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Political Success in Associations: Making the Volunteer-Staff Relationship

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“Volunteers are the lifeblood of any association. Their commitment to and efforts on behalf of the association make it possible to not only establish a mission that respond to member’s needs but also implement programs and services that fulfill those objectives.”

—Wayne E Leroy, CAE, Professional Practices in Association Management

THE WORLD OF ASSOCIATIONS

This paper is designed to be a short primer on association politics for those who work in associations and for those who aspire to work in associations. Your success as a manager in the association environment will depend on how well you navigate the political landscape.

The higher your position in an organization, the more finely you need to hone your political skills. It is critical that you understand how decisions are made and the dynamics of internal power and politics of associations. *Political Success in Associations: Making the Volunteer-Staff Relationship Work* is intended to offer an introduction to this subject.

Association staff members who work in publications, education, certification, or standards will benefit from reading this *McHugh Publication*. Likewise, association executives including executive directors, CFOs, HR directors, and even board members, can also gain useful information. Both staff and member volunteers will get insider’s tips on political success in associations. I offer practical, proven, “been there, done that” experience—not platitudes.

POLITICS IS NOT A DIRTY WORD

A brief discussion of the word “politics” is necessary before diving into volunteer-staff relationships. The importance of smart politics in working with volunteers is the basic premise of this paper and, therefore, we must first examine how the term “politics” is used here.

Does the word “politics” have a negative connotation? One of the content reviewers of this paper thought so, and recommended that I use not use “politics” in the title. This reviewer’s thoughtful comment gave me pause to ponder his suggestion; I did, and then decided to stick with “politics” as the key descriptor for this paper. I agree that politics can be negative, divisive, and vicious, and I will have more about that later. My use of the word is positive and constructive.

Politics, simply, is a way of getting things done when you work with people. It’s about getting people to trust you, not by being phony, but by showing a genuine interest in the people around you. When you actively listen, you are practicing positive politics. When you show respect for the other person, you are being smart politically. If you avoid abrasive responses, people will seek out your opinion more often. Be diplomatic with everyone, even though you may disagree with them. Successful politicians are not dismissive or quick to judge people. They give people opportunities to state their cases. TV pundit Chris Matthews once said, “Political traits are in essence the ability to deal with people. I’m talking about basic likability, the readiness to listen, to project optimism, to ask for help, to display good in the face of opposition.”

Politics is also about understanding people, and using that understanding to predict behavior. “Reading” people, and their real motives and hidden agendas, is a critical skill. One doesn’t have to be overly cynical to do this. However, it is important to pay attention to your intuitive feelings about people—“vibrations,” if you will. President Harry Truman, a lifelong politician, put

Political Success in Associations: Making the Volunteer-Staff Relationship

Work A-14 © 2017 by John B. McHugh page 2 of 8

it best when he said, “Politics is...a game of people and how they will act under certain conditions. You never can tell, but you sometimes guess and I have been a good guesser.”

Politics does have a dark, Machiavellian side. Some people are masters of negative politics for personal gain within the organization. No organization is immune to such individuals. You’ll find them in any organization you can name; e.g., the US Army, the Vatican, the President’s cabinet, and your association board. They are all vulnerable to negative politics.

Some people can be duplicitous, manipulative, and dishonest. Many of us have been victims of these characters. Perhaps their primary characteristics are a lack of integrity and their willingness to advance at someone else’s expense. In effect, they play a zero sum game.

In this paper, my intent is to show how positive politics can achieve win-win outcomes. Your goal is always to stay positive in all your organizational transactions. Positive politics, in the final analysis, is inclusive, and will ultimately strengthen your position. You’ll be in a much better position to influence people if you keep it positive and avoid those who attempt to use politics negatively.

ORIENTATION TO ASSOCIATIONS

An alternative title of this paper could be, “What New Employees Need to Know about Working for an Association.” In many instances, new association personnel are put to work without any orientation or mentoring in the art of working successfully in an association and with its volunteer members.

Let me give you a personal example. In my first association job, at a manager’s level after 20 years of commercial publishing experience, I heard a lot of negative comments about the volunteers from my new staff colleagues. This information was not helpful or construc-

tive: what I needed was guidance on how to make my relationships with the volunteers succeed. I also needed an explanation of the association’s governance and how decisions were made. Negative comments based on a few bad experiences with volunteers were not helpful.

Associations need an orientation for all new staff on the dynamics of the volunteer-staff relationship, the association’s governance structure, roles of volunteers and staff, and some suggestions on how to succeed politically.

For the most part, recent college graduates adjust quickly to the association environment. However, for those who are veterans of commercial publishing this is not always the case. The volunteer-staff dynamic interaction can be a culture shock for those who have never worked with volunteers who may have more power over staff members’ work than other staff members do. It is important to set the stage by specifying the volunteer’s role and responsibility to ensure new association staff members will succeed in the association environment. I will offer a number of suggestions that will help you to prepare such an orientation for your colleagues who are new to the association world.

VOLUNTEER DEFINED

Associations produce information through various departments. This may include professional certification, educational material and symposia, publications, and standards. The information products include books, seminars, journals, and a variety of web-delivered content. Commercial companies also produce and sell similar products in direct competition with associations. One of the major differences between commercial organizations and associations is that associations have volunteers involved in all of these programs. Commercial publishers do not use volunteers who exert direct influence over a publications program.

An association volunteer is a term familiar to those of us in the association publishing world. However, other

Political Success in Associations: Making the Volunteer-Staff Relationship

Work A-14 © 2017 by John B. McHugh page 3 of 8

readers may not be aware that, in this context, the term “volunteer” refers to anyone who is not a staff member and who is not paid for their service to the association.

A volunteer is usually an association member who contributes time, expertise, and vision to programs that fulfill the organization’s mission or strategic goals. All elected officers are volunteers, whether they are the national president or the treasurer of a local chapter. Often association bylaws allow for volunteers to serve in leadership roles for the organization’s various programs, including professional certification, educational material and symposia, publications, and standards.

Volunteers may serve as subject matter experts (SMEs), writing educational materials and contributing to certification standards. Volunteers also sit on the advisory groups that serve the board and the staff members. Typically groups that compliment official advisory groups that develop policy are called committees; for example, the publications, certification, or education committees. Sometimes these units have a broader advisory function in terms of editorial direction and substantive content issues.

Now let’s examine how associations differ from commercial publishers.

HOW ASSOCIATIONS DIFFER FROM COMMERCIAL PUBLISHERS

In developing a full understanding of how associations work, you need to be aware of the key differences between association and commercial publishing.

Association publishing differs from commercial publishing in the following ways:

- Decisions made are generally risk-free as much as possible.
- It sometimes takes longer to make decisions because of volunteer involvement.

- Associations fail to maximize sales due to a lack of a clear strategic market awareness, or efficient investment of human and capital resources for their publishing business.
- Associations can be hindered by micromanagement by inexperienced volunteers.
- Associations lack some of the financial incentives of commercial publishing; for example, bonuses and pay for performance.
- Associations are highly political; i.e., volunteers may have extensive hidden agendas.

Coming to an association from the commercial publishing world, you might find the slowness in decision-making to be particularly frustrating. Boards generally do not have the ability to make business decisions rapidly. This is problematic because many decisions about programs are, in reality, business decisions.

Opportunities can be lost, which will be frustrating to some staff members. Some associations, however, have a fast track decision process that requires only the approval of the executive or management committee (smaller bodies than the board), which can expedite a decision for a publications project.

How each of these characteristics will play out in individual organizations will vary in degree. However, these observations are generally valid in associations. Accept these characteristics as the rules of the game and you will succeed in your association career.

IMPORTANCE OF A MISSION STATEMENT

If you are involved in any aspect of managing an association professional certification, educational material and symposia, publications, and standards program, it is important that you understand what the organization wants to accomplish with each of its programs. Always remember that you have a number of bosses you need to please with your performance.

Political Success in Associations: Making the Volunteer-Staff Relationship

Work A-14 © 2017 by John B. McHugh page 4 of 8

You report directly to your manager who could be the executive director or any department director in the staff hierarchy. But you also need to please your volunteer vice president, other volunteer board members, your publication advisory committee, and in addition, members and other customers. So a mission statement is important protection when there is disagreement as to what is and what isn't involved in the program you manage.

How to Develop a Mission Statement

“What is the mission of your publishing program?” In many publishing audits, I find that no one can answer this question. If this is true in your organization or if the answer depends on whom you are asking, then you need a mission statement. Can your association leadership answer these questions, “What does the organization want to accomplish with its publications? What is the job of publications?”

Publishing in many organizations tends to evolve without a deliberate strategic master plan. Some associations can't seem to make a commitment to grow publishing as a business—as an income-producing asset that requires an overarching strategy and investment of human and capital resources.

Associations should broaden their vision of publications, or any other information program, to encompass all of its possibilities as a significant profit center. Don't limit the program's potential by seeing it only as a subsidized service to members. Publications, or any program, can serve the mission of the association and also earn substantial margins that can support other programs.

An association's publications program should be valued as a significant income-producing asset and operated as a business. For more information on this subject, you may want to read the McHugh Publication, A-9 *Making Association Publishing an Income-Producing Asset: Role, Mission, and Stages of Development*, 2009, 5 pages.

Questions to Ask When Developing a Publications Mission Statement

As you contemplate the mission of your association's publications, explore these questions:

- What types of publications does the association wish to publish: newsletters, journals, books, magazines, or combinations of each?
- What does the association want to accomplish with its publications?
- Does the association view its publications as a business needing investment of capital and human resources to increase sales and margins while serving the organization's mission?
- How much is the association willing to invest in publications to grow sales and margins?
- What is the risk/reward ratio if the association invests more capital in its publications?

RUNNING AN ASSOCIATION AS A BUSINESS

The hidden truth, sometimes ignored, is that most association programs—including certification, education, publishing, and technical standards—are businesses. Staff needs to monitor cash flow and sales. Budgets, business plans, and market research must be considered, developed, and managed.

Many of us have heard the refrain from volunteer board members that the association's programs are “too commercial” or “making too much money” or that “prices are too high.” Most likely you hear this comment when you make a decision a board member does not like, sometimes because it may hurt the volunteer's business interests. It is not uncommon for end-runs to occur when a board member goes over your head to the executive director (ED) and volunteer president to get a decision you made reversed.

Political Success in Associations: Making the Volunteer-Staff Relationship

Work A-14 © 2017 by John B. McHugh page 5 of 5

Many times volunteers have pet projects in which they work back channels from the board of directors to the president to the ED and then collectively hand the project off to you. Surprise! The idea for the new product or service may have merit, yet there is no budget or staff time available to execute the new idea.

Programs, such as publishing or certification or standards, *must be economically sustainable and need business stewardship*, and that is you, the staff leader. Sometimes you must fight for some business aspect of your program. It is worth it—you earn your living managing an association program, the volunteer does not. If your program fails financially, the staff member is accountable, the volunteer is not. The volunteer's life goes on as usual; you could lose your job.

Next, we will discuss the role of the publications vice president, a volunteer position with whom you will interface regularly.

PUBLICATIONS VICE PRESIDENT

The term “vice president” in an association describes the board position, as established in the by-laws, which is responsible for the policy development and direction of a program, such as publications. In some organizations, the term vice president is the same as director but I will use vice president here. Vice presidents and board members are always volunteers. A vice president is vital in the exchanges among staff, members, and board members regarding the needs of the profession.

A word on the fiduciary relationship of association directors is needed in order for you to fully understand your vice president's role. A vice president stands in fiduciary relationship to the corporation which requires him/her to serve in good faith in the best interests of the corporation, diligently, and with a reasonable degree of care. The fiduciary duty is owed to both the membership and to the corporation itself. This is important for

you to know and will offer you insights into the dynamics of the volunteer-staff relationship.

Like the Rolling Stones song “You Don't Always Get What You Want,” staff members have no say in the selection of the vice presidents. However, it still is useful to understand what characteristics make a vice president an asset to you as a staff member. What attributes should your publications vice president possess?

A publications vice president should be a combination of many attributes. Knowledge of the field and its needs is a prerequisite. Volunteer authors need to be sold on your publications program and must be recruited. The vice president should be charismatic and able to recruit prospective authors and editors for your publications program.

The vice president should be passionate about the association and the focus of the publishing program's specialty. A program vice president needs the time to do the work involved with the office. Many vice presidents accept the title as an honorific but don't have time to dedicate to the job. This is a situation you don't want. Make sure that your executive director or nominating committee understands the requirements of the position. Provide them with a clearly written approved position description.

You also want a visionary and strategic thinker. You want your vice president to see beyond daily operations and focus on the strategically bigger picture. An effective vice president must subordinate their special interests to the needs of the association.

Building a successful association publishing program does not happen by accident. Success is accomplished by purposeful action on the part of the publications vice president and publications staff.

Political Success in Associations: Making the Volunteer-Staff Relationship Work

A-14 © 2017 by John B. McHugh page 6 of 8

Generally, staff has no formal say in who is appointed vice president. But there are informal networks, and you will have board members who are your friends, so don't hesitate to informally recommend the name of a strong candidate for your program vice president. In most associations, ED's have some clout in recommending vice presidents. Your job is hard enough; you don't have the time to carry a vice president who can't do the job

The publications vice president is critical to your success and can be a strong ally for you. The vice president is a peer of the board member, you are not. Related to this observation is that your vice president has more power than you do. Learn to live with that fact and to use positive politics to your advantage.

TIPS ON WORKING WITH VOLUNTEERS

Define the Roles of the Volunteer -Staff Relationship

According to Wayne Leroy in "Association and Governance" (Chapter One of *Professional Practices in Association Management*):

- "The role of volunteer is to ensure that the association serves the needs of the members by establishing direction and policies for programs, products, and services. They focus on longer term strategic issues."
- "The role of staff is to keep the association moving ahead in the direction and according to policy established by volunteers, by implementing procedures that deliver the programs, products, and services to the members. They focus on shorter term operational issues."

This is a good description of the respective roles of staff and volunteers. In actual practice the roles of staff and volunteers tend to blur when it comes to running a program.

My experience is that staff leaders must take responsibility for the business stewardship and strategic planning

of the program. Most volunteers rarely have the time or background for these matters. However, the programs must be managed in a collaborative way with staff buying in to the best way to work with a program vice president.

Ask the best and brightest volunteers for their advice about member and customer new-product needs.

In addition to serving as subject matter experts, volunteers can provide you with insights into what your customers need, primarily because they are your customer too. Try to recruit subject matter experts you are comfortable working with.

Involve volunteers in your publishing program.

Form editorial panels and use your top volunteers as subject matter experts for your periodicals and books. Some organizations have management advisory groups (MAG) to advise staff on editorial trends, review manuscripts, and, in general, provide a window to the customer's market place.

Elissa Matulis Myers, CAE, a former publisher at the American Society of Association Executives (ASAE), stated in a seminar on association publishing:

One thing that makes association publications special is the rich resource of experience and expertise that members of the association have to share with each other. Within the profession that your association represents are the individuals who are:

- *Inventing the standards of best practice*
- *Setting benchmarks*
- *Experiencing the problems and finding solutions to them*
- *Mastering the craft*

Political Success in Associations: Making the Volunteer-Staff Relationship Work

A-14 © 2017 by John B. McHugh page 7 of 8

Prevent micromanagement by volunteers in the business operation of publishing.

Volunteers should set policy and direct mission strategy but not supervise staff in daily publishing activities. The tighter the volunteer control, the less successful the publishing program. It must be clear to the volunteer leadership that association staff are experts in what they do.

Staff members know the publishing business, volunteers do not. Micromanagement invariably leads to poor staff morale. As an association executive, deal with volunteer micromanagement at the first sign of it. The accumulation of power can be addictive and associations are not immune from this phenomenon.

Learn how to say “No” diplomatically.

Many times volunteers have good ideas for new products and services but haven't thought about staffing or budgets. Volunteers must understand the financial implications of what they are proposing.

Create a new *venture screening checklist*, with questions, to evaluate volunteer proposals. Sample questions include:

- How does this idea fit into the association's strategic plan?
- What short and long term goals will this new product/service serve?
- Is there budget available?
- Is staff time available to work on this project? Who?
- What additional resources are needed?
- What needs will this new product/service serve?
- Do you anticipate this to be revenue neutral, earn a profit, or be subsidized by the association?

Once you have this information, saying “Yes” or “No” can be done on a rational basis. If the volunteer's idea has no merit or no budget or is just plain foolish, and will be a losing proposition, then you have an argument for saying “No” if the volunteer goes over your head, which could happen.

For a review of basics on staff-volunteer relationships read the McHugh Publication A-1 *Nine Tips for Working with Volunteers in a Publishing Program*, 2009, 4 pages.

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RESOURCES ON ASSOCIATIONS

I tried to list those with information on association publishing although much of what you generally find on associations is about design, editing, and communications. Precious little of the literature looks at association publishing from a top-down executive, organizational viewpoint.

Books:

- Cox, John B, *Professional Practices in Association Management*, Washington, D.C. ASAE, 2007.

Associations and societies are in the information and education business. This is true whether information is delivered in print (books, magazines, journals) or live (educational seminars and conferences) or in electronic formats. It is important to keep in mind the interdependencies between association publishing and other

Political Success in Associations: Making the Volunteer-Staff Relationship Work

A-14 © 2017 by John B. McHugh page 8 of 8

information-driven programs, such as certification, conferences, education (professional development), standards, E-learning, and symposia. This important book covers the scope of all association programs in addition to important subjects such as governance, budget and finance, membership, and legal issues.

- Barwis, Richard , *How To Build Association Advertising Sales Revenue With Magazines, Websites & Electronic Media*, Cornerstone Media, <http://www.cornerstone-media.biz/> 2009

Read this short book if you want to learn how to increase advertising sales. The author is an advertising sales pro who also understands the political dynamics of associations. (Disclosure: I was a senior reviewer on this book and wrote the section on copyright and Web sites.)

- Smith, Bucklin & Associates, *The Complete Guide to Nonprofit Management*, New York, New York, John Wiley and Sons, 2000.

The book provides a broad overview of associations and is a good primer for those wanting an introduction to the subject. There may be more up-to-date references but association management basics are nicely covered. Its one shortcoming is that it has nothing on association publishing programs.

Magazines and Journals:

- *Associations Now*, American Society of Association Executives (ASAE); monthly membership magazine.
- *Association Publishing, Association Media & Publishing*TM, bimonthly membership magazine.
- *Journal of Association Leadership*, ASAE and The Center for Association Leadership; published annually most years; some years semi-annually.

MCHUGH'S WEB SITE:

Posted on my Web site are **38 McHugh Publications** on various aspects of publishing, including one section exclusively dedicated to association publishing. Here is the link:

http://www.johnbmchugh.com/free_mchugh_pubs.htm

ABOUT JOHN B. MCHUGH, PUBLISHING CONSULTANT

John B. "Jack" McHugh is a 40-year veteran of the publishing business. Jack has worked as an executive for Houghton Mifflin, Wadsworth, and Saint Mary's Press. Jack is also an experienced association publishing executive.

For seven years, he was Publisher and Director of Programs at the American Society for Quality and for a two-year period, he served as the Interim Publisher at the Project Management Institute. He is a member of the ASAE Advisory Board for Publishing, Communications, and Media Issues and Practices.

Jack's specialties include association/nonprofit publishing, book publishing, executive recruiting, journal publishing, rights and permissions, new ventures, organizational design, and social media strategy and policy. McHugh and Liz Novak, of IAPD, are co-authoring a series of papers on Networking Techniques. Jack Mc Hugh is also the manager of the LinkedIn[™] group, Association and Nonprofit Publishing.

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