

March 2, 2014

Arlington, VA

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# Goal

To develop current state and regional association leaders, while also exposing up and coming leaders to leadership development. Each session will focus on several of the Quality Association Standards as well as Leadership Development.

# Summary of the Quality Association Standards

1. **Mission, Goals, and Objectives**- The association must have adopted a current, clear and positive mission statement, goals and objectives. The association must be able to demonstrate how it presently fulfills its mission and meets its goals and general objectives as articulated in its strategic plan (long range plan). It must be able to show how it plans to achieve its general and specific objectives in the future.
2. **Governing Body, Officers, and Directors**- The governing body of the association represents major interests of the membership. Provision for periodic rotation of officers and directors is desirable. The roles of the officers and directors must be clearly defined and the manner in which they are fulfilling their functions demonstrated. Formal orientation procedures for governing body members are in place and regularly conducted.
3. **Organizational Structure and Documents**- The association must have Articles of Incorporation/Association and bylaws and demonstrate that it operates in conformance with federal and state laws. It must show that all pertinent documents are periodically reviewed, are consistent with one another, revised when necessary and that the association’s organizational design and operations are in keeping with its constitution and bylaws or equivalent documents.
4. **Programs, Services, and Activities**- There must be evidence that the association’s programs, services and activities meet member and other targeted groups’ needs, are formally planned, funded, coordinated, implemented, monitored, and evaluated, and that sufficient human resources are available to implement, maintain and evaluate these programs, services and activities.
5. **Financial Planning and Reporting**- Financial planning must relate directly to the association’s strategic plan and programming. The association must have realistic plans for developing income and controlling costs. It must present evidence of fiscal controls, a full-disclosure reporting system and an annual audit
6. **Membership Development and Retention**- The association must demonstrate that its current membership/potential membership ratio is reasonable. It must have an effective and continuing program of membership retention and recruitment.
7. **Communications**- The association must demonstrate that its external and internal communications are commensurate with membership needs, that they address the various audiences (publics) that influence the goals and objectives of the organization, and that the association utilizes technology as appropriate.
8. **Public Policy**- The association must demonstrate that it has established a list of clearly defined issues which are monitored regularly through analysis and reporting, and whose findings are communicated to the members and the outside public in a timely way. The association must show that there is adequate funding for a public policy program at all levels, that it is successful in gaining access to key decision makers, and that it has shown success in achieving its goals.
9. **Association Operations**- The association must have in place a workforce and systems to effectively operate the organization. The size, skills, and reporting relationships of the volunteer workforce or staff are directly related to the scope of services provided by the association. If paid staff is utilized there must be evidence of stability in staff, a clear organizational structure, and appropriate personnel practices. The association must demonstrate that it has in place a cohesive office automation plan, taking into account current as well as anticipated future needs. Such a plan should include provisions for data base management, accounting, and telecommunications, and must be appropriate for the size and scope of operation. Additionally, system procedures should be fully documented and secure from unauthorized access.

# 7 Measures of Success

**What Remarkable Associations Do That Others Don’t**

*Study published by the American Society of*

*Association Executives*

In 2006 the American Society of Association Executives published the results of a study that identified the characteristics of a “great” association. The study utilized the model created by Jim Collins in *Good to Great* and Mr. Collins served as an advisor on the study.

Eventually, three years of data gathering and analysis culminated in the identification of seven factors, or measures of success, that differentiate remarkable associations from their counterparts. These characteristics are deeply ingrained in the study group’s organizational DNA. They represent commitments consistently honored by the organization, not just intentions, aspirations or marketing messages.

The attached page outlines the seven measures. No one measure outweighs the others; all contribute equally to an association’s ability to innovate, grow, and thrive over time. They are not presented in any particular order or priority but rather grouped into three categories.

**Seven (7) Measures of Success**

**Commitment to Purpose**

*A Customer Service Culture* – A “we’re here to serve you” approach not only permeates all individual encounters with members but also is built into organizational structure and processes.

*Alignment of Products and Services with Mission* – The depth and breadth of offerings are consistent with the organization’s mission, which remains central and unchanging even in the midst of changes in the external environment.

**Commitment to Analysis and Feedback**

*Data-Driven Strategies* – Remarkable associations have developed an expertise in gathering information as well as processes for sharing and analyzing the data to deduce what actions the data point to taking.

*Dialogue and Engagement* – An internal conversation continually occurs among staff and volunteers about the organization’s direction and priorities.

*CEO as a Broker of Ideas* – Although the CEO may be visionary, what’s more important is that the CEO facilitates visionary thinking throughout the organization.

**Commitment to Action**

*Organizational Adaptability* – Remarkable associations learn from and respond to change; although willing to change, they also know what *not* to change.

*Alliance Building* – Associations that are secure and confident in their own right seek partners and projects that complement their mission and purpose.

# Agenda

9:00 – 9:45 a.m. Welcome, Introductions and Ice Breakers- Mike Stone

9:45 – 10:00 a.m. Review of First Session- Mike Stone

10:00 – 10:45 a.m. State Programs and Communications Panel- Moderated by Coleen Keffeler

10:45 – 11:00 a.m. Break

11:00 – 12:00 p.m. Breakout Tables on each QAS criteria- Coleen Keffeler

12:00 – 1:00 p.m. Lunch Break

1:00 – 2:00 p.m. StrengthsFinder 2.0 Training with David Jones- Introduction by Katrina Plese

2:00 – 3:00 p.m. US Army Leadership Session- Introduction by Katrina Plese

3:00 – 3:15 p.m. Break

3:15 – 4:00 p.m. Reflection and Sharing- Sherry Adrian

4:00 – 5:00 p.m. Closing and Certificate Presentation- Coleen Keffeler and ACTE Officers

*The State Leadership Training Program is made possible thanks to sponsorship from the US Army.*

*Many thanks to the members of the panel and the speakers for sharing their expertise:*

Matthew Gambill- Executive Director, GA ACTE

Tim Knue- Executive Director, WA ACTE

Michael Connet- Sr. Director of Programs and Communications, ACTE

Lina Perez- Marketing and Membership Manager, ACTE

David Jones- North Carolina State University

The US Army

*A special thanks to the members of the Leadership Task Force for their assistance in developing the program:*

Coleen Keffeler Chair

David Jones Member

James Scott Member

Michael Stone Member

Van Hughes Member

Marie Howard Member

Katrina Plese Board Liaison

Sherry Adrian Board Liaison

# Station 1

**QAS Criteria Covered:**

**Programs, Services and Activities**

**7 Measures of Success addressed by the QAS Standards:**

**#1 Customer Service Culture**

**#2 Alignment of Products and Services with Mission**

**Programs, Services, and Activities**- There must be evidence that the association’s programs, services and activities meet member and other targeted groups’ needs, are formally planned, funded, coordinated, implemented, monitored, and evaluated, and that sufficient human resources are available to implement, maintain and evaluate these programs, services and activities.

Please review the following components of 7 MEASURES Self-**Assessment Tool (© ASAE & The Center for Association Leadership 2006).**

Consider your state association when completing each statement. Please indicate your level of agreement with each item by assigning a “score” to each statement; 1 being **strongly disagree** and 5 being **strongly agree**. Once complete, total and average your score in the yellow row for each section. A mean score total of below 3 indicates that this section may be an area in need of improvement.

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Item #** | **Area and Item** | **Score** | **Comments** |
|  | **Measure 1: Customer Service Culture** | **TOTAL/6=** |  |
| 10 | We know a great deal about our customers’ needs because we collect data routinely about what they want. |  |  |
| 45 | We have segmented our market so we can tailor our offerings to the different segments. |  |  |
| 14 | All our staff, no matter what role or department, view themselves as customer service agents. |  |  |
| 38 | Our organization operates within a budget driven by customer needs. |  |  |
| 6 | Our mission statement and vision for the future are customer-driven. |  |  |
| 23 | We track how we are doing regarding customer service by measuring customer satisfaction with our products, services, interactions, etc. |  |  |
|  | **Measure 2: Alignment of Products and Services with Mission** | **TOTAL/6=** |  |
| 1 | The organization has a clear statement of what it does and why it exists. |  |  |
| 12 | The major activities of the organization are consistent with the organization’s mission. |  |  |
| 28 | Organizational changes are consistent with the organization’s mission. |  |  |
| 50 | The organization has products and services that generate revenue but are not related to our mission. |  |  |
| 36 | Organizational leaders and staff demonstrate a clear understanding of the organization’s mission. |  |  |
| 21 | Key leaders and staff can recite the organization’s mission statement. |  |  |

Based the information presented in today’s session, please consider your own state association and discuss the following questions:

1. How would you grade your state association’s current level of Programs, Services and Activities?
2. What could your state association do to grow in the area of Programs, Services and Activities?
3. Does your state association work to build your Programs, Services and Activities? If so, with what groups and how?
4. What best practices from your state would your recommend to other state associations? If you do not have any, what best practices would you be interested in learning about?
5. Please brainstorm some ideas on Programs, Services and Activities that could be pursued.

# Station 2

**QAS Criteria Covered:**

**Membership Development and Retention**

**7 Measures of Success addressed by the QAS Standards:**

**#1 Customer Service Culture**

**#3 Data Driven Decision Making**

**Membership Development and Retention**- The association must demonstrate that its current membership/potential membership ratio is reasonable. It must have an effective and continuing program of membership retention and recruitment.

Please review the following components of 7 MEASURES Self-**Assessment Tool (© ASAE & The Center for Association Leadership 2006).**

Consider your state association when completing each statement. Please indicate your level of agreement with each item by assigning a “score” to each statement; 1 being **strongly disagree** and 5 being **strongly agree**. Once complete, total and average your score in the yellow row for each section. A mean score total of below 3 indicates that this section may be an area in need of improvement.

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Item #** | **Area and Item** | **Score** | **Comments** |
|  | **Measure 1: Customer Service Culture** | **TOTAL/6=** |  |
| 10 | We know a great deal about our customers’ needs because we collect data routinely about what they want. |  |  |
| 45 | We have segmented our market so we can tailor our offerings to the different segments. |  |  |
| 14 | All our staff, no matter what role or department, view themselves as customer service agents. |  |  |
| 38 | Our organization operates within a budget driven by customer needs. |  |  |
| 6 | Our mission statement and vision for the future are customer-driven. |  |  |
| 23 | We track how we are doing regarding customer service by measuring customer satisfaction with our products, services, interactions, etc. |  |  |
|  | **Measure 3: Data Driven Strategies** | **TOTAL/10=** |  |
| 32 | Organizational leaders and staff demonstrate a clear understanding of the markets they serve |  |  |
| 22 | Data from environmental scans is included in our decision-making processes. |  |  |
| 24 | We do not collect data for data’s sake. Every research effort has a purpose and is carefully planned. |  |  |
| 37 | We have a plan for sharing and communicating the data from the outset and we follow through with that plan, even if it the research findings are negative. |  |  |
| 39 | Several different methodologies are used to collect data about particular issues (e.g., focus groups, surveys, interviews). |  |  |
| 7 | For each research project, data are always related to similar or appropriate information from other sources. |  |  |
| 44 | Resources are committed by the organization that are necessary to do good solid research. |  |  |
| 53 | The organization conducts a formal evaluation to assess whether its outcomes have been achieved. |  |  |
| 18 | Evaluation data are used to modify organizational activities. |  |  |
| 33 | Market research data are used to modify/develop programs. |  |  |

Based the information presented in today’s session, please consider your own state association and discuss the following questions:

1. How would you grade your state association’s current level of membership development and retention?
2. What could your state association do to grow in the area of membership development and retention?
3. Does your state association work to build membership? If so, with what groups and how?
4. What best practices from your state would your recommend to other state associations? If you do not have any, what best practices would you be interested in learning about?
5. Please brainstorm some ideas on membership development and retention initiatives that could be pursued.

# Station 3

**QAS Criteria Covered:**

**Communications**

**7 Measures of Success addressed by the QAS Standards:**

**#4 Dialogue and Engagement**

**Communications**- The association must demonstrate that its external and internal communications are commensurate with membership needs, that they address the various audiences (publics) that influence the goals and objectives of the organization, and that the association utilizes technology as appropriate.

Please review the following components of 7 MEASURES Self-**Assessment Tool (© ASAE & The Center for Association Leadership 2006).**

Consider your state association when completing each statement. Please indicate your level of agreement with each item by assigning a “score” to each statement; 1 being **strongly disagree** and 5 being **strongly agree**. Once complete, total and average your score in the yellow row for each section. A mean score total of below 3 indicates that this section may be an area in need of improvement.

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| --- | --- | --- | --- |
| **Assessment Item #** | **Area and Item** | **Score** | **Comments** |
|  | **Measure 4: Dialogue and Engagement** | **TOTAL/7=** |  |
| 41 | Staff and volunteers have easy access to what they need to know when they need to know it. |  |  |
| 34 | Staff and volunteers receive regular feedback on how the organization is performing. |  |  |
| 29 | Staff throughout the organization are involved in developing plans. |  |  |
| 47 | All parts of the organization demonstrate a clear understanding of what other parts of the organization are doing. |  |  |
| 43 | Each part of the organization positively interacts with the other parts of the organization. |  |  |
| 35 | Cross-functional teams are commonly used to accomplish organizational goals. |  |  |
| 3 | Each individual’s responsibility for achieving an outcome is clearly defined. |  |  |

Based the information presented in today’s session, please consider your own state association and discuss the following questions:

1. How would you grade your state association’s current level of communications?
2. What could your state association do to grow in the area of communications?
3. Does your state association work to build dialogue and engagement? If so, with what groups and how?
4. What best practices from your state would your recommend to other state associations? If you do not have any, what best practices would you be interested in learning about?
5. Please brainstorm some ideas on communications initiatives that could be pursued.

# Station 4

**QAS Criteria Covered:**

**Public Policy**

**7 Measures of Success addressed by the QAS Standards:**

**#7 Alliance Building**

**Public Policy**- The association must demonstrate that it has established a list of clearly defined issues which are monitored regularly through analysis and reporting, and whose findings are communicated to the members and the outside public in a timely way. The association must show that there is adequate funding for a public policy program at all levels, that it is successful in gaining access to key decision makers, and that it has shown success in achieving its goals.

Please review the following components of 7 MEASURES Self-**Assessment Tool (© ASAE & The Center for Association Leadership 2006).**

Consider your state association when completing each statement. Please indicate your level of agreement with each item by assigning a “score” to each statement; 1 being **strongly disagree** and 5 being **strongly agree**. Once complete, total and average your score in the yellow row for each section. A mean score total of below 3 indicates that this section may be an area in need of improvement.

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Item #** | **Area and Item** | **Score** | **Comments** |
|  | **Measure 7: Alliance Building** | **TOTAL/6=** |  |
| 25 | My organization routinely scans the environment for common and broad issues and challenges that may require action driven by coalitions and partnerships. |  |  |
| 26 | We have clear criteria for determining the organizations with which we should develop relationships. |  |  |
| 15 | Decisions about formal relationships with other organizations are guided by our strategic plan. |  |  |
| 16 | We do not exclude competitors or unconventional organizations as potential partners or collaborators. |  |  |
| 49 | We believe the foundation for effective partnerships or alliances is a win-win: each partner gets something they want from the relationship. |  |  |
| 31 | The major goals for forming an alliance or partnership for our organization is to further our mission and satisfy/meet the needs of members, not necessarily to increase revenue. |  |  |

Based the information presented in today’s session, please consider your own state association and discuss the following questions:

1. How would you grade your state association’s current involvement in public policy?
2. What could your state association do to grow in the area of public policy?
3. Does your state association work to build alliances? If so, with what groups and how?
4. What best practices from your state would your recommend to other state associations? If you do not have any, what best practices would you be interested in learning about?
5. Please brainstorm some ideas on public policy initiatives that could be pursued.

# Reflection and Sharing

Reflection is a critical analysis or thinking aimed at achieving a better understanding of one’s thoughts and/or actions. Reflection allows us to analyze our experiences. Reflection allows for acknowledgement of what went well and what could be done differently in the future. Reflection is a process of creating clarity that can be used in future planning, implementation and assessment of activities.

Please consider your state association in light of the training you received today. Think about which QAS area needs the most improvement in your state association. Use the following questions to guide your action planning:

1. What is the area in need of improvement (please be as specific as possible)?

2. What is currently being done in this area?

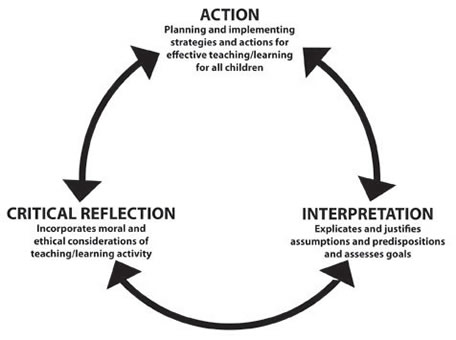
3. Complete the chart below in regards to the area of improvement:

|  |  |
| --- | --- |
| What is working well: | What is not working: |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

4. How could the areas that are not working be improved upon?

5. How could this have been done differently?

6. What should I change or work on for next time?

7. What would be the first step?

8. How do I go about implementing the change?