Are you paying enough attention to your relationships?

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I keep hearing stories from senior association staff relating to the challenges and opportunities in the area of relationships in the association community. Association management senior staff are engaged in a variety of relationships that are clearly changing at an unprecedented pace. The relationships that need to be managed involve boards, committees, general volunteers, members, chapters and other affiliates, peers, staff, suppliers, and key stakeholders (media, funders/donors, clients, bureaucrats and politicians, etc.).

Several key factors are fuelling near constant relationship changes. The most often cited is the use of technology, in particular the internet and email. Other factors include: changes in attitude in pursuing quality and continuous improvement, more educated stakeholders with an opinion to share, improved decision-making capabilities, a desire for more knowledge and less information, reduced volunteer time available, and a need to focus on performance indicators, increasing competency expectations, greater understanding of people and styles, and increased use of management tools such as benchmarking, etc. Most of these factors are connected to the application of technology.

Some key observations from students in the Certified Association Executive (CAE) Program and my findings are shared so thought can be given to some of the trends and issues and assessment of association relationships and changing expectations. This information may arrow you to identify situations and practices that will strengthen your relationships and reduce the chance of a particular situation might become disruptive.

Trends, issues and lessons learned

Volunteers

Relationships with volunteers are always changing. Changes in board and committee make-up occur on a regular basis. New people bring varying expectations and form different relationships. As boards change, association management needs to take a leadership role in ensuring that a common denominator of communication and decision-making expectations are established.

There is a growing fear among volunteers of personal liability, despite risk management initiatives and appropriate insurance. In some cases this may be used as a crutch/excuse for not becoming involved in the association's leadership. Reluctance to be involved with the association is growing and volunteer involvement is competing with many other activities.

Boards are starting to instill a culture of continuous improvement in associations. They are looking at what they do and how they can improve, they are no longer focused on maintaining the status quo. As a result, they are starting to realize their "due diligence" requires each board member have certain key competencies. More attention is being paid to the qualifications of individuals who are elected or appointed to boards as this will strengthen the capacity of associations and their potential to engage people who can support effective relationships.

Accountability is a key part of relationships reaching beyond an email message or an annual general meeting. Accountability efforts with links to plans and performance measures are on the increase.

With a greater understanding of "due diligence", continuous improvement and improved board competencies comes a shift from operational decision-making to policy decision-making. This is a stumbling block for some board members causing friction among directors and between traditional leaning directors and staff.

Clearer roles and responsibilities are resulting in the need for board member training to keep pace with the influx of information and requirements to support effective decision-making processes.

Many associations have stopped sending out the large agenda package. Agenda information is attached to an email or put on the website and is available as long as one has access to the intemet. Some are finding out that not everyone has a high-speed connection at home, a printer that can easily print 200 pages, or a laptop to bring to a meeting. As a result some board members seem less prepared than others. It is difficult to have an effective relationship when all those involved in the decision-making process have different levels of understanding.

Some board members bring their laptops and multi-task at meetings. Perhaps the chair should send them an email during the meeting asking them to pay attention. How can there be an effective relationship when a party is not listening?

Rules around decision-making are changing and different styles are being applied. There are expectations that decisions could be made faster. More information to support decision-making is available which in many cases is causing information overload.

Board and committee meetings used to have a good social component. Now it is all business. Attitudes are changing as volunteers are trying to manage their time and remain focused. While volunteers and members want some level of involvement or ownership, the sense of belonging should not be a waste of their time.

The internet and telephone conference calls have saved travel time and money but have reduced directors' feelings of being on a team. It is now more difficult to attract good board members. Face-to-face meetings generally were held in places where directors treated meeting attendance as a perk and stayed on for social purposes. It appears a number of individuals serving on boards want more personal relationships.

Staff

Boards expect the Chief Staff officer (CSO) to have knowledge and skills in all association management competency areas regardless of how much experience they have. In addition, they are required to be on top of technological changes and their applications in an association environment.

It is expected that associations will have the latest in technology to support members access needs, improve productivity and support decision-making in a timely manner. Having a technology audit and technology plan, along with information from member surveys, will help associations stay on top of changing requirements, ensure compatibility and attract board support for ongoing investments.

Relationships with volunteers can be improved by sending emails that indicate in the subject line – this is a quick question, something needed by the end of the day, or end of the week. Providing options to

respond 'yes' or 'no' or select a choice from a list will make things easier for volunteers with limited time.

Some CSOs are not able to adjust to new governance arrangements and the accompanying roles, responsibilities and new relationships. This may be due to style preference, being unable to shift competencies, or a lack of required competencies. Relationship problems are one of several cited often reasons when turnover of the CSO occurs.

Members

There is a tendency for people to have higher expectations and lower tolerances because of what technology is able to accomplish. It is not uncommon for members working for an organization with a multi-million dollar budget and outstanding technology resources to expect similar technology performance from an association with three staff members and a $400,000 budget.

Increased communications with members can improve relationships, but it is important to understand it is not just about the frequency of communications. There is a need to focus on the quality and relevance of your messages. Members are aware that association websites have an abundance of information and may access this information on occasion. However, members their associations to better understand their needs, convert more information to knowledge, and deliver it to their desktop.

Associations need to provide support to members who may require help in the use of technology. Getting too far ahead of the pack may alienate the very members associations are committed to serving.

Going from one paper survey every two years to one online survey every quarter can pose problems if the survey is being sent to the same person each time. Members value that their opinion is respected but have limited tolerance for the number of surveys they receive. A protocol on survey development and distribution will improve relationships with members.

Other stakeholders

The internet enables associations to gain timely access to huge amounts of government information. It is possible to track issues and related stakeholder interest with ease. In dealing with governments it is expected that associations will be on top of issues and in some cases, ahead of the curve. Proactive positioning with insight into potential issues and possible solutions will strengthen the value of associations and their relationships with governments.

The size of the voice and how it is applied still has an effect on governments. Technology and access to information allow associations to look for other similar voices and communicate positions. Strategic alliances to build a relationship of multiple voices integrated into a common group on selective issues gains attention.

Suppliers to associations are able to look at the business activities of associations on websites and gain an appreciation for plans and activities. If suppliers can talk knowledgeably about the association's purposes and understand the issues and needs, they will impress association managers and relationships may develop.

Media are able to find out about associations from their websites. However, they need a concise source or link that will save them time. Specific writers/journalists with interest in the association's purpose and issues need to receive information of interest on a regular basis rather than only for the big stories. The feeding of information may slowly develop a relationship.

Measuring success

How does one know if relationships are successful? There are ways to obtain feedback and measure progress. Relationships with members are often measured by surveys on levels of satisfaction. Other relationship measures are part of performance management systems. These systems often involve board or committee evaluation and staff appraisal. Other relationships may be tied to performance indicators such as extent of recognition, levels of involvement, attendance or participation numbers, etc. Taking steps to measure progress will identify opportunities for improvement.

Finding the balance

Depending on the stakeholders and relationship requirements, levels and type of activity need to be determined to ensure a proper balance between personal contact and non-personal contact is applied to ensure relationship expectations are met.
Individuals have different personalities and styles. They may have different generation exposures and may look for different balances between personal contact and non-personal contact.

A spreadsheet listing key stakeholder groups and individuals could be set up. The spreadsheet may indicate when personal contact should occur. For example, personal contact may occur to talk about personal matters, contracts over $25,000, new policy, etc. In any event, the spreadsheet should incorporate a practice to have personal contact occur on a regular basis. Association managers may plan to call a committee chair before and after a meeting. Phone calls could discuss substantive issues such as the agenda and action plans arising out of the meeting. This activity, of course, may be in addition to dozens of emails on more routine matters. The spreadsheet should also list other pertinent information necessary to manage the relationship.

General observations

Whenever provincial and federal governments engage in sabre-rattling there is a tendency for affiliates, chapters, divisions, etc. to start talking about responsibility and control issues. Relationships get tense as though they are mirroring what governments are doing. This type of activity diverts associations away from serving members. Having clear agreements, supportive orientation, and common strategic intent can help minimize disruption in these types of situations.

Access to information is becoming easier and cheaper. There is an assumption and expectation that those involved in association relationships are unaffected by a digital divide and have the same attitude toward keeping information moving whether at work, home or play.

Some seek a lifestyle balance between work and home, others seem to have fused the two as they check their work email before they go to bed. The "must do it NOW" individuals will no doubt have conflicts in relationships with those maintaining a balance in lifestyles.

The number of Canadians unable or unwilling to use technology at the same level as "must do it NOW' decision makers is still fairly significant. Just because members have an email address does not mean they have a "computer driving license" or wish to engage in communications using email or the Internet. What are associations doing about those non-members who have not joined because they do not have an email address or have failed their "computer driving license"?

While there is a group unwilling to totally embrace the use of technology, a different group of early adopters wants all the latest possible applications put in place even if they are not cost effective or applicable to the technology capacity of the membership. Yes, it is possible to have a Web broadcast board meeting with members invited to attend. However, if only 20 percent of members can take part, what message does this send to the other members?

Technology has its place but it needs to be used in tandem with personal contact. It should be noted that one finding which is loud and clear from CAE program participants is that personal contact needs to continue and technology should be used to enhance relationships. It should not be overly relied upon as the only way to support relationships. Leave the important work face-to-face meetings.

One technology savy association has recently decided to eliminate its voice mail system so members can now talk directly with a person in its office. This is apparently really appreciated by members. The association realized it is in the member service business, even if it costs a few hundred dollars more a year. I wonder what the response rate would be to a survey question that asked members if they would rather talk to a machine or a person?

In a short span of a decade the importance of human interaction in real time has been minimized and replaced with one-way conversations in alternating time zones. Lets not forget about the business we are in and the value of personal contact.

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