



THE BUSINESS AND STRATEGY OF ASSOCIATION EDUCATION

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In the world of association education, many competing demands exist. Members want products and services that meet the need of their current professional challenges, and they want you to anticipate what they will need next. And that was before COVID-19. Now, with the significant change of landscape in which we operate as association professionals, we are more pressed than ever to be relevant to members, but in a whole new way. The sand is shifting underneath ALL of our feet.

Consider what your members are currently experiencing:

- Some have lost beloved jobs.
- Others may have to leave the profession to take a job in another industry.
- Everyone is feeling stress due to the significance of the unknown.
- Planning is difficult because we don't truly know what the next month or quarter will bring.
- Some have had health issues, or have even experienced losing someone they love.

While we don't know what is ahead, we do know the road won't be easy. But that is why we lead. We lead because our members need guidance, resources, and direction. We lead because we can make a difference in the lives of our members through education, advocacy and so much more.

So where do we begin? Strategy. There really is nowhere else to start. Whatever strategy you had in place in February 2020 *must* look different than what you have now. Some of you may be thinking, "Who has time to strategize? I can barely keep my head above water!" Of course. We were all in a phase of *doing* through most of March, April and May. We had conferences that needed to be cancelled, postponed or moved online, technologies

to learn, budgets to adjust and more. But now we must strategize.

The way we educated our members likely looks different during the summer of 2020. Associations that were dragging their feet into the online world had to learn and acclimate quickly, as did their members. Associations that have been working with digital education for some time may find themselves ahead of the pack.

But we need a path forward, so let's examine what we need to be considering right now.

Be Deliberate

There are no absolutes for what "every association" should or should not do. All products, services and practices must be run through the lens and culture of your specific association, and the industry that it serves. Some associations have a greater appetite for innovation and risk. No matter your culture, being deliberate in your decision making and backing that up with actions that support those decisions, are critical. Anything less is sloppy. Anything less is lost opportunity.

As an example, many associations made decisions during the months of peak COVID to offer educational programming at no cost. Some even offered education at no fee to nonmembers and other

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constituents. Why? Because it was the right thing to do. What does that do for the bottom line? Not much in the short term, but goodwill goes a long way when times are tough for an industry (or nation, or world). It also shows leadership, because leaders truly emerge during the difficult times. But all decisions have consequences. Consequently, your next decisions might need to be: When do we start charging again? How do we invite those nonmember participants under the tent? What might we continue to offer at no charge for our members (and perhaps others) to help them get back to business in a way that is financially sustainable for us? Which brings us to the next consideration. . .

Understand Your Audience

Now is the time to get clear on who you are serving. Associations can lose track of what their membership looks like over the years, and association folklore can take over if you aren't regularly or constantly collecting and analyzing data.

One of the most important things education professionals can arm themselves with is demographic data about the members and nonmember customers for your education (which might be two different sets of demographics). It is powerful to start an Education Committee meeting (or conference design meeting) with demographics on who the program serves. Minimally, you should understand the following about your membership:

- Years as a member
- Years in practice
- Level in their organization, if appropriate
- Job title or job function
- Age range
- Geographic region

Of course, there are always other elements you may want to capture and understand as well. If your association AMS does not capture this information, or if it is incomplete, ask the right demographic questions on your next member needs survey or, better yet, on your next education needs survey. If you want to further understand demographic preferences, include those questions on your program surveys as well.

Understanding demographics is powerful, particularly after cross-tabulation, which helps the organization to truly understand its member and market niches.

'No Margin, No Mission'

These four words have stuck in my mind since reading them, attributed to Sister Irene Kraus, founding chief executive of the Daughters of Charity Health System. Wise words. And we should know this as association executives, because we prepare budgets, watch attendance figures and look at member retention rates. We need revenue to operate and it is that revenue that allows us to keep innovating and to keep developing relevant products and services for our members.

As we look at education products, we must deliberately look at our revenue streams. A hard lesson that many have learned during COVID-19 is that it is critical to have diversified revenue streams in any association. Far too many associations have lost the only real revenue source they had when their annual conference cancelled and have had to rely on reserves or an insurance policy payout if they were lucky to be covered for this spring's events.

That means developing a variety of content areas, aimed at a variety of audiences and with varying formats. Is it difficult to see revenue off one webinar, or one podcast or a virtual panel discussion? Create a series of offerings in any given modality and offer that to members with a price tag or sell sponsorships.

Combine a deliberate strategy with a solid plan for developing additional revenue streams, and you are on your way to a solid educational portfolio. Once these important elements have been determined, you must share the plan and execution strategy with staff, committee members and the board. Members need to understand the need for a strategy based in reality, and the need for revenue. Too many associations shield committees from these realities, and that works against the mission in the long run.

Sponsors

There is an interesting dynamic in sponsorship right now: sponsoring companies are also hurting financially due

to COVID, but have seen their sponsorship opportunities dry up before their eyes. Without being able to see customers in person (either through industry events or sales calls) many are looking for ways to be in front of decision makers. While every industry and association will be different, don't discount sponsorship just because we are in difficult times. Keep the lines of communications open, float new and interesting digital opportunities before them and try to secure sponsors in different and unique ways.

There are many associations that have historically not pursued a sponsor that didn't have \$20,000, \$30,000 or even \$50,000 to spend. Release yourself from the thinking of the past and really determine what will work in today's environment. You may find greater success with smaller sponsorships. Of course, there may need to be more of these to meet the same revenue levels, but it keeps sponsors active and engaged during a difficult financial time. We may have to work a bit harder for this financial support than we have in the past.

Know Your Education Program Statistics 'Cold'

There is nothing more deflating than watching a group of well-meaning individuals make bad decisions over and over. Why does this happen? Not because they don't care or are working against the needs of the association, but typically because they don't understand what has come before. Being well armed with program data (coupled with the demographic information above) will help any committee or decision-making group jump off at a point of clarity and fact.

We need to look at data to help inform decisions. Don't say, "we tried that before and it didn't work" and take it off the table. Say instead, "for the last five years we have had programs on that topic that didn't draw significant attendance. Has something changed that might make this area successful this year?" If yes, further thought and discussion ensues. If no, you have your answer and it is defensible to your C-suite, the board, committees and the members overall. Projects that linger on too long with waning financials and attendance are a drain on the organization

overall. Should the membership dues of some of our members be used to support a failing program or a pet project of a board member? Again, with data on our side we can make the right decisions and they become defensible.

Data is also powerful when working with sponsors, finding collaborators and negotiating contracts with industry partners. It might be the difference between being able to show the power and reach of the program, or losing an important opportunity.

Differentiate Learning Opportunities for Members

Variety is the spice of . . . associations. Members can get bored with the same offerings looking the same way all the time. Try new things! One of the gifts that COVID-19 has given us is that all bets are off. It is not business as usual and we are expected to be inventive, nimble and curious. Members are very forgiving during a crisis. They understand the world has been shut down, so why not allow

your association to re-emerge as a more creative and member-centric version of itself? What does this mean?

- Do not cling to processes and methods of the past.
- Try new things, even if you are unsure of the outcome.
- Create a new product series, through podcasts or micro-learning, and brand it with its own unique look, feel and marketing.
- Attempt a virtual conference if you have not already—there are so many options and platforms to consider that there will likely be one to fit the size, scope, and complexity of your event.
- Shorten development timelines—force yourself to meet the needs of the market faster than you have before.
- Consider new partners and collaborators.

No matter where you stand today, or how rough the past few months have been, all associations can continue to meet member needs in all new ways in

the months ahead. Deliberate strategy, executing on that strategy, trying new products and services, and keeping your eyes on your customer base will help you keep your member education game strong. 📖

1. Be deliberate.
2. Understand your audience.
3. “No margin, no mission.”
4. Sponsors.
5. Know your education program statistics cold.
6. Differentiate learning opportunities for members.

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