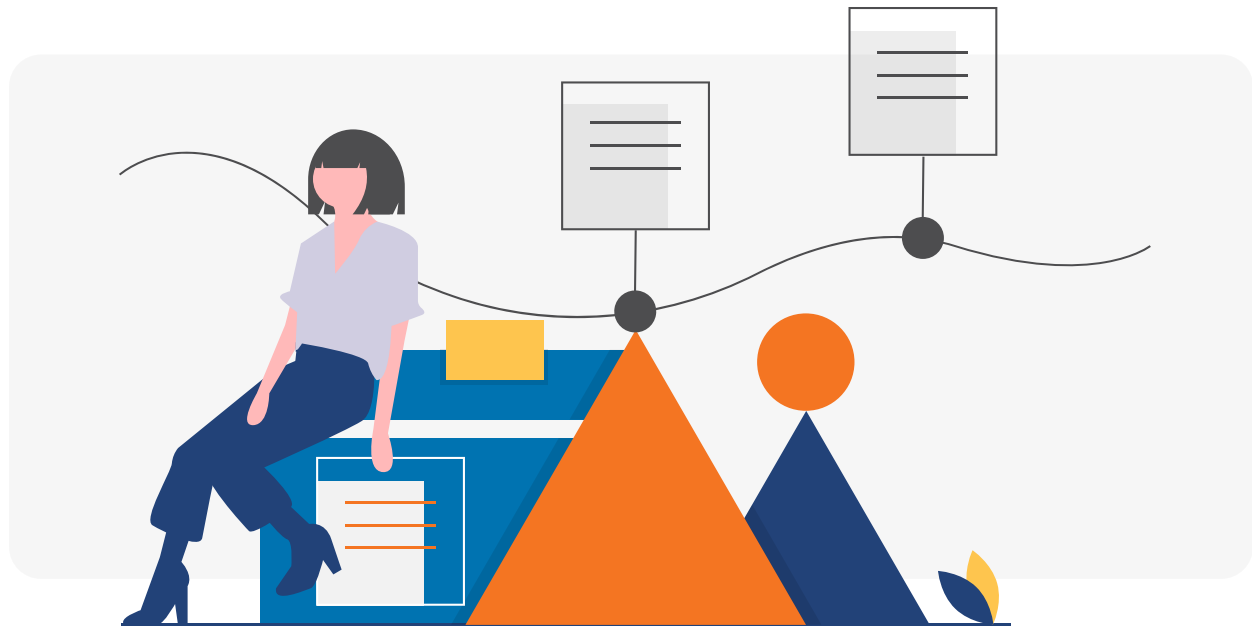


# TPG Pulse For Associations

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## Association Strategy in Times of Crisis

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"When in the midst of a crisis, it can be so hard to think and act strategically. But it is critically important. We cannot spend our days rushing from fire to fire in the backyard while oblivious to the inferno on the doorstep that will surely burn the house down."

As we near the end of our second month of social distancing in Canada, the world around us has changed in ways most of us thought impossible.

Many communities across Canada and globally have yet to see the 'peak' of Covid-19 and there are a range of predictions on when communities may see a light at the end of the tunnel of this crisis. Countless businesses and entire industries have seen work grind to a halt. The immediate economic impact of the pandemic is unprecedented in modern times, with the longer-term fallout as yet undetermined but sure to be significant.

The impact on associations these past few weeks has been swift. Revenues for many have seen a dramatic drop as conferences and face to face events have been postponed and cancelled. Membership renewals have stalled, with many allowing members to defer payment until the situation has stabilized. Historic numbers of layoffs and business closures have had a trickle-down effect on associations and their ability to serve members and sustain operations.

In other words, we are in the 'thick of it.'

When in the midst of a crisis, it can be so hard to think and act strategically. But it is critically important. We cannot spend our days rushing from fire to fire in the backyard while oblivious to the inferno on the doorstep that will surely burn the house down.

Below are some of the initial steps and strategic considerations we have seen our clients and colleagues addressing head-on over the last few weeks, along with some of the big questions that must be tackled next.



## Leadership and Decision-Making

**Creating 'Command-Central':** A key response for some associations in the early days of Covid-19 has been to flatten the organizational hierarchy and to remove red tape in order to enable nimble response and adaptability. Whether it is the Executive Committee or a new task force to lead the organization through the weeks and months ahead, associations need a 'Command Central.' This should be a small, cross-functional team with the ability and autonomy to lead rapid response to the situation as it continues to develop.

**Nimble Strategy:** For now, the strategic horizon is necessarily much shorter than is typical. Specifically, the immediate focus should be on what needs to happen in the next 30, 60 and 90 days to ensure the continuity of the organization, and the timely delivery of relevant member support and services.

Regarding the evaluation and selection of strategic decisions, scenario-planning (worst-case, best-case and middle-of-the-road scenarios) has been helpful for some in quickly evaluating the potential risks and rewards of different decisions and options at hand.

Looking at decisions from the perspective of risk analysis may also be helpful during this time. Specifically, associations should consider the short, medium and long-term risks of different potential strategies within the context of:

- a. Their membership;
- b. The broader profession or industry they represent; and,
- c. Their organization (Finances, Human Resources, Brand, etc.).

### **Data and Information-Based Decision-**

**Making:** Though it may be tempting with so many conflicting and urgent priorities to be addressed, associations must continue to make decisions that are informed by timely and reliable data, for example:

- a. Impact data to understand how the industry or profession has changed, and what might be in store over the coming months;
- b. Organizational performance metrics, including financial indicators, as well as data in areas like member renewal, growth and engagement, program and service penetration etc.; and,
- c. Member needs and perceptions: This can be collected via short and frequent member polls or surveys and (if resources allow) individual outreach.

### **Communication and Engagement Strategy:**

Keeping members and other key stakeholders in the loop and up to date on the realities of the situation at hand has been a critical priority for many associations. Frequent and authentic communications, along with opportunities to engage (for example through webinars and virtual open meetings), must focus on supporting members and working collaboratively to help address immediate and pending problems and challenges.

## Strategic Focus

Within the consistent frame of the broader vision, mission and guiding principles, the focus for most associations in the near-term will be to ensure:

- a) That maximum available support is provided to members and the profession or industry they represent; and,
- b) The sustainability and continuity of their organization.

Never has there been a more important time to 'do a few things and do them well.' Associations are realizing that this is no time for laundry lists of tasks or pet projects that don't have strategic value.

In deciding where they should – and where they should not – focus their time, effort and priorities in the coming weeks and months, associations must consider that the organization's long-term strategic vision, mission and overall strategic priorities will likely not change because of Covid-19. These should continue to serve as a high-level guide in strategic direction and priority setting.

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- d. That maximum available support is provided to members and the profession or industry they represent; and,
- e. The sustainability and continuity of their organization.

These are each addressed below.

### Providing Support and Services to Members During Covid-19 and Beyond

Members need many of the same things from their associations as they did before the pandemic, just with a different and more urgent focus. For example:

**Advocacy and Government Relations:** Whether it is ensuring members get the emergency business and/or employment support they need from the government to keep their businesses afloat, or whether they are fighting to ensure their members get the Personal Protective Equipment they need to stay safe while on the front lines, the value of advocacy and government relations has never been greater.

### Information, Resources and Support:

Associations are uniquely positioned to help members understand and help them to navigate the professional and industry-related challenges they are facing today and in the coming months through the delivery of timely information, virtual education, advisory services and support, and other resources.

**Networking:** Associations are still, above all, the great connectors of our society. Connecting members and stakeholders to each other (albeit virtually for the time being) to facilitate collaborative action on common challenges, and to connect members to others who can help them in various ways to rebuild, regroup, and/or refocus their lives, professions and businesses, is a significant benefit.

### Ensuring Organizational Sustainability and Continuity

In order to continue to support, and in many cases enhance the service they provide to members, associations need to keep the lights on. Below are some immediate and near-term considerations as it relates to organizational sustainability and continuity in the coming weeks and months:

**Human Resources:** An immediate focus for many organizations has been shifting its workforce to operating virtually. Even if some or all of an association's staff already work remotely, association leaders will be thinking about some of the following:

- o Contingency planning if key staff and/or volunteers get sick and/or need to be gone for an extended period of time;
- o Creating parameters for staff working from home/delivering work while many also deal with childcare, home schooling etc.; and,
- o Mental health concerns for staff and members in isolation.

**Programs, Services and Events:** Immediate considerations for many associations have of course included the impact of cancelled in-person events and/or retooling programs, services and events to be offered virtually. In addition to the obvious financial and logistical implications, an immediate priority for many associations right now is to ensure the technology and bylaws are aligned to allow for the Annual General Meeting to take place virtually.

**Finances:** In addition to evaluating the immediate and near-term anticipated impact on the association's finances and operating realities from Covid-19, scenario planning can be helpful to understand the potential implications from different potential eventualities and strategic decisions. Among the impact areas to be thinking about are some of the following:

- o Different potential levels of membership decline and attrition;
- o Impact of allowing members to defer or temporarily reduce membership dues;
- o Impact of deferring or cancelling programs, services, events, and/or moving some of this online;
- o Financial impact and legal implications of a scenario where staff resources are reduced (e.g. layoffs, payouts, etc.); and,
- o Considering and evaluating what avenues may be open to the association to ensure its viability in the coming months, for example, government programs and subsidies, working with allied organizations and partners, etc.

**Technology:** Immediate questions will likely centre around how to continue to leverage technology to stay connected and engaged with staff and members through a period of social distancing and isolation. Additional immediate considerations include some of the following:

- o Ensuring staff have access to the technology needed to do their jobs;
- o Keeping data and information secure; and,
- o The longer-term implications of the current mandated shift to virtual service delivery and how this may impact an association's programs, services and operations going forward.



## What Comes Next? Retooling to Thrive

There are really no words to describe the impact the last few weeks have had on associations and their constituents - Heartbreak seems fitting as we have watched so many of our colleagues, clients and friends, along with the professions and industries they serve so passionately, bear the impact of Covid-19 head on.

If the past few weeks have been hard, the coming weeks and months will be even harder for many associations as the fallout continues. Some associations will find ways to adapt and survive. Sadly, others will not. It remains to be seen what the association sector will look like when all this is said and done, but I think most will agree it will be very different from what existed a few short weeks ago.

None of us pretend to have the answers to all of the questions associations are facing today but we want to help uncover them with you as we navigate this untravelled road together. In the coming weeks, TPG will be collecting data, and providing information, insight and guidance where we can. We'll do this by publishing a series of free resources that track the impact of Covid-19 on the association sector and that delve into how associations are adapting, retooling, and refocusing not just to survive, but hopefully to thrive, in our new reality.

As a first step, please watch your inbox and our social media over the next few days for a link to our inaugural monthly Pulse survey which will focus on collecting data and providing insights that will help Canadian associations make better decisions in the coming weeks and months. For more information please contact [research@portagegroup.com](mailto:research@portagegroup.com).

The Portage Group is a full-service consulting firm serving the association sector. TPG is the official research partner for the Canadian Society of Association Executives.

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