

Strategic Plan

Strategic planning has become an increasingly important governance tool in volunteer associations where leadership changes often. Some association leaders believe that the planning process is almost as important as the final plan. The process is useful in clarifying and communicating the association's purpose, goals, objectives and priorities. Frequently the planning process helps to coalesce leaders and members around a few essential and core goals.

These plans are highly effective for improving the ability of leaders to govern, for building awareness and support among members, and for communicating with members and others about priorities for the future.

Leadership

Effective leaders create the association's future through strategic planning, forging relationships with key stakeholders and other organizations, building financial and other types of support for their association, and becoming advocates for member needs within and outside the organization.

Association leaders who are responsible for governing their organization have three responsibilities. They are change agents, responsible representatives, and prudent stewards.

Change Agents

Leaders spend most of their time addressing goals with a long-term horizon. These goals describe what will be done, for whom and at what cost to the association. Effective leaders maintain awareness of key trends and issues in the external environment of their members.

Ultimately leaders create a vision of what their profession—in the case of professional societies—and their association will become in the future. From among many competing issues demanding attention, they select those few issues that the association can address realistically and successfully with limited resources. Leaders set goals and realistic objectives; they allocate resources to concrete action plans.

Responsible Representatives

Leaders are elected by members to represent them. They are accountable to members and provide the essential link between the association and its members. On behalf of the association, they make decisions and take actions that are in members' best interest. Once elected, leaders represent the full membership, not special interest groups that may be outspoken and demanding. They act for the good of the whole.

Leaders engage in regular and frequent dialogue with members, including—perhaps especially—groups that are underrepresented such as younger and newer members who represent the association's future. They maintain an adequate level of involvement in the work of the association so that they are well informed.

Stewards

Regardless of size, all associations have too few resources, limited funding, and insufficient staff and volunteer time to fulfill all members' expectations. Thus effective leaders make tough decisions and choices. They allocate resources to the designated priorities and acknowledge that some important and desirable activities may not be funded or supported at the present time.

Consistent with sound financial policies that guide resource allocation and an orderly process that everyone understands, effective leaders choose which activities will be supported and at what level of funding. They set clear expectations, assign responsibility to others—volunteers, committees and staff—and hold them accountable for results. Leaders check regularly with the staff and committees to whom they have delegated tasks to ensure that results are achieved.

All three roles are vital to the effective leadership of associations.



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Management of Library Associations Section

<http://www.ifla.org/VII/s40/smla.htm>

Introduction

Governance pertains to the legal and formal structure for exercising power and authority in the association and ensuring a smooth operation that benefits the individual member and the entire membership.

Associations vary widely in governance structures. This is to be expected because associations have different missions, governmental authorization and regulatory requirements, memberships and relationships with outside organizations. They usually reflect the norms and practices of their country and society. The governance structure always reflects the way the association is organized and to a considerable extent its history.

Nevertheless there are sound governance principles and practices that associations can follow to ensure their effectiveness, long-term success and conformance with generally accepted association practices.

Leadership, on the other hand, pertains to the skills and abilities of the individuals who assume responsibility for the association and have the right to govern. Leaders are expected to provide direction for the future, to influence opinions, and guide the association in ways that build membership interest and support.

This pamphlet describes some governance and leadership principles and practices for consideration.

This pamphlet complements other IFLA RTMLA pamphlets, especially "Guidelines for Library Association Operations," which describes the roles of elected officers, president, executive committee, treasurer, secretary and staff. All of these individuals are involved in governing and leading the association.

Bylaws

Bylaws approved by the full membership are essential. They define the association's purpose so that members, potential members, government and outside organizations understand the nature of the association. They explain the way the association is organized and the manner in which business is conducted. Bylaws define all essential aspects of governance and administration, such as the conduct of elections and rules for nominations, the requirements for annual membership

and other meetings, the rules of order at these meetings, the authority and responsibilities of elected leaders, and the organizational structure like sections, chapters, committees and such.

Membership

Bylaws must define membership eligibility and rights. Different categories of memberships are common. Active members usually possess full rights including the most important ones of holding elected office and voting; other categories for students, retired or associate members may have limited rights. Bylaws define as precisely as possible membership qualifications, rights and restrictions, if any.

If not universal, it is common for associations to guarantee membership participation in voting for leaders, and involvement in policy setting, decision-making and planning for the future. Associations thrive in an environment that places high value on the importance of membership participation and they create many opportunities for members to become fully engaged. Some associations convene annual membership meetings, where members can learn about programs and services, and vote on policies. Other associations use smaller elected groups like councils who have this authority and responsibility.

Regardless of form, it is essential that all members have the ability to voice opinions and influence the policy-setting and decision-making process. This membership involvement provides association leaders with the moral authority to speak on behalf of the membership especially to outside agencies and organizations. It is also essential for members to know that they can influence association affairs and policies through their votes. This is an important attraction to joining and maintaining membership.

Authority

Associations must clearly define where ultimate legal authority resides and what governance structure will be followed. All members and others must know who is responsible. Whether this is an elected council, executive board, an executive committee of a board, an elected president, or staff.

Members must know who provides direction for the future, who represents them to government, who makes decisions that cannot be disputed, who oversees the conduct of day-to-day operations and finances, and who is ultimately responsible to the members for association activities.

Usually this person or group with ultimate authority is selected by members and reflects the whole membership in order for decisions to be acceptable. Often associations take pride in election processes that promote representation of their different constituencies on their governing bodies. These associations make every effort to balance gender, race, experience and expertise, as well as geographic and special interest group representation.

Regardless of the form of their governance bodies, associations are well-served by defining who is responsible for the major governance responsibilities:

- maintaining meaningful and ongoing communication with members
- representing members to outside organizations and agencies
- preparing and approving public and association policies
- monitoring and assuring performance of tasks and assignments
- allocating and monitoring resources

In some associations, the governance body may also be responsible for governmental and legislative relations and fund raising.

Mission

A succinct, clear, accurate and up-to-date mission statement—approved by the members—is essential. It defines the association's purpose and for whom it exists. It serves to communicate this important message to members and others. Today, many associations create or modify their mission statement while engaging in long-term or strategic planning. The mission is crucial because leaders can use it to determine priorities and allocate resources.