



Indeed Relevant

A Relation-centered Management Model
for Building a Highly-engaged Membership Community
in a Hyper-connected World

A **Working Paper** prepared
for the association community
by a core group of professionals
for the **Melos Institute**

2011 Initiative

Restoring Purposeful Pathways:

Defining the Role of Membership-based Organizations in Advancing America's Potential

This paper is the result of a special project conducted under the auspices of the Melos Institute.

Acknowledgements

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*This **working paper** premieres the work generated by a core group of professionals who offer, for your review and comment, another perspective on association management – an alternative relation-centered management model predicated upon a theoretical framework (human ecology) and a set of universal principles. This model establishes an infrastructure that opens the door for a new set of strategies that blends sound business with essential community development practices. Further research is planned to demonstrate how this approach can engender a more active and highly-engaged membership community.*

We invite your feedback – visit the Melos Institute website to learn how.

A Nation of Possibilities

Association professionals are well aware that membership-based organizations (MBOs) represent and shape every known profession, trade and personal avocation. These institutions play a critical role not only in advancing their respective disciplines but also in making contributions in the larger society. As yet, a full understanding and appreciation of those contributions remains elusive from most Americans. Their ubiquity goes unnoticed by the larger society. And yet, their presence in our society is essential if we are to advance as a nation. Associations may not have satisfactorily conveyed the extraordinary role they have played thus far. But we can control how these institutions continue to contribute as agents of positive change by committing them to address what they do best within their respective disciplines. By doing so, they identify innovative solutions to the most pressing systemic social, cultural and economic issues of our times.

Questions persist surrounding the relevance of MBOs in the 21st century. However these questions are answered, consensus exists that some fundamental changes need to be made to ensure these institutions remain responsive to current members and those of future generations. In ***Indeed Relevant: Creating a Place for Associations to Examine Issues and Discover Solutions in a Hyper-connected World*** we argued that change is continuous and that MBOs have adapted as needed in the past.

Two key questions that remain largely unanswered when thinking about making MBOs more relevant are: ***“What is it that must be changed to make a difference?”*** and ***“Is it possible that changing one element within my MBO will realize the needed transformation?”***

The **Melos Institute** was established to gain a deeper insight into the dynamics and dimensions of MBOs. With the support of a wide range of professionals, the Institute searches for pragmatic solutions to problems that have persisted and hampered progress. Operating as an independent think tank, the Institute brings together a multi-disciplinary group of individuals across generations and professions to examine and explore these institutions in new and different ways. In addition to small group work, opportunities to review findings, offer feedback and suggestions are available through the Institute’s ‘open community.’ Melos takes this grassroots-led and grassroots-fed approach because it recognizes that the answers exist within the vast talent that exists among those involved with MBOs.



An initial core advisory group was assembled within Melos to begin a dialog that produced this document; with the expectation that the findings in this document would be shared with those in the association management community. Realizing that at the heart of MBOs is the desire to increase the service to members and support of the given field through member engagement/involvement, the essential question examined was: What do associations need to look like and how do they need to operate to deliver meaningful and transformative experiences to their members? From those initial discussions, the 'Indeed Relevant' set of working papers was generated for review, comment, adaptation and continued development.

In *Indeed Relevant: The Pivotal Role Associations Play in a Hyper-connected World*, a theoretical framework and set of principles was introduced to explain the emergence and distinctive nature of MBOs in our society. This approach demonstrates that MBOs are atypical from other nonprofit and for-profit organizations. As such, it defines these institutions as embodying two symbiotic dimensions: *a legal corporate entity* (the association's operations) and *a specially-defined micro-community* (the association's membership). Understanding the functions that affect this mutual dependence is essential for any MBO interested in delivering meaningful experiences to their members.

The alternative relation-centered conceptual model presented in this working paper builds upon the theoretical framework and set of principles by offering a set of key functions. It has been deliberately left incomplete awaiting further input from interested professionals – across generations and professions. That input will contribute to the next phase of the research – a more detailed investigation of member engagement/ involvement.

Why Must This Be Done? Why Now?

MBOs serve an exceptional purpose. Their contributions to their respective discipline and the larger society are extraordinary. While well-known among association professionals, the five key contributions are offered to give context to the development of the alternative relation-centered model.

- Harbingers of data, information and knowledge
- Providers of lifelong learning opportunities
- Developers of human capital
- Incubators for innovation
- Partners in governance

Companies and other institutions compete with MBOs by attempting to replicate services and support within these five areas. But they often fail because they can never quite match or deliver the same experience; one that is rooted in the relationship the member builds with the MBO (as an institution), fellow colleagues, other members and staff as they participate in or contribute to various aspects of the organization. MBOs play a distinctive role in a democratic society. With an expanded insight, it has the capacity to deliver meaningful and transformative experiences to members across all generations.

MBO Key Contributions

Harbingers of Data, Information and Knowledge

Individuals find it difficult if not impossible to keep up with all trends, patterns, and innovations in a particular field, without an organization with a cadre of member experts and specialists supporting it. MBOs are information managers that identify, compile, convert and disseminate information in ways that, as the noted futurist, Kevin Kelly, suggests is 'better than free.'

Future Possibilities.

Better systems for tracking, identifying and managing existing and emerging patterns and trends can improve the collection and dissemination of information most relevant for those who need it when they need it. More strategic use of such information can generate the innovative solutions required to resolve persistent challenges.

Partners in Governance

Governing in a democratic society is neither simple nor easy. At the heart of our democracy is the need for citizens to actively and continuously advise and counsel those we empower to lead.

Externally, MBOs counsel our nation's governing bodies on the impact and consequences of legislative or regulatory policies specific to that discipline. Internally, MBOs depend upon their 'member-citizens' to communicate their needs and concerns with their volunteer and staff leadership. This learned behavior often extends to their active involvement in other civic activities.

Future Possibilities.

MBOs can become a legitimate partner by seeking solutions of mutual gain to the problems that prompted specific legislation or regulation. MBOs can become more adept at mobilizing a greater percentage of their own members to participate more aggressively in the governance process both within the association as well as within the larger society.

Providers of

Lifelong Learning Opportunities

Change is continuous. New techniques and technologies are being discovered at an extraordinary pace. 'Learning' is a lifelong endeavor. Advancing knowledge and its application has been the bedrock of MBOs.

Future Possibilities.

Enriching learning experiences with more innovative learning formats, instructional styles, and learning materials responsive to member needs can reposition MBOs as the preferred source for education and training.

Developers of Human Capital

MBOs provide opportunities that help members advance their knowledge and skills. Those members who engage frequently benefit in many ways.

Future Possibilities.

Getting the vast majority of members to understand how to navigate the MBO for their own benefit can have a significant impact on their engagement. Building experiences that fosters social cohesion can establish the kind of relationships that generates a vibrant and highly-engaged member community.

Incubators for Innovation

Healthy democracies enable citizens regardless of background or social standing to challenge existing

boundaries to advance an idea or discover an innovation. MBOs are micro-democracies that provide a platform for those involved to share ideas and discoveries with other colleagues at formal and informal events.

Future Possibilities.

Expand their key role as incubators for innovation by providing the systems that enable members sharing similar goals to connect more easily. Be more strategic in the design of member activities - focusing more on the experience than the event.

A Relation-centered Management Model to Initiate Discussion

In 2010, a study conducted by ASAE (formerly the American Society of Association Executives) reported that MBOs employ over 1 million individuals in various positions. Current economic conditions may require adjusting that number somewhat. It does suggest, however, that the association management profession has reached a critical mass. Since no formal academic institutions offer an accredited degree in association management, it is reasonable to assume that the vast majority of those employed may not fully grasp the unique nature of MBOs in general or their organization in particular. And without that knowledge, it is unclear whether they fully appreciate the need or understand how to create the kind of programs, products, and services that deliver meaningful experiences to the members they serve.

The model presented in this working paper was generated out of a discussion conducted by an interdisciplinary team of association executives, volunteer leaders, content specialists and university scholars (see Acknowledgements).

An earlier working paper, *Indeed Relevant: The Pivotal Role Associations Play in a Hyper-connected World*, offers the underlying theoretical framework (human ecology) and a set of universal principles provide context for its design. The model is presented in a conceptual form to invite conversation on its efficacy before creating more detailed definition. Further research is planned, focused more specifically on member engagement/involvement, to generate details within each function. This effort will enlist a much larger interdisciplinary team of professionals. More information about the next steps of this project can be found on our website: www.melosinstitute.org.

This model is intended to reflect the functions that exist within every MBO. The term '*function*' is used to represent *the most fundamental actions employed by MBOs to fulfill their mission and serve their members*. The terms currently proposed to define these functions may change. Once greater input has been received, adjustments will be made as research on this topic advances to ensure that it reflects the major functions required of associations to operate in ways that fully engage members.

Changes, adaptations and revisions will be made to the model in its present form as input and feedback is received from individuals within the larger association community. The theoretical framework (human ecology), universal principles, and functions will help reaffirm current and identify new actions that will generate highly engaged membership communities. At the same time, it will identify areas critical for more focused research; offering more opportunities for the Institute to pursue in concert with the association community. Ultimately, the goal is to seek solutions to the most persistent challenges that have inhibited these organizations and their members from enjoying a worthwhile experience.

“... You cannot possibly think outside the box unless you understand the nature of the box that bounds your current thinking. You must come to know that nature deeply...”

*Dan Pallotta
2011*

The Model

The Model's Predicates

While MBOs may emerge for similar reasons, they hardly ever develop organizational structures that are identical. With exception of the chief executive officer, other staff titles rarely reflect the same responsibilities when compared across MBOs. What is consistent, however, is that *each requires specific elements* and *possesses similar functions* to operate effectively. Drawing from the theoretical framework (human ecology) and the set of universal principles, these elements and functions provide the foundation for the model.

Key Elements

Three key elements shape and influence the manner by which membership-based organizations operate and are experienced by their members.

Specially-defined Populations: Members & Staff

MBOs represent a specific segment of the general population. This specially-defined population is identified in the bylaws. The homogeneity (defined by specific characteristics) that results facilitates the social cohesion necessary to build, shape and foster a micro-community where every member enjoys rights and privileges but is also accountable to a set of duties and obligations.

MBOs initially operate with the generous support of its members. With growth, routine operations become burdensome. Paid staff are secured to provide support. This requires both groups to establish clear roles and boundaries to ensure that productive working relationships are achieved.

Corporate Entity

Human ecology suggests that as individuals mobilize to address a threat or challenge, a corporate structure is formed thereby delineating a division of labor. Often modest at the start, it eventually expands to the point where a team of volunteer and staff leaders along with a host of member volunteers are required to support the operation.

The corporate entity pursues a special legal status from the government to enjoy certain financial benefits. This often advances its legitimacy in the eyes of its member community and the larger society. The ongoing focus, direction and operation of the corporate entity are guided primarily by its bylaws and influenced by management approaches and techniques designed to ensure its sustainability.

Cultural Norm

All social systems exhibit a formal and informal culture that includes a set of norms and traditions. MBOs are no different. Its culture is first defined by the founders and can easily change by successive leaders over time. The attitudes, behaviors and actions reflected in a culture can be influenced by changes that occur within the discipline or with the introduction of new participants (i.e. new volunteer leaders or paid support). They may also be affected by changes that occur in the larger society such as new technologies and changing social roles.

An MBO's culture generally evolves slowly where the evolution of certain attitudes, behaviors or actions can go unnoticed. But eventually the impact is revealed through a series of desired or undesired behaviors. Ignoring the pulse of a MBOs' culture is to do so at one's own peril.



While much attention has been given to defining governance and management techniques and practices, less attention has been given to defining community development techniques and practices. The model that follows offers an opportunity to blend these two dimensions together. By doing so equal focus is placed – the corporate entity operates with sound business practices and the membership community is cultivated and mobilized to build meaningful relationships.



The Model's Functions

Seven interdependent functions comprise the proposed model. Their integral relationships will be explained as more details are produced with further research. For now, the terms and definitions are presented for review and comment.



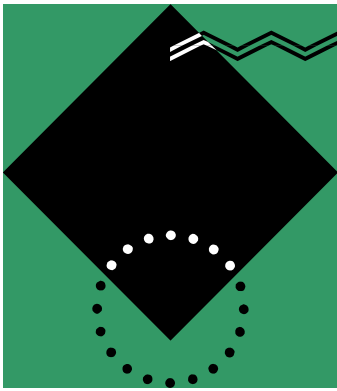
Affiliation & Community Development

MBOs are comprised of specially-defined populations that form their own distinctive communities. These individuals are bound together by a set of norms and mutual dependence. The mutually -beneficial relationship that results produces transformative experiences for all involved; and is the distinguishing characteristic of MBOs. This function focuses on the actions necessary to define, attract, socialize, mobilize and engage those who are eligible to participate in the MBO in ways that fulfill their specific needs as well as advance the goals of the organization. It requires a deeper understanding of the dynamics of affiliation and the dimensions surrounding community development.

The complexities related to the development and cultivation of these types of supra-geographic communities invites further investigation.

Questions that have emerged thus far include:

1. What are the consequences of redefining what it means to be a member and possess a membership in an MBO?
2. What kind of revenue models will ensure MBO sustainability while transitioning to a new model of membership/member community?
3. What is member engagement; how can it be measured?
4. In what ways does traditional marketing inhibit or encourage active engagement within MBOs?



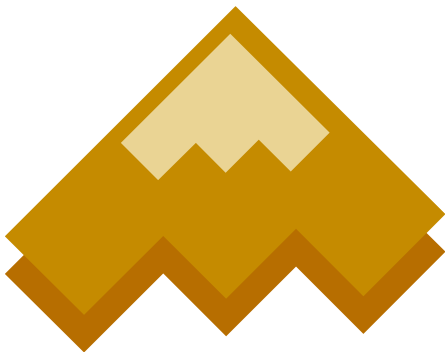
Lifelong Learning

MBOs exist to advance the discipline and all involved. This function focuses on the actions necessary to help individuals within a specified discipline acquire, improve, and strengthen the capabilities and capacities needed to compete in today's rapidly changing environment. It requires a more thorough understanding of the formal and informal learning processes that exist within MBOs; and a deeper awareness of and appreciation for the kind of strategic instructional design and delivery that will create meaningful learning opportunities. Of utmost importance is developing systems that identify, compile, analyze and convert data and information into worthwhile learning experiences in all forms.

The complexities related to the development of formal and informal learning opportunities invites further investigation.

Questions that have emerged thus far include:

1. In what ways can MBOs be more effective than other entities in providing lifelong learning opportunities for their members?
2. How can MBOs maintain vigilance of the changing landscape of the discipline they represent and the impact on those involved?
3. In what ways can peer mentoring (e.g. synergogy) expand the opportunities for meaningful lifelong learning in MBOs?



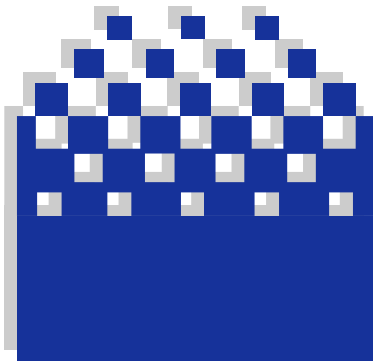
Leadership Development

MBOs are dependent upon their members to serve as member volunteers and volunteer leaders. Because personal leadership skills required to lead MBOs differ from those needed within a specific discipline, members must gain a greater awareness of and competency in those skills that enable them to operate as competent partners with MBO staff. Same is true of the professional staff as many are not fully aware of the distinctions that exist between the MBO and other nonprofit or for-profit organizations. This function focuses on the actions necessary to develop the capacity and competencies of those who assume key leadership or critical support roles. By creating an environment that emphasizes the development of personal, organizational and professional leadership skills, MBOs can more easily avoid of dips and swings that often occur with leadership transition.

The complexities surrounding the development of a formal and informal leadership development process invites further investigation.

Questions that have emerged thus far include:

1. What role(s) should members assume to achieve strong vibrant highly engaged MBOs?
2. What role(s) should staff assume to support the mission of MBOs?
3. What kind of productive working relationship between volunteers, volunteer leaders and staff is needed for MBOs to operate effectively?



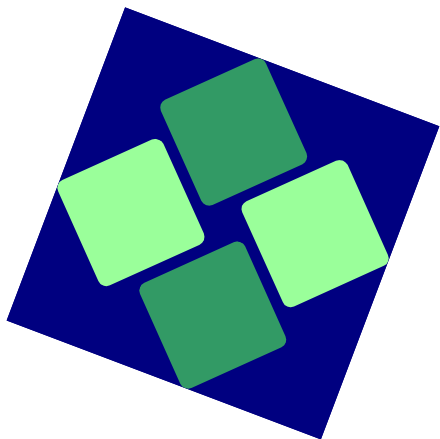
Influence: Legislative and Regulatory/ Advocacy and Outreach

MBOs are community-enhancing micro-democracies. As such, those involved have a responsibility internally and externally to voice support or opposition to specific kinds of change. MBOs bear the responsibility of sharing their life-saving or -enhancing information with those outside their immediate community through outreach and advocacy efforts. MBOs have the capacity to be authentic partners on public policy issues with any group at all levels within a democratic society. As arbiters of information, they understand the dimensions of their discipline and the dynamics that impede or encourage its growth and advancement. This function focuses on the actions necessary to build the kind of strategies and relationships with other organizations, groups, and institutions to address specific issues, expand public awareness or opinion.

The complexities surrounding the development of a comprehensive program to achieve legitimacy, influence, and power invites further investigation.

Questions that have emerged thus far include:

1. What must MBOs do internally and externally in today's environment to build power and influence with government?
2. How can MBOs reduce government intervention?
3. In what ways do MBOs need to legitimize themselves with the general public as non-governmental agents of prosperity, order, competence, and positive change?



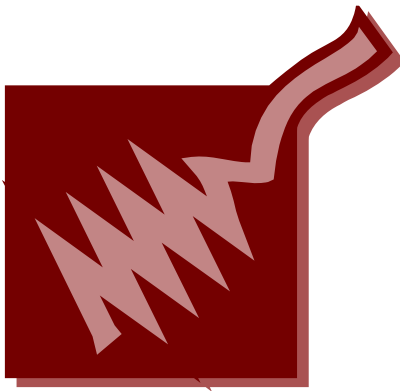
Specific Needs Fulfillment

MBOs are development-focused. Those involved in MBOs often require support separate from the learning arena. MBOs can provide a central place for members and other key figures to gain access to services, resources or people who can be of support. This function focuses on the actions necessary to identify, create and maintain the kinds of services and support to that resonates with their critical needs.

The complexities surrounding the development of a needs-fulfillment program invites further investigation.

Questions that have emerged thus far include:

1. What are the most effective ways to monitor the environment in order to determine emerging needs?
2. What future role(s) should MBOs play in fulfilling needs of members in the organization; of individuals within the discipline?
3. What is the impact of an MBO that broadens its market segments beyond individuals in the discipline to customers and other selected audiences?



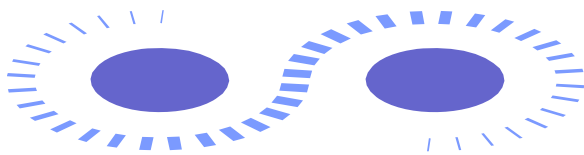
Information Exchange and Dissemination: Internal and External

MBOs are relation-centered. Essential to the member community is the ability to establish and cultivate meaningful and worthwhile connections. Central to this is the ability of the MBO to provide opportunities for frequent, active, and dynamic communication between and among those involved. Equally important is the capacity of the MBO to communicate in a competent, compelling, authentic, and sensitive manner. Such communication fosters an environment of trust. Having systems in place that guide the development and distribution of key information is essential.

Rudyard Kipling suggested that ‘words are the most powerful drug used by mankind.’ Language that inspires community development and public activism must be learned, incorporated, and institutionalized into the MBO’s culture.

The complexity that surrounds the way in which information is exchanged and disseminated invites further investigation. A question that has emerged thus far includes:

1. What are the consequences of using business-oriented communication techniques on community development?
2. What kinds of communication enrich relationship-building among members and between members and professional staff?



General Operations: Governance and Management

As micro-democracies MBOs must ensure the right macro- and micro-systems are in place that comply with external requirements and remain responsive to the needs and expectations of those involved. This function focuses on the

actions necessary for the overall effective and efficient operation of the MBO’s corporate entity. These actions must enable the leadership bodies to work collectively to identify, examine, evaluate and explore ways to ensure that the institution employs the most effective business practices, engages in actions that facilitate the achievement of its mission, yet maintain its focus on fostering a vibrant member community.

The complexities surrounding the general operations of an MBO invites further investigation. Questions that have emerged thus far include:

1. What planning models better enable MBOs to advance their efforts?
2. What kind of governance model(s) (e.g. board, committees, smaller work groups, etc.) are better suited for MBOs to achieve their goals?
3. What is required for MBOs to be transparent to their members and other key audiences?
4. What internal and external challenges keep MBOs from operating in a fully ethical manner?
5. What other roles might MBOs assume if their presence was expanded further in our society?
6. What types of advancements could be achieved for their members, their respective domain(s), and society-at-large if MBOs took a more aggressive/bold approach to achieving positive change?

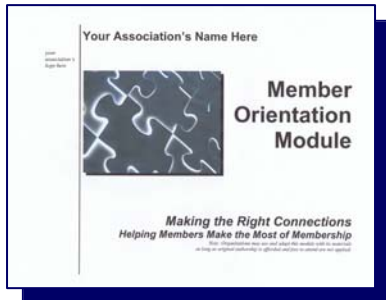
Sample Tools That Can Make a Difference Now

MBOs are complex social systems. Simple solutions may offer temporary relief but rarely produce the kind of long-term change most desired. Since MBOs are substantially different from for-profit and other nonprofit organizations, they benefit most when they become open to exploring their dimensions and dynamics in a new and different way. Strategies to achieve that level of sustainable positive change require examining MBOs from a systems perspective.

But to what end? What difference will it make?

By examining and planning from a systems perspective, the actions proposed are often designed to change the immediate environment experienced by the members. Consistent and sustained actions become institutionalized in the system and ultimately influence the culture. And a culture that exhibits norms and traditions that fosters community while managing efficiently and effectively has a greater chance of experiencing a high degree of member involvement.

A wide range of tools must be employed to accomplish that end. Their design must align with the kind of principles and processes responsive to building social cohesion within the member community (and among the staff). The following tools are offered on the *Melos Institute's website* as examples of the kind of practical support that can be generated in the future through research conducted through the Institute. We are available to explain their design and use in greater detail. We look forward to getting your feedback of their value to you.

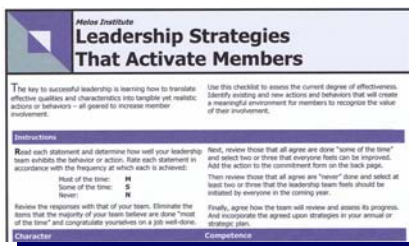
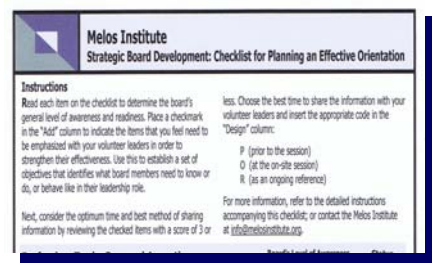


Making the Right Connections: An Alternative Member Orientation

This tool helps members understand what it means to be a member; the role they play (rights, privileges, duties and obligations). It shows them how they can make membership meaningful; and outlines how they are accountable

Checklist to Planning an Effective Board Orientation

This tool helps assess the information, skills, and techniques necessary to include in an orientation to build the capacity of your board of directors over time.



Leadership Strategies that Activate Members Assessment

This tool helps determine the leadership development strategies that need to be enhanced or added to increase the competency and capacity of volunteer and staff leaders.

Let Us Know Your Thoughts

We trust that this working paper has reaffirmed current as well as inspired some new thoughts about membership-based organizations. Your input – whether positive or negative – is requested. We welcome your questions.

Frequent opportunities to connect are being scheduled for 2012. Please visit our website to find those that might be of greatest interest and convenience to you. Look for more information on our website, Facebook and LinkedIn.

Where We're Going Next

Focus on Member Engagement/Involvement

Most members want a meaningful connection with their organization. Studies conducted by various MBOs have shown that members across all generations are looking to be engaged in ways that are worthwhile. While member engagement in the community is a generally accepted expectation, it appears that no standard agreement, accepted processes, and means for measurement exist. If MBOs are to fulfill their members' expectations, a more sophisticated systemic understanding about how to create strategies that build, shape and sustain a highly engaged membership is required.



With the support of a multi-disciplinary team of advisors and the association community, the next phase of the Institute's research will focus on key issues surrounding member engagement including establishing:

1. An operational definition and appropriate measures;
2. A baseline of the current values, processes and practices used;
3. A generic framework that can support planning efforts; and
4. An assessment tool that MBOs can use to gauge their member engagement quotient.

We believe the impact on developing such a model and its practices for MBOs would be threefold:

1. Ensure that members enjoy their rights and privileges and fulfill their duties and obligations as citizens of the membership community;
2. Ensure the organization benefits from the skills, abilities, and talents that members possess to achieve its goals and further its mission; and
3. Provide a deeper understanding of how to positively impact member engagement/involvement within a membership community.



We invite you to participate. Detailed information is available on the Melos Institute's website.

Although donations are welcome, no dues or fees required to participate. Simply, your willingness to contribute fully.

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