

# The Six S's of Collaborating With Your Board



January 8, 2018

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**Association leaders willing to embark on organizational change need the support and backing of the board. Here are six steps to facilitate a positive relationship between executive leadership and the board of directors.**

Association executives must adapt to the changing environment and member needs. Coming into an organization as a change agent is exciting yet challenging. The bottom line is that change, while necessary, is hard. If you plan to drive change, it is essential to have the support and partnership of the board of directors.

I was fortunate to have been in that position, leading the organization to work with the board to effect significant changes to address shifting member needs. Together, we accomplished so much, including a merger and rebrand, changes to the governance structure, and several member-led initiatives, including the development of two new chapters and the strengthening of our strategic partnerships.

Our plan for improving collaboration resulted in a safety effort that provided important programs and tools for the industry's performance. Furthermore, my life was enriched by the opportunity to work with passionate and proud members of the industry.

In assessing our work, I realized that this process could be described by what I call the “six S’s” of board collaboration:

**1. Support.** It goes without saying, but any significant change effort needs the support and oversight of the board of directors. Working with the board to effect change is a partnership that requires commitment, mutual trust, and at times, stamina.

**2. Strategic planning.** The change process begins with defining or redefining the association's mission and vision followed by the creation of a strong strategic plan. Defining the mission is a critical step that describes the fundamental purpose of the organization and forms the platform on which the strategic plan will be built.

This strategic planning process facilitates development of a clear understanding of where the organization must go. It also serves as a checkpoint to ensure that the association is equipped and structured to succeed. The strategic plan should be developed with board members in cooperation with member thought leaders as well as staff. Development of the plan should be informed by an analysis on the current state of the organization, including data from member surveys, key membership trends, changing landscape and needs, and a history of successes and concerns, along with financial history.



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**3. Structure.** A strategic plan that makes significant changes to the association’s direction may require an organizational review to ensure structure, staffing, and competencies to effectively implement the plan. Structure should then follow strategy to ensure success. While staffing is the purview of the CEO, these changes should have the clear and visible support of the board, as well as board buy-in on communicating with members on the purpose of and support for these changes.

**4. Strong communication.** Change can be unsettling, and with poor communication tactics, it can quickly get misinterpreted. It is important to keep the board and the broader membership apprised of actions and outcomes all along the change effort. We made detailed reports on our progress to the board at each quarterly meeting and conducted a formal review at the second year of the plan. We also sent weekly summaries of accomplishments to all board members and committee members. These open lines of communication helped to express concerns and suggest adjustments to maintaining momentum and balance.

**5. Sufficient funding.** As leadership works with staff to develop an implementation plan for the strategy, sufficient funding is also needed. If the plan exceeds available funding, then either the plan needs to be adjusted or other sources of funding secured.

Board support for the budget that funds implementation is essential. Map budget needs for the first year of implementation, as well as for the life of the plan and make sure the board understands all aspects of the budget. This will serve as the basis for projections and any circumstances where projections and needs will be affected.

**6. Success measures.** Defining clear and quantifiable measures of success cannot be overstated. These measures should be part of the implementation plan and include both leading and lagging indicators. Leading measures may be more process-oriented, such as ensuring that members are informed on a regular basis, while lagging indicators may be more outcomes based, such as the passage of a piece of legislation. These measures should also be reported to the board at regular intervals, coupled with discussions about needed adjustments to the plan.

When contemplating the significant step of organizational change to meet the future needs of your membership, ensure your efforts are made in partnership with your board. To ensure a successful effort, consider the “six S’s” in planning and implementing that change.

**Tags:**

 **BOARD OF DIRECTORS**

 **STRATEGIC PLANNING**

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