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# Leading Strategic Change in Associations

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A Strategic White Paper for the Association Industry

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## Letter from the President

Transforming your association to be successful is a priority for many associations. Association Laboratory helps trade and professional associations with this transformation through environmental scanning, market research and strategic planning.

The company is nationally recognized for its expertise and thought leadership in association research and strategy, serving a client base of leading state, national and global professional, trade and credentialing organizations through staff in Chicago, IL, and Washington, DC.

### **Association Laboratory provides your association with a unique value proposition:**

#### Full Service, Sophisticated Research

You receive objective, in-depth qualitative investigation linked to empirically-validated data using the most sophisticated research techniques in the industry to inform your decisions. Customized research methodologies that incorporate leading techniques result in better data to inform your decisions.

#### Passionate, Experienced Professionals

You work with association executives and corporate researchers with decades of practical experience providing you with real world insights and ideas. Practical insights mean workable solutions for your association.

#### Collaborative, Outcomes-based Engagements

Your engagement is designed around you and your desired goals so that the learning from the research and discussions resides in your association. By developing informed, consensus-driven decisions, you ensure that you and your leadership move forward together.

I hope this report provides you with information helping you lead your association more effectively. If we can ever be of assistance, never hesitate to contact us.

We look forward to working with you.

A handwritten signature in black ink that reads "Dean West". The signature is written in a cursive, flowing style.

Dean West  
President and Founder

## Framing Strategic Change

### Introduction

Today's association leaders are facing a time of unprecedented challenges where the organizations we serve will undergo substantial, and in some instances, radical change. Consider the following:

- **Demographics** - Many current associations are structured to serve the professional and industry needs of the Baby Boom generation. As members of this generation retire, associations will need to adapt to the needs of the X, Millennial and post-Millennial generations.
- **Technology** - Technological forces have created a complex, dynamic environment with continuous information that is disrupting the traditional information value chain; this disruption has irrevocably changed the business model for information delivery that has been underpinning associations for years.
- **Economics** - The recent Great Recession of 2008 highlighted weaknesses in marketing, programs/services, and governance that will need to be addressed if associations are going to continue to be viable entities.
- **Competition** – Reduced barriers to market entry caused by communications technology, and increased activity by for-profit organizations entering traditional association spheres of influence (such as publishing), have increased the speed, intensity, and complexity of the association competitive environment.
- **Globalization** – Associations operate in a global system where activity by organizations worldwide will have an influence on association strategy; this activity creates threats and opportunities.

Every association executive will be faced with the reality of leading or participating in strategic change at an association. The ability to successfully diagnose and lead strategic change is thus an essential competency for association leaders.

This white paper, developed [based on the input of some of the nation's leading trade association and professional society chief staff officers](#), will help association executives diagnose the reasons for strategic change, provide ideas on the success factors necessary for successfully leading strategic change, and identify the barriers to strategic change in associations.

## What is strategic change?

Not all change is strategic.

Strategic change is essential to the association's survival or the long-term, sustainable advancement of the Mission. It may require, and is more deserving of, substantially more time and resources than other types of change.

The process for strategic change requires greater participation from a more diverse range of industry and professional leaders, volunteers, and staff.

The following highlights key characteristics of strategic change:

- Strategic change is future focused and involves identifying and leading the association to be successful at a future point in time.
- Strategic change has a substantial impact on the fundamental aspects of an association's existence and its ability to successfully, and sustainably, achieve its Mission.
- Strategic change requires balancing the demands of current stakeholders with the anticipated demands of these (or different) stakeholders.
- Strategic change is enterprise wide, impacting the association's culture, product/service portfolio, and governance. It is comprehensive and robust in nature.
- Strategic change manifests itself over a longer time period, crossing budget years and governance cycles.

Leading business author Peter Drucker once said, **"The best way to predict your future is to create it."**

Developing the competency to lead strategic change gives association leaders the ability to create the future for themselves and the associations they serve.

"Strategic change is altering the course of the organization based on pursuing a consequential opportunity (or reacting to a threat) that is precedent setting, has great potential consequences for risk or failure, and/or requires a high magnitude of resources, and is on Mission."

Mark Engle, CAE, FASAE  
Principal  
Association Management Center

## What makes strategic change a necessity?

Strategic change may be necessitated by any combination of *external causes*, *internal causes*, or *future-focused gaps*. The following briefly describe key characteristics of these causes:

- **External Causation** – strategic change may be required because of changing external forces such as *industry shifts*, *competitive pressures* or *changes in market needs*. These opportunities or threats are precedent setting, have great potential consequences, and/or require a high magnitude of resources.
- **Internal Causation** - strategic change may be required as a result of substantial internal forces, such as *poor business performance* or *senior staff turnover*.

*External* and *internal* causes create gaps between the current association and the association that needs to exist to be successful in some future state.

The following are common gaps that necessitate strategic change:

- **Market/Stakeholder Gap** – The nature of the audiences served by the association are changing and this creates a substantial difference between who is currently served relative to who the association anticipates serving.
- **Strategy Gap** – As the Mission-based priorities of the association change, strategies also change. Strategic change is necessitated by substantial gaps between current and anticipated future strategy.
- **Product/Service Portfolio Gap** – The needs of audiences as reflected by their choice of products or services change so there may exist a substantial difference between the current and anticipated future product/service portfolio.
- **Governance Gap** – A dynamic external environment and corresponding strategies may create a gap between how the governance structure is currently organized to make decisions vs. the type of governance needed to make decisions in the future.
- **Operational Gap** – As markets, strategies, and the related product/service portfolio change, the association's operational structure needed to service these areas also changes. This creates a gap between how operations are currently structured and how they will need to be structured in the future.
- **Competency Gap** – As the strategies of the association change it often requires different skill sets. This creates a substantial gap between current competencies and required future competencies.

- **Cultural Gap** – As the association changes direction, it often becomes necessary for the culture of the association to change: for example, global vs. national or collaborative vs. hierarchical. This creates a gap between the current vs. future organizational culture.

Diagnosing the nature of strategic change requires developing systems to monitor and discuss these causes in an objective, thoughtful manner and assess which of the identified gaps is most important to address.

## Diagnosing Strategic Change

Ongoing systems to monitor and identify potential causes necessitating strategic change are essential to leading strategic change. Without these systems, a successful strategic change initiative is more difficult.

“It is virtually impossible during a change initiative to know what problems will be encountered and what will be the ultimate impact on the organization. The apparent inability to assess the nature of these difficulties before they emerge is a reason why organizational change initiatives are so often unsuccessful.”

Based on: Pearce, J. L. (2010). “Understanding Cultures” in *Organizational Behavior Real Research for Real Managers 3rd Edition*. Irvine, California, Melvin & Leigh, Publishers, Location 160, 167

The following describes common causes of problems necessitating strategic change and introduces methods for identifying these causes.

## Internal Performance

### Declining Association Performance

A substantial **decline** in the business performance of the association’s product/service portfolio over time is evidence of the need for strategic change.

The program/service portfolio is the sum of all association programs, services, product lines, and initiatives.

“Too often the indicators are not sufficiently evaluated regarding impact to the organization, which in turn leads to drastic course correction. This often disenfranchises various stakeholders and creates doubt or lack of trust.”

Abe Eshkenazi, CAE, FASAE  
Chief Executive Officer  
APICS

If a single program’s business performance is **declining** while other programs are improving, it is logical to assume that only this program faces challenges.

If a substantial number of key programs, services, or initiatives (or if a critical strategic program, for example, the annual conference/tradeshaw) is **declining**, this represents a substantial failure of the association’s value proposition in support of the Mission.

## Plateaued Association Performance

The **inability** of the association to substantially improve the overall business performance of its program/service portfolio in support of the Mission is evidence of the need for strategic change.

The business environment within which associations operate is constantly changing. When the association finds it has plateaued this may be evidence that current strategies have peaked and may no longer be sufficient to *improve* the business outcomes essential to the achievement of the Mission.

## Diagnosing Internal Performance Issues

The most effective means of determining the internal causes for strategic change is to review historical performance. **Performance data does not lie.**

A performance assessment has the following goals:

1. It is objective – the results should be indisputable.
2. It is longitudinal – the results should assess performance over time.
3. It is comprehensive – the results should address the entirety of the association’s activity.

The following describes a simple process for evaluating the association’s performance and indicating the future direction necessary to address areas of concern:

1. Collect financial and participation data for primary programs, services, and initiatives for the past 5 years.
2. Enter this information into a table or spreadsheet.
3. Review the data and identify whether or not the performance trend is increasing, decreasing, or flat.
4. Convene a staff meeting and discuss the meaning of trends in the data and potential next steps to address areas of concern.

By answering “**Decreased**” or “**Flat**” you have identified an area that is trending down and merits closer attention to identify the root of the problem. By answering “**Increased**” you have identified an area of success.

“Our association watches 6 metrics consistently that tell us the overall health of the association, our ability to fund our budget, the engagement of our members in programs, do we have the right balance of dues vs. non-dues [revenue] and on our return on management effectiveness. These metrics quantitatively tell us when we need to make any strategic shifts.”

Tom Morrison  
Chief Executive Officer  
Metal Treating Institute

Areas of success should be evaluated to identify the reasons for success so they can be applied throughout the organization. Common areas of investigation are the following:

- Membership (all categories)
- Conferences and events including exhibits
- Distance education or information such as webinars or teleconferences
- Publications
- Sponsorship Product sales such as books or videotapes
- Volunteer participation
- Government affairs (PAC contributions, volunteer activity, etc.)
- Component activity (e.g., regional chapters, special interest groups, committees, etc.)

By identifying and monitoring changes over time in each critical area, the association creates a performance index identifying the success of each area, its success relative to other programs and how the overall portfolio of products and service is performing over time.

**RESOURCE:** A simple evidence-based association evaluation template is located at [www.associationlaboratory.com](http://www.associationlaboratory.com).

## External Effects

No association operates in a vacuum. The external environment surrounding associations is constantly changing and these changes impact the potential success of the association. The following highlights some of the most common external effects necessitating strategic change.

### Changing Industry or Professional Market Structure

The changing structure of the association's industry or professional market is evidence of the need for strategic change.

"I look for any disconnect between how the industry defines itself and its challenges and the focus and culture of the association."

Julie Coons, CAE  
President and Chief Executive Officer  
Electronic Retailing Federation

Many industries and professions are changing. For many trade associations, consolidation is creating a different market structure as small companies are purchased and the association now serves larger, wealthier organizations with different needs.

Many professional associations are seeing the traditional roles or responsibilities of their members shift as employers restructure or need different skills.

### Government Action

Substantial changes in the regulatory or compliance environment that directly impact fundamental business assumptions within an industry or profession are evidence of the necessity of strategic change.

The impact on the marketplace of a comprehensive change in regulations may be so critical to members' business models or practices as to force change on the association. Conversely, the need for a regulation may provide an opportunity through which an association can influence its market. Taking advantage of this opportunity may require substantial change in how the association operates.

### Competitive Action

The entry of a substantially different or powerful competitor into the marketplace is evidence of the necessity of strategic change.

Competitors seek out opportunity. The entry by a competitor into a market is evidence that opportunities exist within that market. Participants in a market react to this new competitor because they now have a point of comparison to the association and other providers. If the association does not compare favorably, business outcomes suffer; strategic change to improve performance relative to this competitor is necessary.

## Technological Change

The introduction of new technology that has a substantial impact on the business model of association members' employers or the profession in which individual members work is evidence of the necessity of strategic change.

New technologies can be disruptive to markets, customer or member behaviors, and organizational business models. Understanding the implications of technological change is essential to leading strategic change.

## Diagnosing External Effects with Environmental Scanning

External effects are best diagnosed using a process of external environmental scanning.

Environmental scanning is a process designed to identify, monitor, and discuss anticipated changes in the macro, industry, professional, or personal landscape facing the association and its stakeholders.

Environmental scanning can be accomplished in a variety of ways but often includes some of the following characteristics:

- Identification of leading environmental factors of the external environment with the greatest relevance to the association, its Mission, strategies, and stakeholders. Include an in-depth discussion of the environmental factors to develop a common understanding of their meaning.
- Development and management of a continual process for tracking changes in the identified factors with a special emphasis on “trip wires” that would have the most impact.
- Ongoing dialogue regarding the implications of the environmental factors, addition/deletion of new factors, and the inclusion of diverse, alternative voices to improve the understanding and context of the discussions.
- Mechanisms to incorporate conclusions from environmental scanning into leadership discussions and decision making, and into the implementation of association strategy.

“The world changes quickly and associations are inherently built for stability and slow evolution via consensus-based decision making. In order to not be outpaced by the world, strategy and strategic change must be an ongoing process rather than a periodic event.”

David Gammel, CAE  
Executive Director  
Entomological Society of America

**A description of Association Laboratory’s model for strategic planning is located in [Appendix 1](#).**

## Creating Successful Strategic Change

Based on research conducted with association chief staff officers, the following summarizes key success factors necessary for the successful leadership of strategic change in associations.

### Monitor Potential Causes of Strategic Change

Creating and managing processes to continually monitor potential *internal* and *external causes of change* and to assess *gaps* between current and future needs are essential to successfully leading strategic change.

Since the activities of the association and the environment within which these activities take place is constantly changing, the association needs to develop systems to monitor environmental change.

Key steps in developing these systems are the following:

1. Create an association-wide business plan for the collection, analysis, and distribution of critical information to staff and volunteer decision makers.
2. Integrate both internal and external information for insight into potential opportunities or threats relative to the association's Mission and goals.
3. Create a dashboard for ongoing access to information by individual decision makers.
4. Provide for objective, independent review of information.
5. Incorporate the knowledge and decisions based on the review as a basis for governance work plans and annual operational planning.

By creating and maintaining a system to monitor potential causes of change the chief staff officer creates a leadership climate and board relationship that treats changes in key measures as news, not as evidence of poor performance.

The association must incorporate monitoring the external environment into its cultural DNA and be prepared to take appropriate action before an issue becomes a major challenge.

“Conduct regular environmental scanning of the forces driving change. Take time to think and to discuss the mega issues affecting the industry and what they mean for the association.”

Mike Mabry  
Executive Director  
Radiological Business Management Association

**RESOURCE:** A white paper titled *Implementing an Enterprise Wide Research Strategy* can be found at [www.associationlaboratory.com](http://www.associationlaboratory.com).

## Prepare the Association for Change

Laying the ground work for change, particularly with staff and volunteer leaders, is essential to successfully leading strategic change.

“Pay attention to the cultural/historical legacy and reaffirming the value and worth of what came before. Tell the story about why a change is needed over and over and over again.”

Mark Golden  
Executive Director, CAE, FASAE  
National Society of Professional Engineers

Individuals need to be *emotionally* and *intellectually* prepared to change.

Any strategic change effort must incorporate both aspects. Otherwise, participants may become resistant to change because they are being asked to do something different.

Potential tools for preparing staff and volunteers for change include the following:

- *Conduct staff discussions or personal interviews.* Convene informal staff or leadership meetings or conduct personal one on one interviews to investigate the feelings of the staff and their perceptions of problems, opportunities, and perceptions of potential changes for the association.
- *Show and discuss key performance trends.* Create a historical pattern of communicating and discussing changes in key performance metrics over time and lead a discussion of the implications with staff and volunteer leaders.
- *Formally incorporate change discussions into governance.* Establish distinct points to discuss the future of the association given its performance or changes in the environment with your staff and volunteer leaders. For example, reserve time at each board of directors meeting to discuss the implications of changing trends on the future of the association.
- *Listen to your own process.* If the metrics you track or the discussions regarding a future state necessitate change, initiate action so that the process of monitoring and reacting to internal causes and external effects is reinforced and becomes part of the culture of the association.

“If the board is not sufficiently apprised on an ongoing basis about the changing environment – this discussion [change] could be a real shock to the system. This is perhaps the most important part of the change effort.”

Abe Eshkenazi, CAE, FASAE  
Chief Executive Officer  
APICS

Properly preparing the ground for discussion regarding potential change helps association leaders identify potential areas of concern that will need to be addressed through the strategic change process.

**The goal of these activities is to make staff and volunteer leaders comfortable with discussions about the future and if changes are necessary to be successful.**

## Communicating the Rationale for Change

Successfully framing the issues and communicating the rationale for change to staff and volunteer leadership is essential to leading strategic change.

Successful strategic change involves properly diagnosing then communicating the reasons for change to association leadership. This requires a properly formulated *rationale for change*. This rationale requires objectivity, transparency, and consensus among key decision makers on the problems and their implications on the future of the association.

“To the extent possible, ground decision making in evidence-based data. Provide complete analysis of the issues and/or trends, soliciting broad based input and then providing a forum for discussion and consensus building.”

Charles MacFarlane, CAE  
Chief Executive Officer  
American Association of Diabetes  
Educators

A successful rationale for change may include some of the following:

- **Objectivity** – *Use objective data*. Subjectivity is the **enemy** of change. The more objective data you can use to frame the issues and describe the necessity for change, the more likely you are to succeed.
- **Transparency** – *Be transparent*. If participants believe that they do not have the complete picture or perceive the leader as “holding back” important information, it becomes more difficult to lead strategic change.
- **Definitions** – *Clarify the definitions of key terms and concepts*. People often have different ideas of what the same term means. Make sure that you create understanding of what critical words and phrases mean in discussing issues important to strategic change; there needs to be a shared definition to move forward. For example, when you say “We need to improve ROI,” make sure there is a common idea of what ROI means.
- **Problem Description** - *Define the problem objectively*. A subjective, emotional appeal may result in others resisting change because they disagree not with the problem, but with how it is communicated. One person’s crisis is another person’s mild concern. Do not let the message or the messenger overshadow the problem.

A good problem description links cause and effect. The problem description should explain the causes of the problem in context, the contributing factors to the problem, and the key points that can be addressed by the association.

Discuss the problem description with key stakeholders and refine the rationale until there is agreement.

- **Rationale for Change** – *Create a written Rationale for Change*. Describe the problem and a potential process for developing new strategies to address the problem. This document forces leaders to articulate the issues and acts as a communication vehicle to help lead future dialog.
- **Urgency for Change** – *Create and sustain a sense of urgency*. The need for communicating a sense of urgency is critical to supporting change. People can easily revert to previous behaviors without the need for change being constantly reinforced.
- **Repetition** – *Sustain communication efforts over time*. The need for communicating the rationale and strategy for change never ends. New people enter the process and current participants forget key points. Constantly reinforce through your communications plan the change imperative.

Potential communication strategies to communicate the rationale include some of the following:

- Compare historical vs. potential business models to demonstrate how new models more successfully achieve the association’s goals.
- Identify future scenarios resulting from a continuation of trend data. How is the association’s situation worse or better should current trends continue?

When communicating the rationale for change, **do not underestimate** the emotional needs and response of stakeholders.

Many individuals will have invested substantial effort in developing and supporting the existing programs, services, and priorities. Be patient and take time to discuss the implications of change on everyone who may be affected.

“When discussing change, discuss alternatives. Prepare ‘what if’ scenarios: If our business doesn’t grow, what will happen to our organization?”

William Murray, CAE  
Chief Executive Officer  
Public Relations Society of America, Inc.

It is essential that the rationale validates their historical efforts and that communication strategies take the emotional response of participants into account.

## Stakeholder Identification and Recruitment

Successful identification and recruitment of association, industry, and professional opinion leaders is essential to successfully leading strategic change.

### Stakeholder Identification

Identifying key stakeholders is essential for successfully leading change.

An important success factor is determining which stakeholder groups and individuals need to be active in a strategic change initiative.

“By mapping stakeholders you gain more insights which are useful as background which of these stakeholders are friends or foes and where cooperation or alliance building may be feasible.”

Alfons Westgeest, FASAE  
Managing Partner  
Kellen Europe

One method of determining whom to invite is to compare their interest to their influence. For example, stakeholders can be grouped into four categories<sup>1</sup> based on their interest and their power to impact the association’s decisions.

The following two by two grid creates a framework for evaluating the **power** of stakeholders to influence strategic change efforts relative to their **interest** in participating in strategic change efforts.

*First* create a list of potential stakeholder groups. *Second*, place the name of each group in the box that you believe best describes the combination of their power and interest in strategic change. *Third*, discuss with your staff and volunteer leaders their opinions regarding the placement of each group and change accordingly based on their feedback. Do the same with individuals you believe are important to the process.

<b>Low</b> Power and <b>High</b> Interest Stakeholder Groups? Individuals?	<b>High</b> Power and <b>High</b> Interest Stakeholder Groups? Individuals?
<b>Low</b> Power and <b>Low</b> Interest Stakeholder Groups? Individuals?	<b>High</b> Power and <b>Low</b> Interest Stakeholder Groups? Individuals?

<sup>1</sup> ADE 6180, *Stakeholder Identification and Analysis Techniques*, Florida International University

By establishing a *power vs. interest* grid, and determining where key stakeholder groups or individuals are within this grid, association leaders can better determine which people and groups need to be incorporated into the strategic change initiative.

## **Stakeholder Recruitment**

Recruiting critical stakeholders is essential to leading strategic change.

Once the relative *interest* and *power* of key groups and individuals is identified, the association can begin to recruit people to participate in the change initiative.

Successful change requires an iterative approach to recruitment. Begin with a small group of essential participants and develop agreement on the rationale for change and the process for managing the change process before moving on to larger and more diverse groups for continued discussion.

For example, begin with key staff and volunteer leaders. Then, add in other association stakeholders who may have an impact on, and be interested in, the final strategic change outcomes. Finally, incorporate the ideas and opinions of more peripheral stakeholders.

Use the *Rationale for Change* as a communication document. Continually reconfirm the consensus on why change is necessary.

Successful recruitment requires some of the following:

- Identify individuals with an interest in change
- Communicate the preliminary rationale for change
- Be clear about their roles, responsibilities, and necessary time commitments
- Be clear about anticipated authority and supporting resources

Having the right people participate in the strategic change process is essential to success. As a result, spending sufficient time to properly recruit these individuals is critical.

## Collaborative Analysis & Decision Making Process

Developing and managing a collaborative process for analysis and decision making is essential to leading strategic change.

Collaborative analysis and decision making involves incorporating critical stakeholders into the design, discussion, and outcomes of the strategic change process. They become *participants in the process from the beginning* and develop their own conclusions and recommendations for change instead of simply receiving or validating the work of others.

Key tools in collaborative analysis and decision making are:

**Steering Committee** – a steering committee is formed made up of individuals who will be impacted by decisions and participating in the implementation of any change strategies. The goal is to have a group of 8 – 12 motivated staff, volunteer leaders, and potentially other key opinion leaders, representing diverse backgrounds and experiences who work together to refine the rationale for change and champion the strategic change process.

**Shared process design** – participants are co-creators of the process to investigate the causes requiring change, reviewing the outcomes of this investigation, coming to shared conclusions, and making recommendations.

**Process check points** – the process needs to have distinct checkpoints where the steering committee confirms their agreement on the process, its outcomes, and what additional work is necessary to inform decisions. These checkpoints allow the association to continually confirm consensus on the rationale for change and the process for leading change. They also allow participants ample time and opportunity to digest the information generated by the process and assimilate its meaning for decision making.

“Make constant adjustments along the way. It is more demanding on a day to day basis, but it is far easier to make small adjustments to account and correct for drift every day, rather than wait to see how far off course you got by continuing to travel ½ a degree off course for the last six months. “

Mark Golden, FASAE, CAE  
Executive Director  
National Society of Professional Engineers

**Objective Data** – conduct sufficient research to inform decisions that provide independent, objective data to inform decisions and track progress towards the strategic change goals. The sophistication of the research should match the requirements of the change process.

A collaborative analysis and decision making process helps participants deal with the volume and complexity of the information, creates more useful dialog, and results in key stakeholders believing they have a personal stake in the outcome of the strategic change process.

## Implementing the Strategic Change Initiative

“Change can be made for change’s sake, but it takes discipline to enact strategic change.”

Christie Tarantino, CAE, FASAE  
Executive Vice President  
Institute of Food Technologists

Successful strategic change requires a plan to support managerial discipline throughout implementation. Key considerations are the specific process for managing change, strategic communication plans, testing the viability of strategies, measuring success, and embedding change management competencies within the association.

## Developing a Process to Manage Change

Developing a formal process to manage change, adapting to real world results, and incorporating modifications into the existing operations of the association are essential to leading strategic change.

Strategic change requires a business process for disciplined, effective management.

The more the process of strategic change is removed or separate from existing management functions and business processes, the more it becomes an “outlier” within the association – something different and set apart.

Strategic change needs to be incorporated into the association similar to other key initiatives. Key steps include the following:

1. Identify the person responsible for leading the overall change effort and if necessary other individuals responsible for key aspects of individual change oriented strategies and provide them with the responsibility, authority, and resources consistent with their role.
2. Establish clear expectations regarding success so that all participants have a common understanding of what success will look like.
3. Establish goals to measure success and interim metrics to measure progress towards these goals.
4. Establish project schedules and use other management tools as needed consistent with existing association practices.

“Our board now plans strategically at every meeting: we use dashboard stoplight charts to mark progress and roadblocks, we recalibrate our strategic plan at each meeting, we recruit board members to fulfill critical pre-defined skill sets, and we openly deal with the good, bad and ugly without fear of reprisal as a board and staff.”

Glen Fine  
Executive Vice President  
Clinical and Laboratory Standards Institute

5. Incentivize successful change behaviors by highlighting the accomplishment of interim measures and rewarding staff and volunteers.

As with any association initiative, a formal change management implementation plan should be developed. This is different than the *Rationale for Change*. The change management plan is a business tool designed to help association leaders oversee the tasks related to new strategies identified through the strategic change process.

The association may incorporate performance measurement tools into this formal management plan to identify progress towards goals. Two common tools are [key performance indicators](#) (KPI) and the use of a [balanced score card](#) (BSC).

Creating a formal management plan, establishing a measurement structure, and rewarding successful change behaviors allows the association to gradually create and reinforce a positive culture towards change, making future adoption of strategy easier.

## Communication

Creating a compelling story communicating the rationale for and strategies driving change, and effectively communicating this story in a consistent, continual manner, is essential to successfully leading strategic change.

The goal of the communication plan is to clearly identify the rationale for change, the strategies for change, and the anticipated benefits of change to interested stakeholders. In addition, the plan acts as a means of guiding customized messages to specific stakeholder groups and informing stakeholders about progress towards strategic change goals.

Common characteristics of a change management communication plan include the following:

1. *Audience* – Who are you communicating to and how are different audiences similar or different in their perspectives or attitudes?
2. *Current Attitude* – What are the existing attitudes of key audiences regarding the rationale for change?
3. *Desired Behavior* – What do you want the target stakeholder groups to know or do once you have communicated the rationale for change?
4. *Key Messages* - What key messages would be most compelling for each stakeholder group?
5. *Timing* – When should messages be delivered and how often for each stakeholder group?
6. *Delivery* – What is the best method or combination of methods to deliver the message?
7. *Evaluation* – How will you monitor the success of your communication efforts?

Communication strategies should provide both objective and emotional appeals. Calls for change based on objective analysis supported by a compelling emotional story are more likely to be successful. In addition, communication strategies should convey a sense of urgency.

More information on developing a strategic communication plan can be found at the [International Association of Business Communicators](#).

## **Phase in and Test Strategy**

Implementing change in phases or steps and constantly testing ideas prior to full-fledged implementation to determine if and how well they succeed is essential to successfully leading strategic change.

Strategic change can be intimidating and overwhelming. By identifying and implementing change strategies in logical phases it is possible to reduce the overwhelming nature of strategic change and help people adjust mentally and emotionally to how the association will be different.

In addition, many associations are complex, sophisticated organizations. It is more difficult to implement organization-wide change in such organizations.

To address this, new strategies should be tested to see how well the assumptions upon which they are established hold up in the real world. Experimenting on a smaller scale provides lessons regarding the response to the strategy that can be used to set more realistic expectations.

An example of a test strategy would be to implement a potential idea with 2 – 5 geographic chapters instead of throughout the whole association to see what works and what does not. Learn lessons from these activities, modify the strategy, then implement throughout the association.

## **Measure and Modify Strategy**

Monitoring strategy success and making changes as needed is essential to successfully leading strategic change.

Strategic change is complex and comprehensive. During the transition from decision to implementation, leadership is often faced with unanticipated challenges or resistance to the strategic decisions made. To help address these issues a system of evaluation and strategy modification needs to be managed.

For example, leaders can organize a quarterly review of success to review the challenges to strategy implementation and incorporate advice, lessons, or other learning from implementation into potential solutions for the association.

Finally, revisit the assumptions behind the original problem diagnosis, the rationale for change, and the resulting strategies for change so that the underlying foundation for change is not in doubt.

## Embed Successful Change Management Competencies

Embedding the rationale and strategies for change within the association so that change strategies and competencies survive leadership turnover is essential to leading strategic change.

Successful change never stops because the association and the surrounding business environment are dynamic.

Embedding key change management processes and competencies within the association are essential to successfully sustaining strategic change.

Common tools for embedding change management competencies include the following:

- Incorporate and assess staff competencies related to strategic thinking and change management in position descriptions.
- Provide ongoing leadership training and board development related to change management.
- Provide updates regarding ongoing work, trends, and “sign posts” via regular communication briefings to staff and leadership.
- Discuss 1-2 generative topics at each board meeting without requiring a decision to orient volunteer leaders to ongoing discussions of strategic topics.
- Conduct and share an annual board self-assessment – include personal assessment worksheets with questions regarding how “you” can increase skills and competencies in key areas relative to diagnosing and leading change.
- Create opportunities for conversation, coaching, and mentoring (peer-to-peer, etc.) regarding the future of the association, its members, and what skills and attitudes will be necessary to prosper within the future environment.

By embedding change competencies and supporting business and governance processes, the association creates a network that can survive changes in leadership.

“Strategic change is neither quick nor easy. For change to be successful, an organization must remain focused on the change plan, set milestones, and adhere to the project plan. At the same time, an organization must be willing to make adjustments to the plan when new information becomes available, or when it appears as if initial assumptions are no longer valid.”

William Murray, CAE  
President and CEO  
National Coffee Association

## Identifying Barriers to Strategic Change

Cultural inertia, skills, attitudes, and misplaced rewards are **barriers** to successful strategic change.

### Culture of Complacency

Organizational cultures that support staff and volunteer leaders who are hesitant to, or incapable of, adapting to change are a **barrier** to successfully leading strategic change.

“I think the real issue is that the organization (meaning the people it is composed of) is not used to the organization changing much at all. They are not used to it, don’t understand the need for it, and thus resist it initially.”

David Gammel, CAE  
Executive Director  
Entomological Society of America

Volunteer leadership and staff can become complacent and comfortable with the status quo.

By not experiencing successful change they **lose the capacity, capability, and attitude necessary to lead or participate in change.**

There are three primary characteristics of a culture of complacency:

1. Historical performance of leadership
2. Legacy resistance
3. Rewards for bureaucracy

The following sections describe these three areas in more detail.

### Historical Performance of Leadership

Poor or inconsistent leadership is a **barrier** to successful strategic change.

Association executive leadership, in cooperation with volunteer leadership, must be honest in their self-assessment of their leadership performance. It is difficult to imagine a chief staff officer or executive team with a substantial history of poor performance successfully leading a change effort.

The chief staff officer in particular has a central role in leading an honest evaluation process and in determining the challenges created by their own leadership style.

Often, poor leadership creates a culture of complacency that is difficult to address.

Author Lisa Woods, President and CEO of [Managingamericans.com](http://Managingamericans.com), posited four reasons for organizational complacency. The following is an excerpt from her posting on a strategy blog.

1) Changes at Top

Leadership changes happen more often than employee changes do. When management changes, so do rules, expectations, projects, etc. [sic]. Employees get frustrated having to prove themselves again and again without any acknowledgement of past accomplishments. History fades when new management arrives. Pretty soon employees give up making new efforts because they realize that concealing themselves in a bubble of certainty is the only thing they have to maintain some control in their job and their livelihood. It is like putting a brick wall between themselves and change.

2) History of Bad Decisions

There has been a history of negative change in the company: layoffs, facility closings, poor leadership, and cronyism. Trust diminishes through these events and employees stop paying attention. They just want to get paid and go home because nothing they contribute matters.

3) Inconsistency from Management

Failed ideas, lack of follow-through on new programs, too many system workarounds to get things done, lots of meetings, reports and talk without any constructive action taken by management. Employees feel overworked and underutilized by inconsistency. By holding onto what they can control, they maintain some consistency.

4) Message Disconnect

The company's vision may be known within the management team but does not go any further. Employees don't embrace the new path because they don't know it, or don't understand it.

If your organization suffers from some or all of these issues, it will be necessary to invest in activities that build credibility and trust before initiating substantial change management activities.

Properly focusing on the causes of complacency allows you to identify specific strategies to begin building a culture more adaptable to change.

In addition, different industries, professions, and organizations have different cultures. Some industries, such as the technology industry, are more accustomed to change and, as a result, individuals active in these industries may be more ready to embrace change. Finally, organizations that have successfully gone through substantial successful change in the past are more likely to embrace future change.

To begin changing this culture of complacency, start small.

For example, identify a particular staff person or group and assign them a smaller task to accomplish. Monitor their progress and reward them appropriately for successful change. Gradually over time, they will build a comfort level and competency for change. Assign larger, more substantial projects and incorporate additional people until the desire for and ability to manage change becomes more prevalent in the organization.

## Legacy Resistance

The lack of alignment between staff and volunteer skills and their commitment to the status quo is a **barrier** to successful strategic change.

Staff and volunteer leaders may be uncomfortable with strategic change because their current skills **may not align** with future needs.

Change means learning new competencies or experimenting with activities in which they have less experience or knowledge. They have learned skills appropriate to the current activities of the association and have contributed to these activities' current success.

"The biggest barriers are people being close-minded, not willing to learn a new way, fear of failure and not being able to see negative trends before they are actually impacting the association."

Tom Morrison  
Chief Executive Officer  
Metal Treating Institute

In addition, strategic change will **reduce the association's ability to support the current desires** of some volunteers, staff, or members who are satisfied with the status quo. They will perceive a new direction as providing less of what they want.

It is possible to conclude that association staff in particular who have served with the association longest may have the most to fear from change since they would have invested the most in the current goals and directions of the association.

## Rewards for Bureaucracy

Cultures which have historically reinforced measures unrelated to Mission-based or business outcomes represent a barrier to strategic change.

Many association executives become accustomed to **measures of bureaucracy** as substitutes for success.

For example, it is common to mention the budget of the association or number of employees despite the fact that neither of these measures have a substantial relationship to the achievement of the Mission and may, in fact, hide critical business failings.

Would a person rather lead a \$5 million association losing \$500,000 per year or a \$3 million association netting \$500,000 per year? The smaller association is arguably more successful but some association executives would assign a higher status to the chief staff officer of the larger organization.

Identifying the number of staff is another marker that is not a measure of success. The number of staff is not consistent with capacity, capability, or the delivery of successful business or Mission-based outcomes; it is simply a number designed to communicate how many people a chief staff officer is responsible for managing.

**If the association reinforces behaviors that are not based on measurable Mission-based or business outcomes it is difficult to increase accountability or change the culture of complacency.**

## Lacking Sufficient Rationale for Change

The lack of a substantial rationale for strategic change is a barrier to leading strategic change. Common difficulties in forming this rationale include poor information and decision prioritization.

### Lack of Objective, Quality Information to Inform Decisions

The lack of quality information to diagnose the association's problems, develop the rationale for change, or inform decisions on strategy and implementation is a **barrier** to successfully leading strategic change.

Research is the planning, collection, and analysis of data relevant to decision making, and the communication of the results of this analysis to management and volunteer leaders. Marketing research fulfills three functional roles: descriptive, diagnostic, and predictive.

- The *descriptive* function includes gathering and presenting statements of fact.
- The *diagnostic* function helps explain the actions of a particular target market.
- With the *predictive* function, the association answers questions allowing them to address future opportunities or threats in the ever-changing marketplace.

A good market research study helps the association balance these three areas to provide the highest quality and most useful information for decision making within the staff and financial parameters of the organization. The optimal market research process incorporates several different methodologies designed to balance the strengths and weaknesses of each method with the resources of the association. A specific market research methodology balances the following:

1. Data quality
2. Direct costs
3. Professional fees (if conducted independently)
4. Timeframe

The methodology should take an approach that is replicable, manageable, and as economical as possible given the research objectives.

**RESOURCE:** A white paper titled *Critical Analysis of Common Research Challenges* can be found at [www.associationlaboratory.com](http://www.associationlaboratory.com).

## Problem/Solution Diagnosis and Prioritization

The inability to properly diagnose and prioritize the association's challenges or the strategies to address these challenges is a **barrier** to successfully leading strategic change.

You can do anything you want, just not everything you want.

To properly guide staff, volunteer, and financial and operational resources requires focus. Associations that cannot decide on their challenges, strategies, or focus resources on activities essential to implementation are less likely to succeed.

Common methods of prioritization include the following:

- *People Served* – select the problem or solution that impacts the largest number of people.
- *Revenue* – select the problem or solution that impacts the line items representing the most gross or net revenue.
- *Expense* – select the problem or solution that impacts the largest expense line items or requires the most staff resources.
- *Mission Alignment* – select the problem or solution that aligns most closely with Mission-specific goals.
- *Value Proposition* – select the problem or solution that most directly impacts the member or customer value proposition.

By assessing the performance of key association programs, services, or initiatives against some or all of these measures, the association can more effectively identify which association priorities should be expanded, reduced, or eliminated.

## Governance Structure and Commitment

A governance structure that **does not provide** for efficient, effective decision making is a **barrier** to successfully leading strategic change.

Strategic change by definition deals with a critical challenge and has a substantial impact on the association. Often, the association's governance cannot make the decisions necessary within an adequate timeframe to address the challenges required for strategic change.

This is often a result of legacy governance systems designed to **address historical goals that are no longer relevant or required to be successful**. For example, the legacy system may be designed to be representative in nature, providing a guaranteed voice for a group of members that no longer are important to the future of the association.

The [Association Forum of Chicagoland Professional Practice Statement on Governance](#) introduces the following reason for the existence of a well thought-out governance process:

*Association governance exists to identify and achieve the organizational mission, goals and strategic outcomes. Associations are most successful when they are driven by strategic plans that clearly define expected end-results (outcomes), using a governance structure that is sufficiently plan-focused, flexible, and depoliticized to produce those results.<sup>2</sup>*

The ability of your governance model to quickly make informed decisions is critical.

A modern governance system is designed to make the most effective decisions possible for the association. Common goals of an association when considering changes to governance should include the following:

- **Fast Decision Making** - Create a streamlined, transparent, and objective governance model that makes decisions within the necessary time frame.
- **Diverse Stakeholder Management** - Create a governance structure that allows the association to successfully incorporate attitudes of and serve multiple and changing constituencies.
- **Staff Leadership** - Sustain a culture of staff leadership to improve the association's program/service continuity and provide for oversight of association initiatives.

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<sup>2</sup> Association Forum of Chicagoland Professional Practice Statement on Strategic Governance

## Leading Strategic Change

- *Strategic Focus* - Reduce the level of Board interaction in program execution, and focus Board efforts on policy creation, association oversight, and as stewards of the association.
- *Efficiency* - Streamline governance by reducing the size and/or number of decision-making bodies and by creating more linear decision-making processes.
- *Clarity* - Create a clear definition of roles and responsibilities between volunteer leadership and staff.
- *Future Direction* - Create clear policies designed to secure the financial and operational prosperity of the association as an organization for future members, volunteer leaders, and staff.
- *Predictability* - Create a clear path for leadership ascension which assures that volunteer leaders are adequately prepared to assume their position as stewards of the association.

A simple survey using the following questions distributed among volunteer leadership would provide association leaders with an initial assessment of the governance models performance.

Ask each volunteer how well the existing governance system achieves each of the goals and discuss how or why not to identify the most pressing problems and potential solutions.

As part of the strategic change initiative, a gap analysis may also be useful. To create a governance gap analysis an association answers the following questions:

1. *Future Vision* - What is the anticipated future of the association given its Mission, markets, goals, and strategies?
2. *Required Governance* - What model of governance would be optimal given this anticipated future?
3. *Current/Future Governance Gap* - How does this optimal model compare to the current model?
4. *Transition* - What steps does the association need to take to modify the current model to more closely fit the optimal model required in the future?

**RESOURCE:** The [Association Forum of Chicagoland](#) has produced several Professional Practice Statements on governance. They provide substantial executive level guidance on a variety of governance topics.

## Business Model Gaps

Differences between the *current* association business model, staff competency, and resources, and the model, competency, and resources *required* is a **barrier** to successfully leading strategic change.

## Organizational Structure

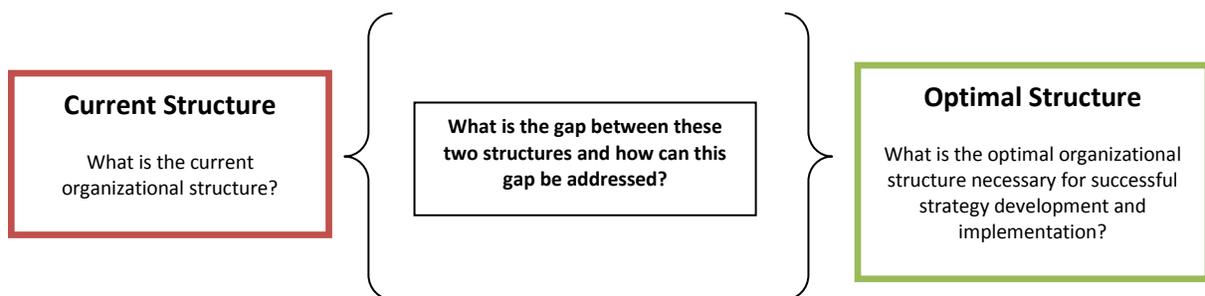
Substantial gaps between the current organizational structure and that required to implement necessary future strategies is a **barrier** to successfully leading strategic change.

The goal of the association operational structure is to align human and operational resources with the needs of the market and which reflect the association’s strategic priorities and corresponding strategies.

Too often, association structures evolve organically over time to address changing organizational priorities. This results in a “Christmas Tree” effect.

Each new strategy and its related program or service is simply added to the “tree” like a new Christmas ornament. Nothing is removed and the basic structure of the association is not modified.

The form of the association should follow its strategic function. The association’s operational structure as reflected in human and operational assets must be optimized for strategy implementation.



The goal is to link future member and market needs to strategy to necessary organizational structure and resource investment. By creating an association structure that is optimal to the development and execution of strategy the association can successfully implement strategic change.

While many different business models are successful, the modern association human and operational structure will achieve the following:

1. Flexibility of capability
2. Flexibility of capacity

The more static the association's operational structure, the **less ability** the association has to adapt to a changing environment. The more dynamic the association's environment, the more a **static** model limits the association's success.

## Organizational Competency

The lack of sufficient staff business competency is a **barrier** to leading successful strategic change.

Pursuing new strategies often requires different skills. The less the similarity between a new strategy and a current strategy, the **less likely** that existing staff have the necessary business skills and competencies to be successful.

For example, a national association, upon deciding to expand globally, discovered that their staff did not have sufficient global management competencies. To adapt, different staff needed to be recruited for key positions.

Review the historical performance of the staff team objectively and honestly to assess their capabilities. Teams develop over time to be successful achieving different things. If members of the team were brought in to monitor or make minor course corrections over a long period of time, it is unlikely they will have substantial competency as change agents.

"We all need to create a mindset in our leadership teams that constant change is part of our reality and incorporate strategic planning into everyday business."

Henry Chamberlain, FASAE, CAE  
President and CEO  
Building Owners and Managers Association

Two paths to improving competency are internal development and external recruiting.

- *Internal development* - Individuals with a positive attitude towards the direction of strategic change are encouraged and supported through professional education and training and through compensation policies.
- *External recruiting/partnering* - The association identifies and recruits new staff or establishes relationships with strategic vendors or partners with the requisite skill set.

Successful strategic change requires determining how the current competencies of the organization are different from those necessary for success within the anticipated future environment given the goals and strategies of the association.

## Organizational Resources

Identifying and sustaining sufficient financial and staff resources is a **barrier** to successfully leading strategic change.

Often, the rationale for strategic change is beyond the immediate resources of the association.

Limitations in two types of resources act as barriers:

- *Financial resources* – How much money does the association have to invest in and sustain strategic change while maintaining essential programs, services, and initiatives?
- *Staff capacity* – How much available time does staff and volunteer leaders have to commit to and sustain new initiatives critical to strategic change?

Financial resources can be expanded via new sources or by concentrating existing sources.

“One of the biggest challenges is resources – maintaining existing revenue streams while expanding into new; figuring out how to abandon ‘some’ money to chase potential ‘more’ money from other sources.”

Erin Fuller, FASAE, CAE  
President  
Coulter

*New Sources* - The rationale for change, if properly communicated, can be a useful tool for gaining **additional financial support** via commercial partners, members, or other stakeholders. By communicating the value of the future of the association, you justify the additional financial support from stakeholders that stand to directly benefit.

*Resource Concentration* – The association often has a variety of legacy programs that are no longer essential to meeting either the current or future needs of members. Financial resources (and staff capacity) used for these programs dilutes resources. By **eliminating or reducing legacy programs** no longer considered valuable, the association frees resources for investment in new programs, services, or initiatives more essential to the future of the association.

Staff capacity is another common **barrier** to successful change.

The current workload of staff is not decreased simply because the association has chosen to go in another direction. To be successful, the association needs to build the capacity to initiate and sustain change management activities. Common strategies include the following:

*Staff Expansion* – Using new funding sources or resource concentration, sufficient financial resources are identified to hire new staff with the requisite competencies.

*Staff Realignment* – Restructure existing staff to improve utilization of their existing capacity and competency.

*Staff Extenders* – Identify and engage subcontractors with required skills to directly service change related initiatives or to free current staff from current activities so they can focus on new initiatives.

*Strategic Prioritization* – Objectively review exiting programs, products, and services to reduce or eliminate those that are no longer in alignment with the future goals of the association.

*Strategic Outsourcing* – Engage a substantial organization to provide turnkey solutions to the association that free staff to concentrate on change initiatives. For example, contract with a meeting company for meeting planning, or an association management company for accounting or for supporting activities in other geographies where a local presence is essential to achieving the global goals of the organization.

*Strategic Partnerships* – Identify other associations that are in alignment with the future association vision and work with these organizations as partners to develop new initiatives.

## Closing

Association leaders have seldom been faced with such an exciting time.

Associations are operating in a time of dramatic change where markets, members, and staff are all impacted by economic change, technological disruption, demographic changes, and globalization.

These changes create substantial challenges that require association leaders to develop and model new competencies. The successful initiation, implementation, and management of strategic change will be one of these essential competencies.

Today's association leaders represent the managerial generation that will transform associations designed to serve stakeholders in the 20<sup>th</sup> Century into organizations that will enjoy long term sustainable success in support of the Mission in the 21<sup>st</sup> Century.

It has been my pleasure to work with such a distinguished group of association chief staff officers to identify and articulate how modern associations can begin creating more successful organizations.

A handwritten signature in black ink that reads "Dean West". The signature is written in a cursive, flowing style.

President  
Association Laboratory Inc.

## Appendix 1: Methodology

To develop *Leading Strategic Change in Associations*, Association Laboratory conducted the following research activities and analysis:

1. Development of qualitative worksheet for initial data collection.

Association Laboratory developed a worksheet to collect initial feedback from a select group of association chief staff officers representing trade and professional associations. The questions asked on the worksheet were the following.

- How do you define strategic change?
- How do you diagnose the need for strategic change?
- How do you prepare for strategic change?
- What are the most substantial barriers to strategic change?
- What are success factors for implementing strategic change?
- What advice or comments do you have regarding strategic change?

2. A modified [Delphi](#) review process was used to create the final white paper.

The comments, ideas, and suggestions of the chief staff officers were consolidated and used to develop the initial first draft of *Leading Strategic Change in Associations*.

A first draft of *Leading Strategic Change in Associations* was distributed to the chief staff officers for additional review. The draft was also distributed to an expanded list of chief staff officers who had not participated in the initial worksheet stage. All comments were incorporated into a second draft.

The second draft was distributed to all participants for final comments.

**Twenty-five chief staff officers participated in this project.**

3. Association Laboratory inserted supporting commentary, quotes, secondary research sources, and primary research from relevant studies to support specific points.

## Appendix 2: Contributing Authors

Association Laboratory would like to thank the following association leaders for their contributions to this white paper.

Erin Fuller, FASAE, CAE	President	Coulter
Christie Tarantino, FASAE, CAE	Executive Vice President	Institute of Food Technologies
David Gammel, CAE	Executive Director	Entomological Society of America
Mark Golden, FASAE, CAE	Executive Director	National Society of Professional Engineers
Paula Rieger, CAE	Chief Executive Officer	Oncology Nursing Society
Tom Morrison	Chief Executive Officer	Metal Treating Institute
Henry Chamberlain, FASAE, CAE	President and CEO	Building Owners and Managers Association
Julie Coons, CAE	Executive Director	Electronic Retailing Federation
Dan Borschke, FASAE, CAE	Executive Vice President	National Association of Concessionaires
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## Appendix 3: About Association Laboratory

### Principal Author

**The principal author of this white paper is Dean A. West, President.**

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Dean West is one of the nation's most recognized experts on association strategy. He is a former association CEO and has served as Chairman of the ASAE Professional Development Council and as a member of the ASAE Membership Council. He is also a former member of the Board of Directors of the Association Forum of Chicagoland.

### About Association Laboratory

**Association Laboratory helps association leaders make better business strategy decisions.**

Founded in 1999, Association Laboratory is one of the nation's leading strategic consulting firms specializing in the research and development of business strategy for associations. The award winning company serves a national client base of leading trade and professional associations through staff in Chicago, IL and Washington, DC through qualitative and quantitative research and strategic planning and business modeling.

The company produces a variety of strategic white papers on issues related to association business strategy. These white papers and more information on the company can be found at

[www.associationlaboratory.com](http://www.associationlaboratory.com).