



Creating Win/Win Strategic Partnerships

According to David A. Westman, MBA, CPA, CAE, author of "Board & CEO Roles for Achieving Association Goals," strategic partnerships involving varying kinds of entities are on the rise and will continue to increase in the future as associations explore innovative ways to grow membership and maintain competitive value propositions.

Westman shared with Board Forward his insights on three key types of partnerships, including those with for-profit entities; those between national groups and chapters; and those based on advocacy-oriented alliances. All come with various issues to consider. But across all three, Westman said, it's most important to put member needs first, and boards can be a critical voice in ensuring their organizations do so.

Partnerships with For-Profit Companies

Many associations have a cadre of corporate partners — vendors, sponsors, exhibitors, advertisers, grant makers and affinity partners, to name a few. Such partners certainly have their own self-interests, but they also recognize that their success is impacted by the association's success.

Westman said it's important for boards and staff teams to evaluate existing partnerships on a regular basis to ensure the objectives that underpin these relationships are aligned with the organization's mission and provide tangible value. Member needs surveys are critical tools for not only helping to evaluate partnerships, but also to identify gaps in service or value where new opportunities can be created. He points to two key areas that many associations consider as they seek to expand the value they offer to members: advanced technologies and evolving education needs.

"What certain for-profit partners can bring to the table is technology — oftentimes expensive technology," Westman said. "Many organizations may not have the resources for the kinds of technologies to better educate members or keep up with credentialing," he said. "Corporate partners can offer proven technology platforms, as well as much-desired marketing reach and the engine to drive interest, while the association itself brings credibility and content," he said.

"As important as it is for associations to evaluate which corporate relationships make the most sense to pursue or maintain, it's important to point out that corporate partners today are paying

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closer attention to their return-on-investment than ever before,” Westman said. “Associations need to be attuned to that fact — ensuring they understand their corporate partners’ goals and help achieve them.” A best practice to consider is undertaking periodic surveys of an association’s key corporate partners — assuring they are pleased with the working relationship and identifying opportunities, from their perspective, to work closer/better with the association.

As far as boards’ involvement with for-profit partners, Westman cautions against two extremes. “First, I’ve seen boards that are very hands-off, and that can result in a failure to nurture these important relationships,” he said. At the other extreme are board members who are courted by corporate partners for a variety of reasons, and it oftentimes becomes difficult to separate that professional relationship from the value that the association’s members are receiving. “Neither demeanor is productive, and board members can strive for an appropriate balance in their approach to for-profit partners that keeps members’ needs in the forefront,” Westman said.

Chapters and Partnerships with Purpose

For national associations with state, regional or local chapters, sustaining effective collaborative efforts between and among those levels is an important part of achieving optimal organizational impact. But before those partnerships can be most effective, relationships must sometimes be addressed and set on a course for success. “It’s valuable for leaders across the organization to interact on a regular basis, explore the working relationships, and agree on the benefits of working together to achieve shared goals,” Westman said. Board members at the national level can be integral to making these things happen, as well as in helping to foster deeper relations across all levels and identifying ways to partner most effectively.

Regarding the latter, the most obvious area is membership. “When I was executive director of the Emergency Nurses Association, one need we quickly identified as we evaluated chapter relations was that they needed guidance on recruiting. We started facilitating an annual meeting for the chapter leaders, offering sessions on best recruiting practices. By making the state and local leaders stronger at recruiting, we ultimately doubled the size of the national membership,” he said.

In turn, Westman added, the effort spent on improving relations with chapters and building membership resulted in a number of new national initiatives. “As a result of our growth, the national organization was able to provide new resources to chapters such as additional collateral materials, support for the chapters’ websites and assistance with state and local conventions,” he said.

Westman also noted that educational programming is a prime platform for more purposeful partnerships with chapters. “In my work with a dental society, it was of great benefit to the members to achieve a blended learning approach through which the national

organization was responsible for the virtual learning elements and the state associations hosted local educational conferences," he said. "While the effort is still a work-in-progress, members are getting what they need but don't have to travel as far or take too much time from their careers to benefit from educational opportunities."

Advocacy-Driven Partnerships

For associations engaged in advocacy, there exists a third area of opportunity: groups that may share a similar agenda. "It can be very difficult for an association to go at advocacy alone," Westman said. He elaborated on varying ways that associations can approach advocacy based on their needs and resources.

"I use the term 'frenemies' to refer to groups that you might be in a position to compete with one day and then possibly partner with the next," Westman said. "When I was CEO of the Congress of Neurological Surgeons, we had a direct competitor. The legislative interests for members of both groups were practically identical, and many even belonged to both organizations," he said. "On one hand, we would compete tooth and nail for who would go to our meetings, but the leaders of both groups were smart enough to avoid being short-sighted when it came to advocacy. We took advantage of many opportunities to band together, and even pooled our resources to share an office space and lobbying staff in Washington, D.C. We could afford more by working together, and the resulting presence and impact was far greater than it would have been on our own," he said.

On the opposite side of the spectrum from frenemies, it's highly possible that there are associations that might share similar interests when pressing legislative developments present themselves. "I currently consult with the Water Quality Association, and there are a number of other groups that we don't necessarily compete with that also deal with water quality and conservation issues. We have our respective advocacy teams meet at least once a year to discuss our agendas and identify ways to work together," Westman said.

"Along the same lines, the Emergency Nurses Association partnered with the American College of Emergency Physicians to advance shared interests in emergency care," Westman said. "They interacted on joint initiatives on the federal and state levels, and involved board members in fostering relationships with members of Congress and officials of certain regulatory agencies. The two organizations also designated local 'advocacy champions,' and trained those nurses and doctors to interact with policy makers in their Congressional districts," he said.

The benefits of collaborating with other groups on advocacy might far outweigh the risks, as long as all parties are clear, honest and acting in the best interest of their stakeholders to achieve a shared outcome, Westman said. Strategic partnerships of any kind, he concluded, should strive for win-win benefits for members and

partners alike, and boards can help structure and evaluate these relationships so that they are best aligned with an association's mission.



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