WIN THE FUTURE

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Out of the Ordinary

New trends in association management have created niches for consultants. Three speak about what it means to help associations get ahead of the curve in addressing new challenges—and then stay there.

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The Skills Association Consultants Will Need in the Next Five Years

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“Let them eat cake!” said Marie Antoinette, queen of France during the French Revolution, demonstrating how out of touch she was with her subjects. Association executives may not be in so dramatic a situation, but the lesson is the same: It’s critical to keep in touch with an organization’s ever-changing needs.

Associations exist to connect with and serve members, and the purpose of the Associations Now Guide to Consulting Services is to help you better achieve those goals while preserving peace of mind; it’s here to help you have your cake and eat it too (see what I did there?).

Thinking about the importance of consultants reminds me of Good to Great, Jim Collins’ bestselling business book. While Collins describes a number of concepts and disciplines that guide companies to greatness, one of them has always stood out for me: People are not your most important asset, the right people are.

Whether it is assessing constituent needs; defining strategic priorities; developing marketing, sales, or delivery strategies; investing excess capital; advocating for your constituency; or implementing new systems, it’s essential to hire the right people—in many cases, the right consultants. They can add expertise, independence, bandwidth, and specialized skills to your programs, projects, and activities.

Beyond slogans, mottos, or creeds, what truly enhances your association’s value proposition is delivering exceptional products and services to your members and stakeholders. But that’s only true if they know that these products and services exist, how they will benefit from them, and know where and how to get them. If your association needs help getting any of that right, there’s a consultant for it right here at your fingertips.

To return to that cake metaphor: You can’t bake one without all the necessary ingredients, and better ingredients make better cakes. It takes people, systems, and protocols, all of which run in a seamless, integrated way to deliver what your constituents and customers want when they want it. Whether consultants supplement your team with specialized skills and experience or are additive to create volume when needed, enhanced value is the path to becoming a great association—or maintaining that status.

Inside this guide are tools to help you find the right people to deliver independent, specialized skills, knowledge, and assistance when you need it. Keep the guide handy (or look for it online at asaecenter.org) so you can refer to it anytime you have an opportunity or challenge or simply when you need an extra hand.

NAT BARTHOLOMEW, CPA, chair of ASAE’s Key Consultants Committee, is principal in charge, associations and membership organizations, at CliftonLarsonAllen LLC in Arlington, Virginia. Email: nat.bartholomew@claconnect.com
RECONSIDER THAT RFP

Not every project is a good fit for a formal request for proposals. If you’re seeking out a consultant, taking the time to get personal can save you trouble and effort down the road.

For many associations, enlisting a consultant’s help often begins with what seems like an obvious first step: sending out a request for proposals detailing the kind of work required, timeframe, budget, and so on. Gather in the responses, have your team identify the best fits, and make some interview calls. Simple.

But perhaps not. An association can make the mistake of firing off an RFP before it has much clarity about what it’s looking for—a misstep that sows frustration for both the association and the consultant alike.

“Some RFPs are too vague, and in order to respond with enough information—including, if requested, an estimate of fees and charges—I need lots of information that may not be included in an RFP,” says Joan Eisenstodt, a meetings and hospitality consultant. “And that information is certainly not in an email that says, ‘We’d like to engage you to ...’”

Sometimes, though, the problem with an RFP runs deeper than lack of detail. When it comes to more complex strategic work that goes beyond buying a technology product or selecting a meeting venue, an association sometimes errs in sending RFPs before knowing what problem it’s trying to solve, says Jeff De Cagna, FASAE, executive advisor of Foresight First LLC.

“Associations should ask, are we doing an RFP because we have a policy that says we have to do an RFP? Are we doing an RFP because we think the board wants it? Are we doing an RFP because we’re trying to get the lowest price?” he says. “I don’t think those are good reasons.”

More “conversational” shortcuts, like emailed questions or scripted phone calls, may not do the trick, either. “With vocal RFPs, even if one uses a script, the questions asked by the potential consultant can differ and thus the proposals are likely to be too different,” says Eisenstodt.

For strategy work, De Cagna recommends that associations invest in conversations with potential consulting firms, which can be brief and are often a time-saver in the long run.

“A simple, relatively straightforward way [to do this] is to frame what the questions are that you’re trying to answer through whatever kind of consulting work you’re seeking, then identify people who you think might have answers to those questions,” he says. “I very much prefer speaking directly with CEOs or other senior decision-makers to understand their issues and talk through possible approaches. At that point, I send them a proposal to consider.”—Mark Athitakis
FIRST STEPS TO SUCCESS

The best consulting relationships are just that—relationships. Here’s how to make sure yours get a solid start.

The early stages of a relationship between an association and a consultant can be complicated, as everybody works to pinpoint needs and how to resolve them. Adele Cehrs, CEO and founder of the When and How Agency, has five recommendations for associations to help cut through those challenges and get the relationship off to a good start.

**Look beyond cost.** “I think some associations waste a lot of money on hiring the cheapest option instead of thinking about what they want to achieve,” Cehrs says. Rather than looking exclusively at cost, consider consultants who are well-versed in association org charts and can identify roadblocks that a project might meet along the way. “If you can’t afford the full engagement with a very experienced consultant, try a pilot project or an abbreviated project with the experienced consultant, instead of going for the cheapest price.”

**Clarify how you and the consultant will work together day-to-day.** Consultants aren’t set-it-and-forget-it appliances. They’ll need assistance and input from the association’s leaders and staff. “Ask the consultant to be honest about how much time they’ll need from your internal staff to manage the project,” she says. “If they say ‘none,’ then you know that they aren’t being realistic. All projects require some internal staff time commitment to make the project a success.”

**Let the consultant and the board meet.** For substantive projects that require board approval, Cehrs asks for an opportunity to meet with the board and discuss the proposal. “How can you get someone else to sell what you’re an expert at?” she says. The consultant isn’t there to “sway” a board, but rather to answer questions critical to the project. Without that step, “I think maybe that’s where some expectations get misconstrued or the engagement goes awry, because the [staff] person may have promised something that, if I was asked the same question, I wouldn’t have responded in the same way.”

**Get testimonials and references.** If consultants are is good at what they do, they likely have former clients who can recommend them. “If not, you should seriously consider another option,” Cehrs says.

**Establish regular check-ins.** Nothing is more dispiriting for a consultant and client alike than a project outcome that doesn’t look like what was expected. Avoid being blindsided by establishing milestone check-ins. “Don’t wait until the end of the engagement to air a grievance,” she says. “It’s really important to talk about return on investment, and that should be a conversation you have at multiple points of the engagement.”—M.A.
SIX TIPS FOR CONSULTING CONTRACTS

Get your consultant relationship on firm legal footing with the right contract terms and a clear scope of work.

BY DAWN CROWELL MURPHY

Consultants are often a key resource for achieving your association’s mission. When you hire a consultant, it’s important not only to find the right one, but also to make sure you enter into a contract that clearly defines the terms of the relationship and the scope of work for the project.

Here are six important considerations for drafting or reviewing consulting contracts.

1. Relationship of the parties. The contract should provide that the consultant is an independent contractor and disclaim attributes of employment, particularly if the consultant is a sole practitioner. Merely stating this in writing doesn’t make it so. If there is any uncertainty about the consultant’s proper classification as an independent contractor, consult with an attorney, as penalties for misclassification can be steep. Making expectations clear in the contract is a good place to start and is one of the factors bearing on independent contractor status.

2. Scope of work (SOW). To avoid confusion and potential disagreement down the road, a consulting contract should include as much detail as possible regarding what services or deliverables are to be performed or produced and by whom. This often includes a timeline or, at the least, a final deadline, and it may include technical specifications or service levels to be met. Ideally, the SOW will name who will perform each task.

3. Deficiencies. What happens if the services or deliverables do not meet expectations? Consider including in the contract a process that enables you to review and accept the work or ask for corrections (this is where having detailed specifications to compare against comes in handy). Provide for consequences if the work does not live up to what’s required by the contract, whether that means the work must be repeated or replaced or a credit or refund given—possibly after termination of the relationship for breach.

4. Ownership. Specify who owns materials related to the work and how the other party may use them. Often, your association will own any deliverables or work product produced under the contract, but the consultant may bring preexisting materials to the table, which it continues to own or license. Your association may also be contributing your intellectual property or other materials, in which you reserve ownership rights. The contract might include restrictions on how each party may use the other’s owned or licensed materials.

5. Confidentiality. Consultants may be exposed to confidential or proprietary information of your association and its members, so include in the contract assurance that the consultant—including any of its employees or subcontractors—will keep that information confidential and not disclose it without your permission or as otherwise required or permitted by law.

6. Term and termination. Determine the timeframe for the work and whether it makes sense for the contract to end as of a project deadline or to continue for a longer term, covering additional SOWs. Spell out any terms for renewal and early termination. Can you terminate for convenience at any time, so long as you pay for the work done up to that point? Or can you get out of the contract before it’s completed only for specified causes, such as a default or breach by the other party?

Addressing these key items in consulting contracts should help your consultant relationships—and the programs and work of your association—run more smoothly.

DAWN CROWELL MURPHY is counsel with Pillsbury Winthrop Shaw Pittman LLP’s Nonprofit Organizations Practice in Washington, DC. Email: dawn.murphy@pillsburylaw.com
New trends in association management have created niches for consultants. Three speak about what it means to help associations get ahead of the curve in addressing new challenges—and then stay there. **BY MARK ATHITAKIS**
A few years ago, Sherry Marts began asking association executives about what plans they had to respond to sexual harassment at their meetings.

“The response I would get was, ‘Well, we don’t have a problem with it because no one’s ever reported anything,’” she says. “So I would ask them a rapid-fire series of questions: Where do you publish your code of conduct? Do you even have a code conduct? Did the people at your meetings know who to report the incidents to? And of course the answers were no, no, no, no.”

Fast-forward to the present day. As the #MeToo movement and conversations within the association community have drawn increased attention to harassment at conferences and events, Marts, founder of S*Marts Consulting, finds herself increasingly in demand as a speaker and facilitator on the subject.

Progress has been slow. “The organizations that have a really good code of conduct—and that also enforce that code of conduct effectively—are definitely in the minority,” she says. But the work is no longer dismissed as unnecessary.

As associations evolve, their needs inevitably change, which means that new consulting niches emerge to help solve new problems. Many of these new specialties are rooted in technology, which is ever-shifting, of course. But they also include work like Marts’, which focuses on improving the old-fashioned business of meetings that’s at the heart of what associations do.

ORDER FROM CHAOS
Joseph A. Busch, founder and principal of Taxonomy Strategies, describes his firm’s work as straightforward:

“At the highest level, we help people organize their stuff,” he says.

But the job isn’t Marie Kondo-simple. Organization has always been a difficult task for associations, and it’s become more complex as data has proliferated across a host of platforms: email, intranets, websites, social media tools, AMSes, and more. Corralling all of that data has become both increasingly important and increasingly difficult.

As the firm’s name suggests, Taxonomy Strategies focuses on developing common terminologies that associations can use across platforms to help them highlight themes or simply to find relevant material. “Associations are trying to get their arms around how they can take advantage of all types of digital information,” Busch says. “That’s not just their transaction systems. It’s their document repositories, whether it’s SharePoint or shared drives or something else.”

The business benefit comes from time saved figuring out what information an association does and doesn’t have. “There is this situation that happens in all organizations where you just do the same thing over and over again,” he says. “And that’s not necessarily lost effort, but we’re all busy and we’re limited in terms of our resources. It can really become a drain on our ability to be effective.”

The pace of change when it comes to data might be matched only by the heightened concern about data privacy and security. The European Union’s General Data Protection Regulation (GDPR) and the California Consumer Privacy Act have established new rules around how associations use and protect member and customer data, which has sparked more engagement with consultants serving those needs, says Bill Rankin, manager, compliance and privacy services, at American Technology Services. “Relevance and prevalence are definitely on the rise for privacy,” he says.

But Rankin notes that conversations about privacy shouldn’t exclusively be about how to keep data out of the reach of hackers. They should also explore ways to ensure that members and customers have access to data that’s important to them.

“Privacy is about the use of the data, making sure it’s used appropriately,” he says. “But it’s also about a kind of loosening up of those restrictions. Giving somebody the ability to actually access the data you have on them is a big part of privacy. Giving them the ability to manipulate that data to correct things that are incorrect: name changes, email changes, address changes.”

But the first step is to make sure you know what data you have, he adds, and many associations need help with that. “The whole point of all that is making sure that associations are really taking a comprehensive approach to looking at all of their data stores: your AMS, your CMS, Google Analytics, anything you outsource to marketing companies, or data you’re bringing in from other sources.”

START WITH CONVERSATIONS
Projects relating to technology and meetings aren’t one-size-fits-all affairs. The taxonomy and security needs of smaller associations are less complex that those of larger organizations, and the diversity of challenges related to meetings can require an individualized approach based on an organization’s unique situation.

Eventually, specific engagements must be outlined in a scope of work, and Busch says early conversations with clients can clarify what outcomes are most essential and identify the best way to accomplish them. “The work can be done in a very broad and widespread way, but it could also be done with smaller groups in ways that are much more focused,” he says. “Projects can be chunked up in pieces.”

When sorting out the scope of work, “a lot of what we do is a
combination of talking to people to understand what they’re trying to do and finding out where there may be some problems and recognizing what might be amenable to improvement,” Busch says.

Those conversations with a consultant can be especially helpful when it comes to responding to new regulations, says Rankin.

“One thing I always have to remind people is that you have the answers,” he says. “As a consultant coming in, my job is to have conversations with you and try to extract those answers and maybe fill in some blanks. You should work with somebody who’s good at having those conversations.”

Marts tries to engage with organizations by meeting them where they are—which is less often in response to a particular incident of alleged harassment at a meeting and more often out of eagerness to prevent one from happening.

“I love framing this in terms of inclusion,” she says. “A lot of what I’m hearing about now [from associations] is less on the sexual harassment side and increasingly racial harassment, harassment on the basis of perceived immigration status, harassment on the basis of perceived sexual identity or gender. So if your organization has been paying lip service to inclusion, this is one way to make it concrete and actually make it happen at your meeting.”

**EMPOWERING CLIENTS**

Marts, Rankin, and Busch agree that the goal of a consulting relationship should be to empower the association to handle problems on its own as much as possible. Privacy consultants, for example, can assist with compliance, but organizations can then set their own internal standards.

Even if your organization is not subject to GDPR, Rankin says, you can use it as a framework. “Use it as something to strive toward, so that in the future, if you do fall under California Consumer Privacy Act, you’ve already made strides,” he says. “Or if there is federal omnibus regulation [in the future], you’ve already made steps to comply with that as well.”

“We try to help people by transferring some knowledge so that they can continue to do this work” of better data management, says Busch. “It’s a continuous improvement sort of thing, learning how to work better. We sometimes talk about it as information hygiene, learning how to keep your files.”

Marts recalls working with one association where she trained volunteers on how to be helpful allies to people who have been harassed at meetings. At a conference, she served as a liaison for the volunteers, but the upside was watching the organization become empowered to take the lead.

“The feedback they got was tweet after tweet of people saying, ‘This is so fabulous, every meeting should have this,’” she says. “I think it did make a big difference. It’s really remarkable how quickly behavior changes once you put it out there that no, we’re serious about this.”

**MARK ATHITAKIS** is a contributing editor to Associations Now. Email: mathitakis@asaecenter.org
What skills will be increasingly essential for association consultants in the next five years?

**Peter J. O’Neil, FASAE, CAE**

*CEO*

**ASIS International**

**Alexandria, Virginia**

I see three inextricably linked skills that association consultants will have to master to make themselves as successful as they can be. First, making sure they understand the many moving parts and pieces of the association profession, not just the niche in which they may be an expert. Second, truly helping the client home in on specific, measurable success factors that will make their engagement a success. Third, endeavoring to help their client be accountable to themselves on the other side of the engagement by helping them develop an action plan at the engagement’s end.

**Sue Young**

*CEO*

**Sue Young Media**

**San Antonio, Texas**

Absolute clarity and brevity in our communication. Educated and experienced professionals often get tangled in their own stories, marketing, and conversations. Our collective attention spans are too short these days for verbose, self-serving, and muddled messaging. We must be able to distill our journeys and expertise into sound bites that are memorable and resonate. Potential clients who are confused will quickly move on to something else—perhaps a competitor’s website. Communicating in a clear and compelling way helps us develop the self-confidence to be more visible and impactful.

**Amanda L. Kaiser**

*Member Engagement Specialist*

**Kaiser Insights, LLC**

**Orefield, Pennsylvania**

As the business world continues to speed up, perhaps one of the most important skills consultants will bring to the association community in the future is energy. Often important projects falter or stop because of a scarcity of time; initial enthusiasm dims as daily, urgent work crowds every association professional’s to-do list. Consultants might spark an idea that can trigger an association to reach a long-sought-after goal. A consultant’s enthusiasm may be the push needed to get a project started. As the team champion, consultants can supply the mental fuel to keep a project going.

**Beth Brooks, CAE**

*Executive Director*

**Texas College of Emergency Physicians**

**Austin, Texas**

One skill that consultants need to hone is understanding the workload of the staff, especially at a small-staff association. At small organizations, when a new project is taken on, existing projects usually are not taken away from the staff, so deadlines need to be discussed. More important, the work to be done by the staff needs to be clearly explained. Don’t gloss over or say that something is easy and won’t take long to do. Be clear about the hours that will be needed by staff to complete each section of the project.
## Consulting Services Directory

**All listings in this directory are paid listings. Information was provided by each company.**

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- **Public Relations** | Media Relations | Media Training: [1]  
- Publishing | Media | Social Media | Digital: [7]  
- Web Services (Development | Design): Content Strategy: [2]  

### Financial | Insurance

- **Accounting** | Audit Services | Financial Consulting: [1]  
- Investment Consulting | Advisory: [1]  

### Governance | Strategy | Futures Thinking

- Environmental Scanning | Scenario Development | Futures Research: [2]  
- Governance | Board Development | Strategy Consulting: [3]  
- Leadership Development | Organizational Development | Ethics: [2]  

### Marketing | Membership | Meetings | Revenues

- Conferences | Planning | Logistics | Events: [5]  
- Expanding Markets (International | Partnerships): [1]  
- Fundraising | Development | Grant Proposal Writing: [1]  
- Marketing Services | Branding | Design | Writing | Sales: [3]  
- Membership (Recruitment | Retention | Renewal | Reinstatement): [1]  
- Nondues Revenue | Sponsorships | Affinity Programs: [1]  
- Research (Qualitative | Quantitative): [1]  

### Operations | Organization Management

- Executive Recruitment | Executive Coaching | Staff Development | Diversity: [1]  
- HR | Compensation | Benefits: [1]  
- Legal Services: [1]  

### Professional Development | Credentialing

- Certification | Testing (Individuals): [1]  
- Education | Training | CE Management: [1]  
- Professional Speaking | Facilitation | Speaker Development | Instructional Design: [1]  
- Standards Development | Accreditation (Processes | Organizations): [1]  

### Technology

- Cloud | Network Services: [1]  
- Data Analytics: [1]  
- Project Management | Virtual CIO: [1]  
- Strategic Consulting | Digital Strategy: [1]  
- System Selection Services (AMS, FMS, LMS, CMS, ETC.): [1]  

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| | GOVERNANCE | BOARD DEVELOPMENT | STRATEGY CONSULTING | • • • • • • |
| | LEADERSHIP DEVELOPMENT | ORGANIZATIONAL DEVELOPMENT | ETHICS | • • • • • • |
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| | EXPANDING MARKETS (INTERNATIONAL | PARTNERSHIPS) | • • • • • • |
| | FUNDRAISING | DEVELOPMENT | GRANT PROPOSAL WRITING | • • • • • • |
| | MARKETING SERVICES | BRANDING | DESIGN | WRITING | SALES | • • • • • • |
| | MEMBERSHIP (RECRUITMENT | RETENTION | RENEWAL | REINSTATEMENT | • • • • • • |
| | NONDUES REVENUE | SPONSORSHIPS | AFFINITY PROGRAMS | • • • • • • |
| | RESEARCH (QUALITATIVE | QUANTITATIVE) | • • • • • • |
| OPERATIONS | ORGANIZATION MANAGEMENT | EXECUTIVE RECRUITMENT | EXECUTIVE COACHING | STAFF DEVELOPMENT | DIVERSITY | • • • • • • |
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| | LEGAL SERVICES | • • • • • • |
| PROFESSIONAL DEVELOPMENT | CREDENTIALING | CERTIFICATION | TESTING (INDIVIDUALS) | • • • • • • |
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