

FALL
2020

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CONSULTING SERVICES

WAKE-UP CALL

HOW CONSULTANTS ARE HELPING
ASSOCIATIONS RISE TO THE NEW CHALLENGES
OF A POST-PANDEMIC FUTURE **6**

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SUPPLEMENT FALL 2020



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From financial planning to online learning to executive search, consultants have learned to pivot fast in response to the pandemic. They're helping their clients to do the same.

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A YEAR OF REINVENTION

BY DAVID MARTIN

Greetings, fellow association professionals! I think it is safe to say that at the start of 2020 no one saw the tumultuous year we would have ahead and the significant transformation associations would face. Organizations have felt the public health and economic impact of the COVID-19 pandemic, and they've been called on to consider how they can support a broad movement for criminal justice reform and racial equality. As consultants, we have found ourselves in the unique position of advising association clients on some of the same issues we are addressing within our own businesses.

In recent years, diversity, equity, and inclusion (DEI) have received increased attention in the association world. We have seen organizations address these issues more fervently and openly this year. Associations have been taking tangible steps to foster greater inclusion not only in their hiring processes, but also within their membership ranks. The services of DEI consultants are more sought-after than ever, and new positions are being created within organizations for directors of DEI.

At the same time, associations are addressing the operational and



financial changes brought on by the pandemic. Most spring, summer, and now autumn meetings have gone virtual, and many organizations are already planning for virtual conferences through mid-2021. The ASAE Collaborate forum has been filled with extensive conversations and excellent ideas about new approaches, recommendations for virtual platforms, and consultants' expertise. Staff, CEOs, strategy consultants, attorneys, and vendors have all stepped up to offer their ideas.

The pandemic has forced organizations to look at their operations from top to bottom, rapidly. Some are offering new membership models in an effort to bring in new members and encourage current members to remain involved. Any programs that were languishing but hanging on may have gone to the chopping block more quickly.

A whole new vocabulary has been introduced. Who knew we would be discussing "Zoom bombing," "Zoom fatigue," or "virtual happy hours"? It has been an exhausting seven months for almost everyone. Association staff members and consultants are living in an "always on" world. Managers are trying to be supportive and deal respectfully with the full array of their

employees' personal situations, as well as with the technical challenges of coordinating remote teams.

Associations are still sorting out the operational issues associated with remote work, but many are discovering numerous upsides to the arrangement. Among them are better work-life balance, less commuting time, *more* inter-departmental interaction, a smaller office footprint with possibly lower real estate costs, and access to a larger national talent pool. Many are evaluating how and when to safely bring staff back to the office, while some are discussing whether to go virtual permanently.

In this guide, you will find consultants with a range of expertise—everything from diversity and inclusion to information technology to business operations. They're here to support associations as they navigate these times, offering the knowledge and perspective needed to turn 2020's challenges into positive, long-lasting changes.

DAVID MARTIN, chair of ASAE's Key Consultants Committee, is CEO and managing partner of Sterling Martin Associates in Washington, DC. Email: dmartin@smartinsearch.com

The pandemic has forced organizations to look at their operations from top to bottom. Some are offering new membership models. Any programs that were languishing may have gone to the chopping block.

NURTURE THE RELATIONSHIP

A strong, well-managed relationship with your consultant will improve the chances that your project will succeed. It's worth the effort to build trust from the outset.

A partnership between an association and a consultant will be best positioned to achieve its goals when the two have a good relationship—and building one requires a little work.

"Any relationship you have is about trusting that provider with a key part of your association's opportunity for success," says Laurie Kulikosky, CAE, deputy director of the American Society of Transplant Surgeons. "Creating those relationships is really important. It's an actual ongoing relationship that you want to have, and that needs care and feeding from both sides."

A few key steps will help you establish a solid foundation for working together.

Start on the same page. Tim Hopkins, a senior consultant at McKinley Advisors, says it's important to set out with a shared understanding of the work ahead. "The initial kickoff meeting should have a list of questions from both the client side and consultant side, so you come to alignment up front," Hopkins says. "That provides clarity, and it allows for the client to ask questions that enable the consultant to showcase their knowledge and share similar scenarios they've seen in other organizations and begin to brainstorm potential solutions."

Kulikovsky agrees that a good start matters. "It's really important for your association to put in the work ahead of time to outline what you're looking to get out of the relationship," she says.

Cost is also an area where clarity is important. "When costs aren't clearly laid out in advance of the work, that can lead to a problem," Hopkins says.

Plan your next steps. "You've put a lot of time and effort into defining how to start the relationship, but perhaps not a lot of thought into how to continue it," Kulikosky says. "It helps to have a main point of contact and for that main point of contact to understand strategically what you want to get out of the relationship. Where do you see the work going? What does it look like at the three month, six months, or one year down the line?"

Remember everyone is part of the team. A commitment to collaboration will improve focus. "Treat the consultant as a member of your team, since they are on the outside looking in," Hopkins says. "It's important to bring them in and foster a level of trust so they can understand the true inner workings as best as possible, and that will enhance what they deliver in the end."

Communicate regularly. Keeping information flowing is essential to keeping the work on track and maintaining trust. "You can schedule regular check-ins so that things don't get away from you, so that the relationship doesn't get away from you," Kulikosky says. "Is there something new that is happening with the association? Having standing check-ins is helpful."

Hopkins adds that, for consultants, overcommunication is a good thing. "The last thing clients want is to be surprised by anything, especially when it comes to their expectations and needs," he says. "Overcommunication can lead to clarity, and that goes a long way in the success of a project."—**Rasheeda Childress**



FIVE SMART QUESTIONS TO ASK IN YOUR NEXT RFP



Requests for proposals are often more like obstacle courses than platforms for consultants to meaningfully show what they can do. Here are some questions to help you find just the right partner to meet your business needs.

No one is particularly fond of the RFP stage of a consulting project—from the association that develops and distributes it to the consultants who respond. But gathering and sharing information about a project and the expertise needed to accomplish it are critical early steps in any consulting relationship. So how can you make your next RFP more effective? George Breeden, CAE, managing director of nonprofit and association practice at Hartman Executive Advisors, recommends framing questions with the following prompts in mind to make sure you find someone who not only is qualified to help you get the job done, but also shows their problem-solving abilities from the get-go.

- 1 **What is your vision?** Instead of concentrating on the format of the RFP and asking consultants to jump through hoops, focus on what your organization is trying to do. Ask the consultant to provide their vision of how they would make that happen.
- 2 **What sets you apart?** Ask what is unique about the consultant and their company that is going to be particularly helpful to you in solving the challenges outlined in your RFP.
- 3 **What's your solution?** Again, focus more on what you are trying to get done and less on how you want it done. Outline the business problem you're trying to solve. Then let the
- 4 consultant tell you how they would solve the problem—not how he or she would manage your way of solving the problem.
- 5 **What's your story?** Give respondents the chance to tell their story and show what their core differentiator is—for example, by describing what they've done for other organizations that was particularly valuable. RFPs are often like grids, Breeden says. They adhere to a rigid structure that does not allow for much storytelling or personalization, and they often relegate descriptive answers to an appendix. Those narratives are critical and should be collected in the body of the RFP, he says.
- 6 **What have we missed?** Ask the consultant what questions you didn't ask in the RFP that you should have—and how they would answer. “The upside is you may get some innovative ideas even before you hire somebody,” Breeden says. You might not agree with it, but the response shows the consultant can be innovative in their thinking.
“You're looking for somebody who's going to be willing to push back and tell you that you should do some things differently, and maybe you're wrong about some of your assumptions,” he says. In a way, “you're asking them to consult for you before you even engage them.”—**Lisa Boylan**



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COOL IN A CRISIS

From financial planning to online learning to executive search, consultants have learned to pivot fast in response to the pandemic. They're helping their clients to do the same.

BY MARK ATHITAKIS



The COVID-19 pandemic hasn't changed everything about associations. They're still in the business of educating members and giving them opportunities to meet and network. But there's no question that the novel coronavirus has forced associations to act more quickly than usual to address lockdowns, remote work, and more.

Associations have traditionally relied on consultants to address issues that are beyond the scope of staff, and one thing the pandemic has revealed is that consultants' guidance is as essential as ever.

The shifts are visible in a variety of areas that rely on consultants' expertise. But they're particularly acute in finance, as associations scramble to manage (or dip into) reserves; learning, as meetings pivot to virtual and hybrid formats; and executive hiring, where the skill sets demanded of leaders have changed substantially in recent months. Consultant experts who work in all three of those arenas agree that it's critical for associations to adapt but also to stay steady and strategic, preparing for an environment that is likely to be radically changed even after the current crisis is over.

A FINANCIAL WAKE-UP CALL

The spring of 2020 delivered a double whammy to the finances of many associations. A stock-market tailspin erased years of above-average gains in reserves, while global stay-at-home orders and travel restrictions forced the cancellation of in-person conferences that are the biggest revenue driver for many associations. Those two impacts served as a much-needed wake-up call for associations to think about their financial safety nets, says Rob Olcott, FASAE, CAE, principal of the Olcott Group, a nonprofit financial consulting firm.

"Associations and other nonprofit organizations are being forced to take a hard look at their financial circumstances and will need to be more open to looking at strategies that they may not have looked at before," he says.

The conventional wisdom about the amount of reserves an association needs to have on hand is varied—recommendations run anywhere from three to 12 months of operating expenses. But a more productive conversation, Olcott says, is sparked when association leaders think about what their goals are, determine what risks are involved, and then set sensible savings targets. And though the pandemic was a quintessential "black swan" event that can't in itself be planned for, wise associations expect and prepare

for the occasional disruptive event.

"You might build a model which says, 'OK, we think once every 20 years there could be a 10 percent decline in attendance at our annual convention, and the dollar impact would be X. So we need to build that into our assumptions about the size of our reserves.'"

As associations work to get back to financial stability, A. Michael Gellman, founder of the consulting firm Fiscal Strategies 4 Nonprofits, recommends they narrow their horizons in the short term—think quarterly budgets, not annual ones. "I hope we can eventually abandon that—it's not a permanent thing," he says. "But it works for now in the pre-recovery phase, and it's driven by the fact that we're reacting to uncertain changing conditions. We can't do one-week budgets, but an annual budget is sort of meaningless in this environment."

But even once annual budgeting returns to something closer to normal, Olcott suggests that associations looking for financial guidance should ask consultants to deliver tailored approaches, and they should consider more than a firm's past performance.

"Groups selecting an investment advisor would ask in an RFP, 'What has your performance looked like over the past five or 10 years?' But there's a good reason for the disclaimer 'past performance is no guarantee of future results,'" he says. "Investment returns

over the next 10 years are not likely to match returns from the last decade."

LEARNING LESSONS

Just as associations have hustled to stabilize their finances, they've also rushed to shift their educational programming to online platforms. The abundance of free or low-cost options has been a mixed blessing in that regard. Zoom, for instance, is easy to use, but it's not the right format for every form of association learning, and Zoom fatigue is real.

Whether online or in person, education is "about designing experiences," says Josh Yavelberg, cofounder of Flying Cloud Solutions, an educational technology consulting firm. "And with any experience, you need to think about who the audience is, who you're bringing into the room, why you're bringing them there, and how you engage them."

The variety of online and mobile tools ought to be used to fit learning into members' busy lives. At Yavelberg's former association, the National Recreation and Park Association, he learned that many members were too on-the-go to sit still for a webinar. "They're maintenance workers, and they're not sitting in front of a computer all day," he says. "If you're not delivering content that's meaningful to them, they're going to go on YouTube and figure it out. So you have to focus

on mobile, microlearning, and trackable data that you can use.”

Some associations that were already familiar with online learning formats were nudged to implement them thanks to the pandemic; others got a hard shove. Either way, says Debra Zabloudil, CAE, president and CEO of education consultancy the Learning Studio, they’re discovering the upside of mixing their learning approaches.

“We’re finding that some of the programs that have gone from face to face to digital are actually better in a digital format,” she says. The challenge is to use the experience from 2020 to demonstrate the value of digital conferences in 2021, especially since many associations offered free or deeply discounted access to them this year.

To that end, Zabloudil’s conversations with clients start by exploring both formats and revenue.

“I want to know about their portfolio—how many conferences, how many workshops, how many live and digital events,” she says. “Where does the bulk of the revenue come from? And I want to know about engagement. It’s not just about what products we need and how we push them out, but what are the underlying philosophies around your education portfolio? And are you becoming more nimble and adaptive in how you develop and deliver content?”

STILL HIRING

Despite restrictions on travel and financial belt-tightening, associations are still pushing forward with searches for CEO roles and other top executive positions, says David Martin, CEO of Sterling Martin Associates, an executive search firm for associations. But search committees’ expectations of candidates have changed markedly, as has the search and interview process.

“There’s been more of an emphasis on crisis management,” he says. “Search committees really want to know if [candidates have] dealt with something major like this in the past, and how it turned out.”

Search committees are also looking for “new normal” skill sets, he says, like the ability to manage teams remotely and to be decisive on tough financial matters like cutting budgets

Consultant experts agree that it’s critical for associations to adapt but also to stay steady and strategic, preparing for an environment that is likely to be radically changed even after the current crisis is over.

and instituting furloughs and layoffs. But because the stakes are higher, many committees are anxious about hiring a leader they haven’t had an opportunity to meet in person. So Martin’s firm talks with them about adding layers to the process to provide more assurance.

In some cases, clients have held “social” Zoom calls with candidates in addition to more formal interviews to get a better sense of cultural fit. And that’s meant that the candidates have had to improve their virtual-interviewing game as well, Martin says. His firm also coaches job seekers, and he advises them to have mastered their Zoom 101 skills, lest they look unprepared for virtual management. His top tips: Don’t be confused about audio, video, and screen-share settings; think about the lighting in the room where you’ll be interviewed; and look into the camera, not at the screen, when you’re speaking.

Some clients, Martin says, are looking into safe ways to conduct hybrid interviews, where early rounds are handled online but final ones are done in person. Such discussions about process turn on feelings about the candidates as well as the comfort level of committee members; one of them might have to be recruited for a socially distanced walk-and-talk or meal.

Bottom line: Associations are still sorting out how to be confident not just in their next major hire, but in the process that led to it.

“It’s hard to say there’s a best practice yet,” Martin says. “Both the organizations and search firms have had to be flexible and adopt new approaches quickly. We’ve all had to make it up a little bit as we’ve been going along.”

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Willow Marketing is a full-service marketing and communications agency helping associations nationwide tell their stories, connect with stakeholders, and create better member experiences. With three decades of experience working with associations, we understand your industry—and our research is leading the way. Explore our association attitudinal survey findings: <https://willowmarketing.com/associations-survey-results/>.

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