

BENCHMARKING and BEST PRACTICES for ASSOCIATIONS

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**National Library of Canada Cataloguing in
Publication Data**

*Pealou, James B., 1948-
Benchmarking and best practices for associations*

Includes bibliographical references.

ISBN 978-0-921998-24-2

Product Code 1317s

*1. Benchmarking (Management) I. Canadian Society
of Association Executives. II. Title*

HD62.6.P43 2001 658.4'013 C2001-901640-9

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Fifih Printing – 2010

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Printed in Canada

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and consistent with standards of good practice in the association
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applicability of any recommendation in light of particular situations
and changing standards.*

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PREFACE

Benchmarking type activities have been around for a long time. Individuals and organizations constantly look for new and innovative ways to improve what they do. In reality, some are more active at benchmarking and some are more sophisticated in their approach. Benchmarking has been thrust into the spotlight in the last few years as individuals realize that organizational success through quality improvements is often linked to results from benchmarking of best practices. Despite its success, some have yet to invest in related education and training. Some think benchmarking is simple comparison. Others think they are unique or that an attitude of continuous improvement is missing in the association. Others believe it is not part of their job.

The private sector has latched on to benchmarking slowly. Many larger organizations such as IBM, 3M, Kodak and Xerox have been active in this area for some time. The third or not-for-profit sector, other than some health facilities, schools and municipalities have not taken advantage of benchmarking. The association component of the third sector has been extremely slow to embrace benchmarking. Some claim they do not know much about it, have no time for another fad, or know about it but cannot get around to doing something.

A survey about the status of benchmarking was sent out to 30 leaders in the association community. Three individuals responded. Of the three, one said there was no time, the others said they would like to use benchmarking and wanted to know more about it. Further telephone follow-up with most of the non-responding individuals revealed that

many association managers do not understand benchmarking or the value it can bring. When advised that a listing of association practices was available most were delighted and wanted to see them. While they appreciated the fact they were available on the Canadian Society of Association Executives website they indicated this was information that also needs to be handy and available in seconds. They do not always have the time to log on.

Despite limited formal involvement by the association community in benchmarking to best practices, the value of best practices is appreciated. The seeking out of best practices often occurs through conferences, seminars, publications and networking. Unfortunately, not all managers in the association community have the resources or time to engage in traditional methods of seeking out best practices.

This book will inform those in the association community about benchmarking and provide them with access to over 200 practices that will save associations time and money, and improve the quality of association activities.

Information is presented in three sections. The first provides information on benchmarking and links in standards and performance indicators. The next section lists sample practices. The practices are classified and presented in a format based on the Canadian Society of Association Executives Association Management Competency Standards. The third section includes examples and sources of information to provide guidance and additional knowledge to those planning to undertake a project.

ACKNOWLEDGEMENTS

Many individuals have contributed time, energy, ideas and suggestions for this book. I wish to thank them for seeing the big picture and understanding the positive impact this information can have on the association community.

Special recognition is due to the following individuals who provided valuable assistance with research in developing many of the practices listed: Keith Lancaster, Susan Pugh, Ian Anderson, Earl Manning and Tom Hebert. Thanks to Deborah Foster-Stahle, Denny Kobayashi and Wendy Wong for contributing examples.

I also want to thank CSAE staff for their commitment to a vision in which the development of knowledge to support continuous learning is seen as an investment.

And finally, my deep gratitude to my wife Marian for supporting my quest to enhance the quality of activities in the association community and for her ongoing encouragement.

James B. Pealow



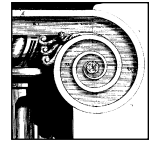
BENCHMARKING and OPPORTUNITIES



Section One

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CANADIAN SOCIETY OF ASSOCIATION EXECUTIVES
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High Performance Associations and Benchmarking

Associations are under pressure to provide high quality services to members at levels beyond their capacities. Meeting member expectations will occur only if associations ensure that their performance is high calibre.

Individuals and organizations have been settling into a new working environment in which a culture of continuous improvement prevails. This new culture comes with an attitude of “what can be improved so we can be more efficient and effective?” Organizations which fine-tune their efforts and benefit from improvement results are starting to stand out from the rest of the pack.

What is a high performance organization? This is a tough question to answer, but it is getting easier as analysis is conducted on those organizations at the top of the heap. One description suggests a high performance organization is:

“An organization which can respond to the demands of its marketplace within a reasonable time by producing a superior product, receiving both customer and employee satisfaction and yielding a reasonable profit.”

Individuals studying the success of these organizations have classified them as high performance organizations. Information from my study of information on high performance organizations and, in particular, associations, indicates they all share similar characteristics.

Key Characteristics of High Performance Associations

1. Vision and mission of the association are shared and owned by all stakeholders.
2. Strategy is performance-based, clear and mapped to ensure individuals and members of teams turn vision and mission into action and results.

3. Goals are challenging and make a difference to the way in which work is completed.
4. Teamwork is effective and empowered.
5. Better business practices are used to secure efficient organizational practices which are driven by focusing on member and employee satisfaction, fiscal and operational accountability and on quality.
6. There is a strong emphasis on performance measurement using key performance indicators.

To become a high performance association, all key stakeholders must have a powerful and strong commitment to the vision, mission, strategy and goals of the association. Communication lines within the association must be effective and clear. A culture of performance improvement must exist in which everyone wants to meet the challenges set and wants to engage in levels of change beyond fine-tuning, tinkering or incremental adjustment.

Associations are delighted if they are considered high performance. In fact, recognition is part of the reward for pursuing a rigorous course that requires determination, investment and commitment. What ever is accomplished by high performance association needs to be regarded as outstanding.

The first two key characteristics call for an association to have a strategic management policy and supportive processes. Strategic management is a formal planning process that allows an organization to pursue proactive rather than reactive strategies. The activity in strategic management is dynamic and continuous. Strategic management is key to becoming a high performance association. Those who use it often say that the process is a more important contribution than the actual plan.

Benefits of Strategic Management:

- Innovative and creative activity is encouraged.
- The change process is made easier.
- Helps align individual effort within the association and improves communication.
- Greater understanding, commitment and a cooperative approach toward problems and opportunities are generated.
- Decision makers are better informed; better decisions are made and resources are used effectively.

Strategic management consists of three stages and involves the following activity:

Strategy Formulation

(What is our business and what business do we want to be in? What could we do and what are we able to do?)

- develop a vision and mission
- understand the values to be applied
- determine internal strengths and weaknesses
- identify opportunities and threats
- understand issues influencing the association
- understand success factors and goals
- establish long-term objectives
- generate strategies
- select strategies to pursue

Strategy Implementation

(Where the rubber hits the road!)

- provide policy support for selected strategies, related tactics, applied objectives and resources
- financial capacity
- Board of Directors' support
- appropriate organizational structure
- being prepared to alter current practices and behaviour
- human resource motivation, ownership, commitment and understanding

Strategy Evaluation

(Measure and evaluate performance)

- assess how well strategies are doing
- measure performance to key indicators
- identify areas where corrective action is necessary
- assess impact of change subsequent to initial strategy formulation

- decide about abandonment, adjustment or development of new strategies

Key characteristic three requires individuals to understand “if you do what you always do, you will get what you always get.” There are organizations that are living what is referred to as a business definition of insanity “doing what you always do and expecting different results.” Setting stretch goals will make a difference in the way in which work is done and in the results. Developing and applying stretch goals requires that individuals and teams are rewarded. Individuals often imply, “Tell me how I will be rewarded and I will show you how I will perform.” This applies to teams as well.

Key characteristic four applied successfully means that education occurs on an individual and team basis. It also means that actual activity and results have convinced individuals that teamwork will:

- increase productivity
- improve communication
- make better use of resources
- improve creativity and efficiency at solving problems
- make higher quality decisions
- result in better quality products and services
- improve work design and processes
- bring valued diversity
- accomplish work that ordinary groups cannot do

A feeling of “We are all in this together” prevails. With each success comes greater autonomy and decision making authority.

Under strategic management individuals and teams possess or are working on their change management skills and are adaptable to change. They also seek to develop broad skills based on required competencies and are capable of handling multiple responsibilities. Emphasis is placed on market-driven innovation, and research is sought to assist with decision making.

Key characteristic five means an organization pursues continuous improvement that is focused. Methods of setting the focus and achieving improvements may vary. A number of tools are being used to support continuous improvement activity such as balanced scorecards, total quality management programs, activity-based management and compliance to ISO standards. Benchmarking and best practices are a key component in the implementation of many other tools.

The sixth and last key characteristic is a vital component of all the other characteristics. Performance measurement using key performance indicators is a necessary ingredient to engage in continuous improvement activity. “If you can’t measure it, you can’t manage it”. By measuring the situation, adjustments can be made and results recognized and rewarded. A broad sharing of information throughout the organization occurs. The key performance indicators are front and centre and used for benchmarking.

Continuous Improvement

In business circles, use of continuous improvement as a formal process is a relatively new phenomenon. Increasingly, high performance organizations in both not-for-profit and for-profit sectors are recognizing the need to integrate continuous improvement philosophies and practices into their operational strategies and plans.

The use of continuous improvement is not confined solely to manufacturing operations. Increasingly, the same practices and philosophies are finding their way into service industries. The application of continuous improvement within an association represents a movement toward leading edge thinking.

Some organizations approach continuous improvement through a continuous quality improvement (CQI), total quality management (TQM) program, process redesign or activity based management. Other organizations do not adopt a particular program but try to instill the concept of continuous improvement into the culture of the organization. If continuous improvement thinking and action prevails, increased quality will surely result.

Continuous improvement processes generally have these common characteristics:

- Identify and define the problem.
- Study the existing situation and get the facts.
- Develop possible solutions for the situation.
- Evaluate solutions and select the desired one.
- Implement the solution.
- Evaluate the solution results.
- Revise, if necessary, and start again.

Benchmarking

When going through a continuous improvement process, benchmarking is often used. As a tool, benchmarking is valuable and is necessary if you expect above average results; it is becoming one of the key management tools used to make a

difference in quality, service, member satisfaction and results. It is an integral part of planning, implementing action, and continuous improvement reviews.

Benchmarking is the continuous process of measuring products, services and practices against competitive or similar associations, or those of “best in class” organizations (which can be from an unrelated industry). Benchmarking involves the measurement and comparison of a function or process against similar functions or processes. It may involve looking at high-performing, for-profit organizations or at leading associations in any country in the world.

As an example, an association may choose to benchmark the performance of its membership sales department’s response to a telephone inquiry to that of a mail order merchant. It may choose to measure the amount of time it takes for the call to be answered and the time involved in either processing a telephone application for membership or a request for information. This process can be compared against a mail order store that is asked to fill an order (on the phone) or to ship a catalogue to a prospective customer. Studying the results of this comparison and seeking areas for improvement is just one example of a possible continuous improvement activity. In this situation, you may find the mail order store has a performance indicator dealing with response time at 48 hours, where the association performs this function once a week.

Formal benchmarking goes beyond knowing what others do and what their indicators are, to understanding what others do and learning from their practices.

Some will argue that the management of an association is unique and that performances cannot accurately be compared with for-profit entities. The line between for-profit organizations and associations has become less defined in the minds of many members. Association members are not prepared to accept a lower level of performance simply because the organization in question is not a profit-seeking entity.

Associations often think they have the best practices until they use benchmarking. Benchmarking requires users to be humble enough to admit that someone else is better at something and to be wise enough to learn how to surpass them at it. Benchmarking allows you to take innovative practices and make them fit to your association. Benchmarking can be applied at the strategic, functional and operational level. Benchmarking, if used properly, will result in various process improvements and an understanding of changes necessary to facilitate improvements.

Benchmarking can save a lot of time and trouble, and I believe it is critical for associations with limited resources to not spend time and resources reinventing something that already exists.

Phases of Benchmarking and Related Activities:

1. Planning and Organization

- Select and prioritize what is to be benchmarked.
- Establish and organize the benchmarking team.
- Select benchmarking measurements to be used.
- Identify comparative organizations.

2. Information

- Document own work processes to be benchmarked.
- Determine data collection method and collect data.

3. Analysis

- Determine current performance “gap”.
- Identify causes for gaps.
- Project future performance levels.

4. Implementation

- Communicate benchmark findings and gain acceptance.
- Develop action plans based on performance goals and objectives.
- Implement specific actions.

5. Evaluation

- Monitor and assess progress towards goals and objectives.
- Recalibrate benchmarks if necessary.

1. Planning and Organization

At least half of the total effort on a project should be spent in this crucial phase of the benchmarking process. This is primarily due to the need to select and prioritize projects, get the team ready, define the measurements and identify the organizations to be benchmarked. Projects selected may be generated through brainstorming or specified by leadership in the organization. Possible projects should be weighted against the organization's strategic intent and current critical success factors.

The benchmarking team should include representation from the persons who are most knowledgeable about the process and will be directly affect by changes due to bench-

marking. In addition to knowledge, individuals on the team need to have credibility, communication skills, be flexible and open to change, be a team player and have the interest or motivation. The team leader or facilitator must have good project and people management skills.

Measurements are often expressed as ratios or percentages and are the key gauges that are used to uncover new best practices. Knowing these in advance allows the benchmarking questionnaire to seek out information supporting a measure. Many organizations measure activity in terms of quality, cost and time from a customer perspective or organizational critical success factors. Where it is not possible to develop an appropriate measure the team can identify key learnings using a case study approach.

Identifying organizations to be benchmarked is often a difficult task. It need not be if the team remembers that the organization does not have to be considered successful to have a good process in the area of benchmarking under study. To find the best, many sources have to be used, such as customers, consultants or associations. Developing a potential partner profile will assist in selecting partners based on operational or other variables that affect the implementation of best practices. A Best Practice Matrix can be used to narrow down the list of potential partners. Scores from the matrix will help determine which organizations should be examined or visited. The list can be narrowed by factors such as cost, time, willingness to share information and similarity of functions being benchmarked. An example is provided in Chapter 9 – Example D.

2. Information

The team must understand the proposed benchmark process and look at all factors that affect it. This means documenting the existing process. The documentation may reveal immediate potential improvements. As benchmarking is an exchange of information, this information is needed to share and help calculate the gaps that exist.

Before planning to do an original study and setting up a site visit with a benchmarking partner, look at internal and external public sources of information. An employee may have access to information on a partner's process or it may be in a public database, from a former employee or a benchmarking clearinghouse. If these sources do not meet the information needs original information gathering is required. Information gathering should be supported by a questionnaire or means which will provide focus and if necessary

provide for anonymity. Benchmarking is legal and to avoid problems use the Benchmarking Code of Conduct provided later on in this chapter.

3. Analysis

The intent of the analysis is to determine why the partner benchmarks are superior and what practices are used to achieve them. Trying to understand practices that lead to the superior performance is a lengthy process and can take up to one third of the project time. Having access to the practices provided in Section 2 will save a lot of time and effort. When the performance gap has been identified it is then necessary to estimate what the benchmark performance should be over the next few years. If there is no gap the challenge is to keep it that way or improve upon what is being done. The future performance projections should take into account the difference resulting from the new practices as well as other trends and issues such as the use of technology.

4. Implementation

The quality of the project report plays a key role in getting approvals to implement recommendations. The report should include information on the team profile, the project objectives, current situation, partner selection, findings and analysis of the gap, action to support new performance goals and objectives.

Once approval has been obtained the action plan for implementation must be shared with all key stakeholders explaining roles and responsibilities. The team as a whole may oversee implementation or may assign responsibility to one or more team members.

5. Evaluation

Ongoing evaluation to the action plan and projected measures is required. Those assigned will monitor and assess progress. Reports should be provided to the team and other key stakeholders. Adjustments may be needed to deal with implementation issues.

While implementation was occurring some other organizations may have developed new practices that have increased their performance level even further. It is necessary to make this determination and update benchmarks if necessary and start a new benchmarking project.

The benchmarking process helps you to know your association, understand its competition, define the best

processes and integrate them into your business activities. The above steps provide a systematic framework for the association to continuously focus on performance and sustainability. It is a process that can be entered into as a strategic activity targeted at analyzing specific function areas within the association to determine required changes and/or adjustments. It can also be used to embark on a major review of the total operation, as part of a strategic planning or as an operational review process.

A benchmarking project will help identify what to change. It will be necessary to consider how much to change. Decisions will be required such as: Will the change require leap frogging or emulation or adopting or adapting superior practices?

Most associations would like to believe they are taking advantage of the best practices available. Now is their chance to make this belief a reality.

Some causes of benchmarking failure are:

- not understanding the benchmarking process
- not understanding how benchmarking supports continuous improvements and quality
- trying to implement another association's successful practices without adjusting for your association's unique requirements
- failing to truly understand why a practice is successful and all the related implications
- failing to mount a formal process and only touching the iceberg by comparing one or two other associations
- providing limited resources
- studying too large an area
- ignoring cultural differences
- lacking internal communication

It is through the support and leadership of the management team that successful benchmarking can be accomplished. Management should ensure that all required resources are in place to conduct projects. It is important to ensure that the necessary resources are included in the annual business plan, identified in the strategic plan and noted in the priorities assigned to staff and association resources.

Benchmarking should be identified as a critical process required to ensure continuous improvement of the association. The association executive should:

- be involved in determining priorities for the benchmarking exercise
- ensure required resources are in place

- communicate the efforts of the benchmarking process to all staff, boards and interested stakeholders
- link benchmarking results to the operational plans of the association
- be the biggest supporter of the project

Benchmarking and the Association Manager

Perhaps the most useful tool an association manager can use is benchmarking. Benchmarking provides an objective measurement of an association's performance in many areas.

Benchmarking will help the association manager seek out best practices currently being used for each of the products, services or processes that are being considered for continuous improvement. Data gathered in a best practices review become an integral part of any successful benchmarking activity, and provide a guide by which performance of your association may be measured.

Identification of best practices and the benchmarking thereof is a primary tool that all association managers are expected to use as part of a continuous improvement process. The best practices review is an ongoing requirement, and must be if the association manager is serious about moving the association forward. The review should be part of the strategic management process.

An essential aspect of assessing best practices is the use wherever possible of tangible performance measures. An effective performance measure will make the best practice review more objective. The lack of such measures makes the analysis more subjective and therefore less effective. Identifying and developing performance indicators to assist with benchmarking is required. This will be covered in more detail in the next chapter.

A critical aspect of engaging in successful benchmarking is to understand the protocol required. Compliance with this code may prevent a door from slamming in your face or enable you to gain insight into valuable practices. Read this code twice prior to embarking on a benchmarking project.

The International Benchmarking Clearinghouse Benchmarking Code of Conduct

Principle of Legality

- If there is any potential question on the legality of an activity, consult with your corporate counsel.
- Avoid discussions or actions that could lead to or imply an

interest in restraint of trade, market and/or customer allocation schemes, price fixing, dealing arrangements, bid rigging, or bribery. Don't discuss costs with competitors if costs are an element of pricing.

- Refrain from the acquisition of trade secrets from another by any means that could be interpreted as improper, including the breach or inducement of a breach of any duty to maintain secrecy. Do not disclose or use any trade secret that may have been obtained through improper means or that was disclosed by another in violation of duty to maintain its secrecy or limit its use.
- Do not, as a consultant or client, extend benchmarking study findings to another company without first ensuring that the data are appropriately blinded and anonymous so that the participants' identities are protected.

Principle of Exchange

- Be willing to provide the same type and level of information that you request from your benchmarking partner to your benchmarking partner.
- Communicate fully and early in the relationship to clarify expectations, avoid misunderstanding, and establish mutual interest in the benchmarking exchange.
- Be honest and complete.

Principle of Confidentiality

- Treat benchmarking interchange as confidential to the individuals and companies involved. Information must not be communicated outside the partnering organizations without the prior consent of the benchmarking partner who shared the information.
- A company's participation in a study is confidential and should not be communicated externally without their prior permission.

Principle of Use

- Use information obtained through benchmarking only for purposes stated to the benchmarking partner.
- The use or communication of a benchmarking partner's name with the data obtained or practices observed requires the prior permission of that partner.
- Contact lists or other contact information provided by the International Benchmarking Clearinghouse in any form may not be used for purposes other than benchmarking and networking.

Principle of Contact

- Respect the corporate culture of partner companies and work within mutually agreed procedures.
- Use benchmarking contacts, designated by the partner company, if that is their preferred procedure.
- Obtain mutual agreement with the designated benchmarking contact on any hand-off of communication or responsibility to other parties.
- Obtain an individual's permission before providing his or her name in response to a contact request.
- Avoid communicating a contact's name in an open forum without the contact's prior permission.

Principle of Preparation

- Demonstrate commitment to the efficiency and effectiveness of benchmarking by being prepared prior to making an initial benchmarking contact.
- Make the most of your benchmarking partner's time by being fully prepared for each exchange.
- Help your benchmarking partners prepare by providing them with a questionnaire and agenda prior to benchmarking visits.

Principle of Completion

- Follow through with each commitment made to your benchmarking partner in a timely manner.
- Complete each benchmarking study to the satisfaction of all benchmarking partners as mutually agreed.

Principle of Understanding and Action

- Understand how your benchmarking partner would like to be treated.
- Treat your benchmarking partner in the way that your benchmarking partner would want to be treated.
- Understand how your benchmarking partner would like to have the information he or she provides handled and used, and handle and use it in that manner.

NOTE: Identification of firms, organizations, contacts/visits is prohibited without advance approval from the organization.

Benchmarking Value and Tips to Get Started

Benchmarking adds value to an association. It provides a direct link between learning and taking action. It shortens the time frame for change by focusing on results of outcomes, not

only the activity. Associations that focus on areas where there is greatest potential for cost savings and greater need for improvement will benefit most.

Benefits of Benchmarking

- Develops innovative thinking
- Implements strategic direction
- Accelerates the change process
- Establishes rigour
- Overcomes disbelief
- Establishes accountability
- Engages culture change

Some tips for getting started:

- Involve senior leaders in communicating visions, values, and goals and strategies to the benchmarking team. This action and information provides direction for the benchmarking process.
- Keep the benchmarking project focused and small.
- Involve those who will be implementing the change.
- Learn from others who have done benchmarking.
- Do not expect too much too soon; understand the impact of the change process on people, roles, culture, systems, processes, methods and structure.
- Start the benchmarking process in friendly, supportive areas where data collection is easier and success is more likely.
- Take adequate time for planning, training and involving people. Provide the necessary tools.
- Create organizational understanding that benchmarking is a management tool, a process, and not “just another program.”
- Do it quickly or do not do it.
- Integrate projects to organizational Critical Success Factors (CSFs). CSFs are the areas where things must go right.

Section 3 provides examples of benchmarking projects and sources of information for those that wish to expand their knowledge further. The examples provided illustrate a simple and more complex framework that can be used to get you started.

A laudable goal in benchmarking is for your association to become a high performance association and a benchmarking site.

“Where companies go wrong is that they don’t start benchmarking before they’re threatened.”

David Kearns
Former CEO, Xerox Corporation

About CSAE Publication & Resources

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The Author

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Jim developed five graduate level online courses for the Association Management Education program of the Canadian Society of Association Executives (CSAE). He also instructs association management courses on the Internet and has insight into hundreds of associations and has seen the good, the bad and the ugly. He developed hundreds of practices for the best practices exchange area for CSAE and served as practice content manager.

He has consulted with over 70 associations on a variety of projects involving strategic management, product and service assessments, membership growth, marketing, communications, online education, surveys, governance restructuring, board training, benchmarking and best practice projects, certification and standards, interim leadership and association turnaround.

His current interest is converting associations to knowledge-based decision making organizations.



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