why* they exist, then *how* they go about their purpose, and then finally, *what* they do – the exact opposite many organizations do and communicate.

He adds that people don't buy what you do, they buy *why* you do it and cites the example of Apple. Here's Apple's Golden Circle statement:

In everything we do, we believe in challenging the status quo and thinking differently. The way we challenge the status quo is by designing our products beautifully, simple to use and user-friendly. We just happen to make great computers.

Notice that Apple started with its “why.” The sequential questions to be answered are:

- **Why** – the core belief of the business; the reason the business exists;
- **How** – the manner by which the business fulfils this core belief;
- **What** – the things the company does to fulfil this core belief.

I think starting with *why* is very much valid for associations, as well since they exist for a purpose, a cause, or an advocacy. “Purpose” has a deeper meaning and impact as it strikes at the very core of an association and answers these basic questions: “Why do you do what you do?,” “Why do you exist?,” and “Why do you serve your cause?.” So purpose is the beacon that guides and answers the *why*.

Members and leaders of associations must know by heart their purpose for strategy and direction. If you are not clear about your purpose, then you will not know what to do and where to go. This is as basic as it can get.

Association ‘pain points’

As an association executive, a columnist and a blogger on topics revolving around association governance and management, I subscribe to many association-related e-newsletters to broaden my knowledge and get inspired. I pick up new ideas, catchphrases, and slang words from time to time.

In a recent Skype call with US-based AssociationSuccess.org’s Arianna Rehak, I learned a new phrase: “pain points”.

While comparing the challenges of associations in the US, Arianna asked me to identify the three pain points of associations in the Philippines. The question made me pause for a while then quickly grasped what she meant. After our call ended, I immediately Googled “pain points” and learned from the post of Jeffrey Carter that a pain point is a “problem, real or perceived.”

So based on my assessment of the challenges working for the Philippine Council of Associations and Association Executives (PCAA), I came up with these three pain points that that associations in the country are facing:

Member engagement: Associations need active, engaged and passionate members as this brings about positive and long-lasting mutual relationships. Studies show that members who are engaged renew their memberships and even help recruit new members. But member engagement is not necessarily simple to achieve. There are strategies and techniques to do this (see my column on “Effective Member Engagement” on September 28, 2017).

Revenue generation: Associations need financial resources to sustain their work and advocacies. Reliance on membership dues alone will not work for the organization. Recent research has shown that the ratio of membership dues to total revenues has

drastically declined over the years and now only constitutes 30 percent to 45 percent. This means that non-dues revenues (NDR) is now filling the gap, as my column on “Beyond Traditional Revenue Sources” on October 5 states.

Communications programming: Associations develop and provide unique and innovative services that are relevant and useful to its members and the broader public. These include educational courses, industry studies and standards, and the like. They contribute, too, to social and economic development through community missions, enterprise creation, trade facilitation and others. Yet, most often, these noble deeds are not effectively communicated even with the many communication channels and technologies available today.

These pain points are interrelated. Good communications lead to better engaged members and, in turn, generate greater revenues.

Beyond traditional revenue sources

The days of associations relying solely on membership dues to survive have long been over.

Based on the American Society of Association Executives (ASAE) Foundation’s “Association Operating Report”, now on its 15th edition, there has been a marked percentage decline in membership dues to total revenue since ASAE started reporting it in 1953. Back then, membership dues represented 96 percent of total revenue.

In 2016 trade associations and professional societies in the US reported that only 45 percent and 30 percent, respectively, of their revenue came from membership dues.

Enter non-dues revenue (NDR). Simply defined, it is any money derived by an association other than membership dues. There are generally two types of NDR: revenue earned from vendors, advertisers and suppliers interested in reaching out to associations to promote their wares; and revenue obtained from charging members additional fees for conference registrations, webinars, books, professional certifications, publications, merchandise and the like.

The ASAE study said these days, NDR coming from trade show booth fees and meeting and convention registration fees are increasingly accounting for large shares of total association revenue.

According to another US-based group, Avenue M, which surveyed nearly 200 association executives, associations are going beyond traditional revenue sources by monetizing their data in the form of market intelligence, benchmarking data, data analytics and custom research. Around 32 percent of the respondents offer vendors custom-research opportunities, such as survey panels, focus groups or interviews with members; 25-percent derive revenue from benchmarking data; and 19 percent earn from selling market intelligence or data analytics. A few (6 percent) earn revenue from training programs to vendor sales forces and certification for sales/consulting staff.

When asked what new programs are providing additional NDR to the organization, 49 percent cited mobile app advertising, 21 percent cited social-media advertising, 20 percent sponsored videos/podcasts and 18 percent sponsored white papers.

Based on the same survey, associations are also offering their members, customers, vendors and the public, new programs, products and services such as enhanced online membership listings, soft skills training, leadership workshops, career/resume assistance, booth sales at career fairs, new levels of preferred partnerships, registry, office space rental, health insurance and supplier sales events.

To increase non-dues revenue, the report suggests the following measures:

- Create partnerships that solve vendors' challenges. Conduct surveys and focus groups with current and potential partners to better understand what information they need to achieve their sales goals and meet the needs of existing clients.
- Customize sponsorship opportunities. Develop "a la carte" options that cater to different needs and budgets of vendors and suppliers.
- Cultivate relationships with all organization types and sizes. Create opportunities for smaller companies and start-ups. Some of these companies may grow and become bigger contributors to the association.
- Expand opportunities within your association's current portfolio. Look for ways to provide expanded listings or advertisements and charge more for VIP opportunities for event attendees.
- Leverage existing data and relationships to provide unique insights and information into your industry. Offer potential business partners access to aggregated data, customized research panels and focus groups.

It's amazing to know how associations in the U.S. have evolved and adopted new business models. Revenue diversification for associations in the Philippines is still a big challenge. My organization, the Philippine Council of Associations and Association Executives, the "association of associations" in the country, is providing training programs, publications and other knowledge resources for associations to further expand their NDR, among others.

Strategic framework for associations

Most organizations, including associations, prepare some kind of a plan or document to serve as their guidepost for operational directions and actions. This task emanates from the board of directors in the context of business organizations and board of trustees in the case of associations and other not-for-profit organizations in the Philippines.

According to the latest board self-assessment benchmarking data of BoardSource, a Washington, D.C.-based non-profit organization that specializes in board service and governance, strategy and planning remains at the top of the list of areas needing board improvement.

The report also mentioned that non-profits most often focus on creating one of four documents when engaging in strategic planning, but reliance on formal strategic plans is waning in favor of more flexible strategic frameworks. These documents include the following:

Operational/Annual Plan – incorporates strategic goals and their related objectives/strategies that identify specific action steps, as well as a monitoring and evaluation process, complete with clear metrics and timelines.

Business Plan – combines programmatic and operational goals with financial forecasts and is often used in developing a new program or generating earned income through some mission-related business venture.

Strategic Plan – is a formal process for examining what actions are necessary to move an organization forward, taking into account its environment and context, and includes a written list of the actions needed to carry out a plan, often based on comprehensive data analysis, covering a period of time, usually three- to five-year horizons.

Strategic Framework – articulates organizational priorities and provides overarching guidelines for organizational operations, often instead of specific goals, that allow organizations to quickly and efficiently respond to change while still adhering to strategic principles.

Given the non-profits' increasing desire for more flexibility, many have begun experimenting with alternatives to formal strategic plans. Most often, non-profits now turn to strategic frameworks, combined with business plans and more robust annual plans, to guide their operations. Frameworks allow organizations to adapt to change and take advantage of opportunities as they are presented. They focus on the big picture, not the nitty-gritty of the plan itself; are more flexible and nimble; and provide for prioritization and decision-making for management.

Strategic plans are intended to be living documents that evolve with the organization, but too often, organizations fail to hold themselves accountable for achieving the timelines and goals set forth in the long-term plans.

While strategic frameworks can provide a better way of guiding the organization without creating long-term deadlines and required actions, there are still important ways for organizations and their boards to monitor progress and evaluate performance. Among others, it may be prudent to refer back to the framework in less formal ways, such as using it to guide board and staff meetings, program development meetings, or performance reviews.

Associations and Personalization

“Personalization” has different meanings to various people and sectors. Web pages, for instance, can be personalized based on desired characteristics (interests, social category, context), actions (click on button, open a link), intent (make a purchase, check

status of an entity) or any other parameter for a tailored user experience. The same is true for mobile phones (interactive wallpaper), print media (demographic targeting), promotional merchandise (t-shirts, key chains) and others.

Personalization has also found its way to the events industry and, consequently, to associations and other member-based organizations that organize meetings, conferences, exhibitions and other events.

In the study, “Personalization: Creating Tailored Event Experiences”, UK-based Eventsforce cites that successful personalization involves the delivery of relevant content and experiences to the right people at the right time. Among the study’s key results are as follows:

- 82 percent of event planners said personalization is a key priority, but only 27 percent of them use it in events marketing;
- 60 percent mentioned personalization as equal barrier, lack of time and internal resources, while 49 percent cited cost, 38 percent, lack of technology and 31 percent inaccurate data;
- 65 percent said they used online surveys as data-capture tools to create a more personalized experience for attendees, 44 percent said events apps; 42 percent, social media; and 36 percent, registration tools (RFID, bar-code scan), while other ways cited were voting buttons on apps (24 percent), speaker-rating systems (21 percent), attendee networking tools (18 percent), interactive screens, tables and kiosks (12 percent), wearable technology (2 percent) and iBeacons (1 percent);
- 68 percent used e-mail communications to personalize the delegate experience prior to an event; 57 percent, through unique registration paths for different attendee types; 38 percent, personalized content; 32 percent, printed letters, direct mailings; 21 percent, personalized web content; 19.5 percent, both for attendee networking tools and event apps tailored for VIPs, sponsors, exhibitors and attendees; 16 percent, multilingual-event web sites; and 4 percent others;
- 38 percent of event planners said they break down their attendees into categories (event goals, job titles, session selections, company size) when deciding on marketing activities around the event, 37 percent said sometimes and 25 percent said no;
- 2 percent mentioned that they use the attendees’ data from their other business systems (CRM, marketing, membership) to create more personalized content, 27 percent said sometimes and 31 percent said no;
- 62 percent used crowdsourcing tools with their attendees to determine user-generated content (agenda, topics), speakers, dining and décor, and 38 percent said no. Of the 62 percent, 44 percent applies to content; 24 percent, to speakers; 18 percent, to dining preferences, 7 percent, to entertainment, and 1 percent, to décor.

By knowing and analysing these data and statistics, associations that organize events by themselves or employ event-management companies should be able to

plan appropriately and execute their events better with their attendees' aspirations and expectations in mind. It is no longer the event per se that attendees will remember in the end; it is the experience of attending it.

Communicating association advocacies and services

An association's reason of being is twofold: to advocate and stand for a cause, and to serve its members' needs and aspirations.

An association, therefore, does something good for its members and for society as a whole. But doing good is one thing, and communicating this good is another.

For an association to remain relevant and sustainable, it needs, among others, to communicate and articulate its work and advocacies, not only to its own members, but to the public, as well. This is especially true in the sphere where our association, ADFIAP, operates, i.e., development banking.

The 'unknown side' of banking

Not many people are aware that there is such a thing as development banking. The word "development", when attached to the word "banking", obviously sets it apart from other banking activities, such as, for instance, commercial banking.

Development banks, or broadly and interchangeably called development finance institutions (DFIs), are government-owned or -controlled financial institutions found in many developing countries that provide long-term financing and technical assistance to enterprises and projects that are of priority and interest to the country's socio-economic development. DFIs fill the gap in the financial system and go into financing activities that commercial banks may be unable or reluctant to do.

Events, like financial crises, have put more emphasis on the role of development banks. As markets become jittery during these times, commercial banks usually hold back lending, resulting in small businesses getting cash-strapped. Used by governments as policy instruments, development banks provide the necessary liquidity by making funding available to small businesses, as well as to infrastructure projects, which keep and generate employment.

Diversity in membership

ADFIAP's mission is to advance sustainable development in the countries where the association has members, using finance as a leverage to make this development happen. In our context, "sustainable development" means having "quadruple bottom-line" results with economic, environmental, social and governance dimensions. These are the four pillars of ADFIAP's work and advocacies.

ADFIAP has 106 member-DFIs in 39 countries and territories in the Asia-Pacific region and the constant challenge for its secretariat in Manila is how to communicate its services and knowledge resources to this diverse and geographically dispersed membership.

Niche platforms to communicate

Aside from its official web site that features general information about the association, news from members, publications, training events, etc., ADFIAP has several microsites.

Wikipedia defines a “microsite”, also known as a landing page, mini site or Weblet, as an Internet Web design referring to an individual Web page or cluster of pages that are meant to function as an auxiliary supplement to a primary web site.

ADFIAP currently has altogether 12 microsites. Three are project sites that cover its environmental, social and economic advocacies; three provide knowledge and branding resources; two for big events; one is a community and e-learning site; and three covers the association’s service units, i.e., a training institute, consulting unit and CSR center.

In ADFIAP’s experience, microsites offer its members, partners, donors and the public a platform, a resource and a service that are specific, focused and relevant to a targeted audience. At the same time, microsites provide an association, like ADFIAP, an opportunity to communicate its work and advocacy, show their results, and be more innovative in terms content and delivery of services.

The ‘5-E Test’ for associations

While the purpose of an association is “community,” its “business” is providing service. The challenge for associations in these “non-dues revenue” times is how to generate income from sources other than membership dues.

A route that my association – the Association of Development Financing Institutions in Asia and the Pacific – took was to set up an advisory and consulting business unit. We realized that there is an opportunity here because of our cumulative years of experience and expertise in the industry and a natural market for this service within our midst, i.e., our members.

To determine the feasibility and sustainability of this business venture for the association, we devised a “5-E Test,” which asked the following questions:

1. **Expertise:** Is the business within the association’s capability to undertake? This is an important question to answer as this will determine the best business strategy to pursue, knowing: (a) who the customer is (other than our members); (b) what difference can the business make; and (c) which direction can the business track as it goes forward. If the answer is “yes” to all three, then it should trigger a green light to proceed with the business plan.
2. **Eligibility:** Does the business fit the association’s mission and advocacy? While the association may have the expertise to undertake the business, it is also equally important to determine whether the business will enhance the association’s mission and advocacy. In the end, it may not be all about financial improvement for the association, but more fundamentally about maintaining its credibility and prestige.

Again, if the answer to this question is “yes,” then it has a reason to go ahead with the business.

3. **Exclusivity:** Does the potential customer know the association? The idea behind this question is to assume whether members of the association can be a captive market for the business. With a large membership network, the opportunity for the business may certainly be enormous if properly managed. The target, however, is to go beyond your members, as this will expand the market potential for your service offerings.
4. **Equal opportunity:** Does the business have a fair and equal chance to be considered by the market? Referring to No. 3, you cannot also simply assume there is a market within the membership and, in addition, rely entirely on the association membership for business opportunities. There should be a “Plan B” when the first option does not work as planned.
5. **Economics:** Would the business be sustainable in the long run? This definitely is the hardest question to answer. Like any business endeavour, the challenge of sustainability is always difficult to predict. But if you do your homework properly and you get the support of all stakeholders, including your members, then the probability of success is going to be high.

The 3 Rs of association management

On August 8, 2018, the Philippine Council of Associations and Association Executives (PCAAE), the “association of associations” in the country, and EventBank, a leading cloud-based engagement management technology company, jointly held a panel session on “Best Practices in Membership Management” at the Philippine International Convention Center. The event was attended by over a hundred participants from associations, chambers of commerce, and other membership and service organizations.

The panel was composed of myself; Mr. Charlie Villasenor, chairman of the Procurement & Supply Institute of Asia; Mr. Ebb Hinchliffe, executive director of the American Chamber of Commerce of the Philippines; and Eloisa M. Acosta, chief operating officer of the Institute of Internal Auditors Philippines. It was moderated by Eric L. Schmidt, cofounder and CEO of EventBank. The panel discussed wide-ranging topics on membership engagement practices and challenges, member retention rates, key performance indicators for associations, data protection issues, social media, technology adoption and other related subjects.

During the panel discussion, I shared three mutually reinforcing factors that would make or break an association. I called them the “3 Rs” of association management, adapting it from the 3 Rs that we learn in grade school which refer to the foundations of a basic skills-oriented education program: reading, (w)riting, and (a)rithmetic.

According to Wikipedia, the phrase 3 Rs came from a speech given by Sir William Curtis, a member of Parliament, in about 1795. Since its original creation, many others have used the term to describe other “sets of three things.” So, here is my adaptation of the 3 Rs

in association management which I learned from experience:

Relevance—This goes back to the fundamental adherence of an association to its purpose and mission and, consequently to the value proposition it provides to its members. In the *7 Measures of Success: What Remarkable Associations Do that Others Don't*, published by the American Society of Association Executives (ASAE), successful associations have kept their products and services aligned with their mission even in the midst of changes in the external environment.

Relationship—This relates to the engagement of the association, first and foremost, with its members and then with other stakeholders, e.g., partners, donors, regulators, etc. Effective member engagement plays a crucial role in promoting an association's core values and message. Engaged members act as “brand ambassadors” and become a key asset able to transform passive members into “multipliers,” according to the Geneva-based MCI Group, a global research and consulting organization (please refer to my column on September 27, 2017, entitled “Effective Member Engagement for Associations.”) Building and nurturing relationships is an essential part of an association's DNA.

Resources—This refers to human, financial, and collaboration resources that an association needs to develop, maintain, and increase for growth and sustainability. First, the quality of an association depends on the quality of its people. Second, associations need financial resources (and ample reserve funds) to operate and sustain their work and advocacies. And third, associations have to take advantage of what partnership and collaboration opportunities additionally bring to their benefit.

Taking the LEAD on associations

In my over 25 years (and counting) as an association executive, I have come to the conclusion that leadership is all about people, planning and passionate execution. I refer to this as the “3 Ps of Association Leadership.” This definition is further divided into four elements contained in the acronym LEAD.

- “**L**” is for “levelling with people.” Starting with your members, your board and down to your staff, nothing beats being fair, accountable and transparent – hallmarks of good governance. I remember when I took over as chief executive of my association 11 years ago, my first proposal was to have a board of directors’ “retreat” to review our organization’s vision and mission, and to draw up a strategic plan to guide us forward. The result was a resounding success; not only in terms of new and fresh statements of vision and mission for the association, but also a strategic plan that is focused and relevant to our members and other stakeholders.

Another good thing that came out of the exercise is that this initiative cascaded down to the secretariat staff that I headed. Armed with a new strategic plan, a mandate from the members and the board, and ultimately an implementing work plan, I was able to structure the staff into functional business units, so each one precisely knows his or her respective role in the organization.

Another aspect of levelling with people is constantly informing them on the goings-

on in the organization, whether these are good or not-so-good news, e.g., telling the staff whether they are performing well or below par. Communicating and engaging with your staff is key. People appreciate truthfulness and honesty, especially if this comes from their leader.

- **“E”** refers to “executing effectively and efficiently.” This pays importance to plans and openness to people. Equally important is executing the plans with pinpoint efficiency and effectiveness. Here, attention to details is the norm.

Executing effectively means you are able to monitor and measure the performance of your organization, thus it is necessary to develop key performance indicators (KPIs), which may include, among others, membership recruitment and retention rates, revenue-to-asset ratio, membership services provided, visibility actions, budget-cost rendition, etc.

Executing efficiently entails not only that your organizational structure is adaptive to its mandate, but also flexible enough to manoeuvre in case of uncertain times. Also in this regard, is making sure that the organization can function well despite staff travels, absences and resignations.

- **“A”** is for “acting decisively.” This is part of execution, but focuses more on leadership quality: the ability of the association chief executive to act prudently and decisively on issues and challenges facing the organization as it operates on a day-to-day basis. A good leader is one who makes informed decisions, hence the necessity to know the “ins and outs” of the organization’s business and field of expertise. This can only happen if the leader is, in the first place, technically competent on the subject that the association is promoting or advocating.

Decision-making is a process in which everyone in the organization is bound to contribute his or her share of ideas and beliefs. Ultimately, however, it is still the leader who is solely responsible for his or her actions.

“D” stands for “drive with passion.” Associations, they say, are like small democracies, with the members, board of directors, staff and volunteers interacting with each other, and building consensus on issues confronting them and their organization. An election of the board is also part of this democracy, as well as the respect for the rights of all involved. For all the association’s uniqueness and intricacies, an association chief executive must be able to navigate this vast and different interests with flair and wisdom and, more important, with the passion to serve.

Engage and grow

If you Google the word, “engage,” you will find many synonyms for it – in this column, I will use three that are relevant to me and important for associations to grow and prosper.

The first synonym is “to participate or to become involved” and this has to do with an association’s most important stakeholder: its members. In my column on September

27, 2017, I mentioned that member engagement in the association world is the hardest to undertake and measure among the five stages in the membership-life cycle framework, i.e., awareness, recruitment, engagement, renewal and reinstatement.

The main reason for this is that member engagement is multifaceted and dynamic and associations find it more daunting and challenging to undertake. It is, in fact, holistic as it is strategic as you will note in its definition by the American Nurses Association, to wit:

“Member engagement is the investment of time, money, attention, and participation, by both the association and its members, in order to provide meaningful, long-term, mutually beneficial experiences and relationships that advance the profession.”

The second synonym is “to attract or bring together” and this applies to the engagement of an association with its stakeholders other than members, such as supporters (e.g., donors, sponsors), partners (service collaborators, e.g., academe) and government (e.g., regulators, policymakers). Needless to say, engaging with these stakeholders brings forth tangible benefits (e.g., funding) and nontangible benefits (e.g., expertise, enabling policy environment) to an association.

The third synonym is “to begin and carry on an activity.” By this, I refer specifically to the use of technology to propel associations forward as they are now constantly challenged, among others, by declining revenues, competition from Internet-based knowledge resources, and changing demographics, e.g., the entry of millennials into associations.

Technology-based solutions, such as using association management software (e.g., for member dues collection, event registration, communication tools and accounting), will make associations more interactive, agile and efficient in their operation.

So engagement in the association context is actually making a strategy which an association can plan, implement, and measure. By putting the above three meanings of engagement together, I have developed a simple “growth formula” for associations:

Engagement with members + engagement with partners, donors, sponsors, other stakeholders +

Engaging in tools and technology = Growth (in membership, in activities, in revenues).

I know that this “formula” is easier written than done, but I have learned, as an association executive myself, that by being open to ideas, looking beyond your usual confines, working with others and having more creativity and agility, can help your association do more for the benefit of your stakeholders and your cause, weather challenges, grow steadily and progress into the future.

Is branding for associations?

This was exactly the question that Chris Dingcong, Hong Kong-based Filipino brand consultant, founder and creative director of Springtime Design, asked around 200 association members who attended his plenary session at the Fifth Philippine Council of Associations and Association Executives (PCA AE) Associations Summit (AS5) held recently

at the Philippine International Convention Center.

At a follow-up small group session entitled, “Why your logo is not a brand?” during the Quarterly Quorum event of the PCAAE in January 2018, Chris reemphasized what branding is and is not.

He started by saying that branding, among other things, is about “stories to tell.” It is not entirely just about the graphic representation of an association in the form of a logo. The visual representation of a logo as a brand becomes more meaningful and valuable if it encapsulates and communicates effectively the association’s core identity: its brand voice, mission, vision, values, goals and brand story.

Surrounding and supporting this core identity are the brand components and applications that capture the identity of the association’s brand in the form of a brand identity system. Brand components, such as the logo, tagline, imagery, colours, shapes, tone of voice, layout, style and font type are ingredients in creating the unique identity system of an association’s brand communication. They include corporate stationery, web site, videos, office environment, brochure, social media, etc. All these, Chris mentioned, are relevant in designing and building a brand.

“Branding is a process” and brands should be nurtured, he continued. The design process, from research, brand strategy formation to the creative expression of the logo, is part of the big idea of a brand. Chris added that creating a brand entails incorporating five essential components into one coherent communication, as follows:

- **People** – the association’s main asset. Whether a volunteer or an employee, they provide time, expertise and contacts.
- **Belief** – reflects the association’s core values, which drive its people to achieve positive and progressive outcomes.
- **Cause** – describes the organization’s mission and is a fundamental part of the brand story.
- **Stories** – represent the many “voices” of the association and its members. Woven together, they are powerful ingredients of the brand.
- **Advocacy** – is about the association’s purpose, which is the core and reason for being.

Finally, there’s brand management which is a critical part in nurturing brands and requires the commitment of the organization’s leadership, involvement of the staff and identification of those who will champion the brand.

How does an association start to brand itself? He suggests the following tips:

- Discover who you really are.
- What is the essence of who you are?
- Focus on relationships.

- Tell your story.
- Be consistent.

So, is branding for associations? For me, the answer is rather obvious. If countries do branding (for tourism, etc.), companies do it, too (to sell their products) and people, as well (for personal equity), so why not associations? “Associations touch lives,” Chris said. It is at best imperative for them to do so!

Get updated with a relic

The word “relic” connotes antiquity and outmodedness, so how can one get updated with a relic? Well, only when it is not the word relic per se but an acronym. Here’s what I mean.

As an association executive, I need to brush up and keep abreast of what’s happening in the association world, here and abroad. I also have to continue learning. Association management is a distinct field of management because of the unique environment of associations.

Associations are unique in a sense that their main stakeholders are dues-paying members. Typically, the association board selects, retains and evaluates a CEO (or an executive director) who is responsible for the day-to-day management of the association and its paid staff.

Association managers are responsible for tasks similar to other organizations, such as human-resource management, financial management, meeting management, information-technology management and project management. Still, there are other aspects of management that are unique to association managers, such as membership recruitment, retention and engagement, volunteer management, development of non-dues revenues and fund-raising. Association managers must also be familiar with laws and regulations that pertain only to associations.

Based on my experience, there are three tasks that an association professional needs to do to continue learning and improving on association management, and the acronym for these tasks is “RELIC”, which stands for:

RE – is for reading. I subscribe to a lot of publications and articles on association management and governance, both online and in print. Online articles come in the form of blogs, e-books, e-magazines and e-newsletters. Prints are basically magazines from publishing companies that cater to associations and the events industry, as well as those produced by international associations and association management companies.

LI – is for listening. As much as I can, I regularly attend seminars, webinars and forums on association leadership and related areas. Most expositions for the meetings, incentives, conventions and exhibitions industry have a so-called Associations Day, which covers diverse educational topics, such as membership, marketing, communications, branding, sponsorship and volunteer management. I listen intently to speakers and experts

and contextualize their ideas and strategies into my own association.

C – is for connecting. I keep in touch with people I meet in conferences: fellow association executives, subject matter experts, authors, top-notch speakers and resource persons. I seek their advice, invite them to speak in our own training programs and collaborate with them in joint activities. Connecting people and ideas is an essential part of the task of an association executive.

So the “RELIC” is a way of keeping yourself updated in your work as an association professional. After all, a “relic” also connotes something of value that has survived the test of time.

Association events and the ‘5 Stars’

I’m writing this in January, the month of Janus, Roman god of beginnings and transitions, and a good time to plan ahead. While Roman mythology may have influence in the stars as some people may believe, the “5 STARS” in successful association-event planning is actually an acronym:

Site or event destination – The Association of Development Financing Institutions in Asia and the Pacific (ADFIAP) has representation in 40 countries so site selection for hosting its annual conference is on rotation basis to give members an opportunity to showcase their country.

The second aspect is the event venue and the essential factors to consider in its selection to include, among others: (a) location, (b) facilities, (c) service staff and (d) pricing – normally in this order of importance.

For a hotel location, the two key elements would be accessibility, as well as security arrangements. Facility-wise, the three main areas are: (a) function rooms – comfortable seating setups, air-conditioning, lighting, sound system, foyer space, presentation equipment, meal service and overall layout; (b) guest rooms – cleanliness and available amenities, such as tea/coffee service, toiletries, cable TV, Internet/phone/fax connections, iron and board, newspaper, etc.; and (c) other conveniences, e.g., gym, pool, dining outlets, lobby area and business center. A very important consideration in selecting a hotel is its service staff. While pricing is also a crucial consideration, this is often negotiable.

Topic – A business event is a learning activity so design and development of the conference theme and the session topics are important. The content must be current and relevant, with great takeaways for attendees. Based on our experience, attendees get a premium if the event offers something that could help their businesses: (a) add value, (b) save money and (c) solve problems.

Activities – Four areas are considered here: (a) learning—further discussed below under speakers (b) networking (c) awards and (d) leisure. On networking, event planners need to put meeting opportunities in the program. In addition, organize rooms where these will be held. Other networking possibilities should be structured so delegates can meet during coffee breaks, meals, tours and golf games, as applicable.

An awards program has also become an important part of our annual convention and has been an event-attendance booster, as well. Perks like tours, sports and shopping trips are an integral part of each conference for the delegates and their accompanying persons.

Resource Persons/Speakers – In the choice of resource persons, we look at three considerations: (a) area of expertise, (b) experience as a presenter and (c) willingness to stay and mingle with the delegates.

Secretariat Support – The final element are the people running the event. These are, in real terms, the “stars of the show,” for without the event management staff, there is no event to speak of in the first place. In our case, the event-management team is a joint unit of the member-host’s staff and the association’s secretariat. Supporting the process is an extensive to-do list we have developed over the years and a host of other supporters: the hotel staff, the travel agencies, tour operators, service providers and many others. Another option, of course, is to engage the services of a professional conference organizer.

Association UX

Don’t let the “UX” in the title intimidate you. It’s not something out of this world. It’s actually an acronym for “user experience.” So what does UX got to do with associations?

I was reading one of my favourite e-newsletters and there was a topic on “green UX.” I understood instantly what “green” was but I wondered what UX meant? So I Googled.

User experience (UX) refers to a person’s emotions and attitudes about using a particular product, system or service. It includes the practical, experiential, affective, meaningful and valuable aspects of human-computer interaction and product ownership. Extending this definition further, the Nielsen Norman Group says: “User experience encompasses all aspects of the end-user’s interaction with the company, its services, and its products.” Aha! I thought UX certainly could also apply to associations.

Associations provide services and products to their members. In many cases, it is an association’s products and services that attract members to join and remain engaged with the association. Therefore, a great UX should be part and parcel of an association’s marketing strategy and operational mandate.

Here are a few ways for members and potential members to have a delightful UX in your association:

Sign-up process – In its e-book, *50 Ways to Boost Association Membership*, Aptify says to keep this process simple at every turn by limiting application form fields to only what’s completely necessary, by providing clear instructions with no room for interpretation, by using personalization in your e-mails and software, and by offering resources and tutorials to educate how to use the membership.

Mobile access – It’s becoming critical for associations to incorporate mobile more fully into their e-commerce and marketing strategies. In addition to addressing mobile-friendly factors like navigation and appearance, make sure mobile sites offer streamlined

mechanisms for volunteer recruitment and donations, minimizing the number of clicks to conversion.

Meetings and events – Event planning has now transformed into designing experience. “Events are in desperate need of becoming experiences that will allow audiences to savor the moment while looking ahead to something that will inspire, connect, or surprise them,” says Don Neal of 360 Live Media, at ASAE’s 2016 Springtime Expo.

Content – Most associations generate large amounts of content to support their members’ work and interests. In fact, so much of the association value proposition is connected to content, e.g., publications, education, standards, news from the field, etc. To ensure that content is relevant, timely, meaningful and well-coordinated across the organization, a comprehensive content strategy is vital.

Social media – In the same Aptify e-book, staying active in social media isn’t just for recruiting new members; it’s also a great way to keep your current members engaged. Don’t just post your own events and news on social media. Use it as a tool to interact with and promote your members. Liking, commenting or replying to comments on relevant posts is a great way to stay engaged with your members, and to keep a pulse on what they’re up to.

A CEO’s wish list for association staff

An organization is only as good as its people. This is also true for associations that, not only employ staff, but also attract volunteers for it to promote its work and advocacies. As a chief executive of an association, I embody the aspirations of my staff and volunteers. I call it by its acronym, “IF U CARE”, and here is what it stands for:

“I” is for initiative. I always value initiative as an essential trait of a fellow worker. Having initiative is doing one’s work beyond the call of duty, in fact, working extra without being told or asked to. The aim is to always constantly improve on the status quo. Initiative also equates to resourcefulness that spawns innovation within the organization.

“F” is for feedback. It is difficult to manage an organization without a feedback culture, which refers to the staff’s conscious effort to let their supervisor know the status of their assigned job. This communication channel allows for better interaction and engagement among everyone in the workplace.

“U” is for utility of ideas. Creativity and invention are the ultimate results of the sharing of ideas in the workplace. I aspire that each staff must be open to and ready to offer new and fresh ideas to improve productivity and excellence in service, especially in the case of associations where service is paramount to its very existence.

“C” is for concentration. Focus on the organization’s vision and mission and concentrate on how to fulfil them. Without persistence and the passion to deliver results, your association will be like a ship without a sail that wanders aimlessly in the ocean of uncertainty. Doing one’s job doggedly with the goal of continuous improvement is certainly a “must” behaviour of a staff.

“A” is for accountability. While everyone has the responsibility and the authority for their respective roles in the organization, there is a need for being accountable for their actions. Accountability means being responsive to the tasks at hand and being sensitive to the implications that may occur in their performance. Being accountable, however, does not mean to suffer from consequences of their actions, but to be aware that it is always better to prevent a miscue before it happens.

“R” is for reliability. Being there when needed and being able to lend a helping hand always is what reliability connotes. The essence of timeliness and orderliness also comes to mind. When you have no sense of time and order, you cannot fulfil what is expected of you to undertake at very crucial moments of the organization’s day-to-day operation.

“E” is for ethical behaviour. Habit builds character and character builds ethical behaviour. As they say, you cannot put a good person down. Such is the case in organizations made up of people. Ethics is one’s passport to credibility and credibility is the association’s asset to sustainability.

About the Author



Octavio 'Bobby' Peralta, affectionately called, "The Association Man," is presently the Secretary General of the Association of Development Financing Institutions in Asia & the Pacific (ADFIAP) and the World Federation of Development Financing Institutions (WFDFI). In November 2013, he founded the Philippine Council of Associations and Association Executives (PCA AE) and, in March 2015, initiated the setting up of the Asia-Pacific Federation of Association Organizations (APFAO). He is a long-time member of the American Society of Association Executives (ASAE). A PCA AE-certified

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