

The Strategic Relationship Plan: Leveraging the “Who You Know” to Achieve Your Goals

**John Barnes, President
Barnes Association Consultants**

Working with groups outside your association

- Almost every association conducts array of **meetings and activities** with external groups
- Member leaders and staff spend **time and money** on outreach
- Too many do not **connect these activities to strategic plan** of their association



Strategic Relationship Plan

- Your association's **strategic plan** is the most important work of association
- Your **Strategic Relationship Plan** should specifically advance the **strategic plan** of your association
- If you don't have a plan, you won't know where you're going...
If you don't know where you're going, you're guaranteed to get there



What is a Strategic Relationship Plan?

- Organized list of your association's relationships with **other associations, external groups and coalitions**
- List of relationships that has been **reviewed and prioritized**
- List of relationships that specifically help to **advance strategic plan** of your association



Creating a Strategic Relationship Plan

- Review your **current outreach connections**
- Identify **new connections**
- Review your **current participation in coalitions**
- Identify **new coalitions**
- Potentially **create new coalitions**
- Identify **roles** in implementing your Strategic Relationship Plan



Review your current outreach connections

- **Make a list**
- Who are **key organizations and** groups you currently interact with?
- Include every **member leader** and **staff member** in your review



Identify new connections

- **Review** the list of current outreach connections
- **Who's missing?** Who should be on the list?
- Start **wide and far**... then **narrow down**
- Be **creative and thoughtful** in your review... don't assume the status quo groups are the only ones



Review your participation in coalitions

- **Make a list**
- Who are the **key coalitions**?
- Include every **member leader** and **staff member**
- **Review.** What coalitions are missing?



Review your participation in coalitions

- Coalition analysis: **The Coalition Involvement Questionnaire**
 - Name of **coalition**
 - Name of **staff point person**
 - **Dues** (Y/N) and amount
 - **Description** of coalition
 - **Strengths** of the coalition
 - **Weaknesses** of the coalition
 - **Advantages** of joining
 - **Threats** that could exist if not joining
 - **Level of involvement** (Priority, Partnership, Relationship)



Consider creating new coalitions

- **Be a leader**... create a coalition
- **Permanent** coalition or **temporary** coalition
- Temporary coalition around **specific issue**
 - **Mission** is very specific
 - **Time limited**
 - **Goes away** when mission achieved
 - Often around **legislative/regulatory** initiative



Identify roles in implementing your Strategic Relationship Plan

- For each association or coalition
 - Who is the **staff point person**?
 - What **other staff** are involved in the relationship?
 - What **member leaders** are involved (if any)?
- The review should include **everyone** in your organization that interacts with an external group
- **CEO must play a leading role in the development of the Strategic Relationship Plan**



It's hard to say goodbye

- When you prioritize your relationships, you'll find a group of coalition that does not advance your strategic plan... **end it!**
- This is tough... But if you don't you don't end it you'll have a **bloated Strategic Relationship Plan**
- Don't spend your association's precious resources with groups and coalitions that are **not connected to your strategic plan**

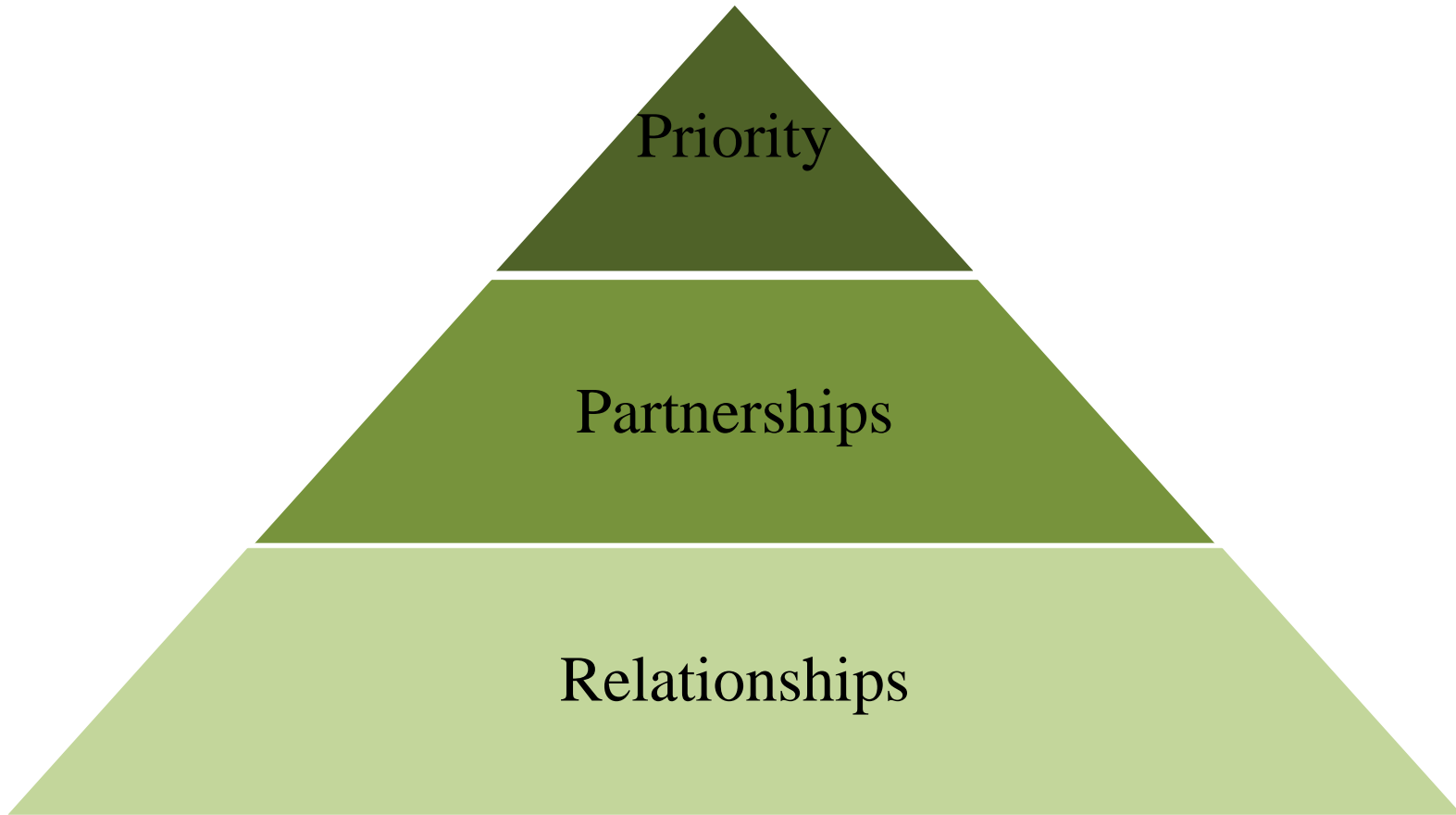


A caveat

- Participation in **larger, broader coalitions** only tangentially related to strategic plan may be worth your time and effort
- May give you opportunity to advance your specific goals by being seen as a “**good player**”
- May be excellent **networking** opportunity
- **Be just as strategic** with your assessments with these larger broader coalitions



Prioritizing Your Outreach: The Pyramid



Priority

- Your association is **proactive** about these relationships
- You **provide leadership** and work collaboratively
- These relationships should be **few in number** in order to maximize your association's ability to focus
- Requires **leadership** by your association, including significant **monetary resources** and **staff time**



Partnerships

- Your association would play a role as a **participant** and be interested in **monitoring the activities** around this relationship
- This relationship **would require staffing** but likely **minimal monetary resources**

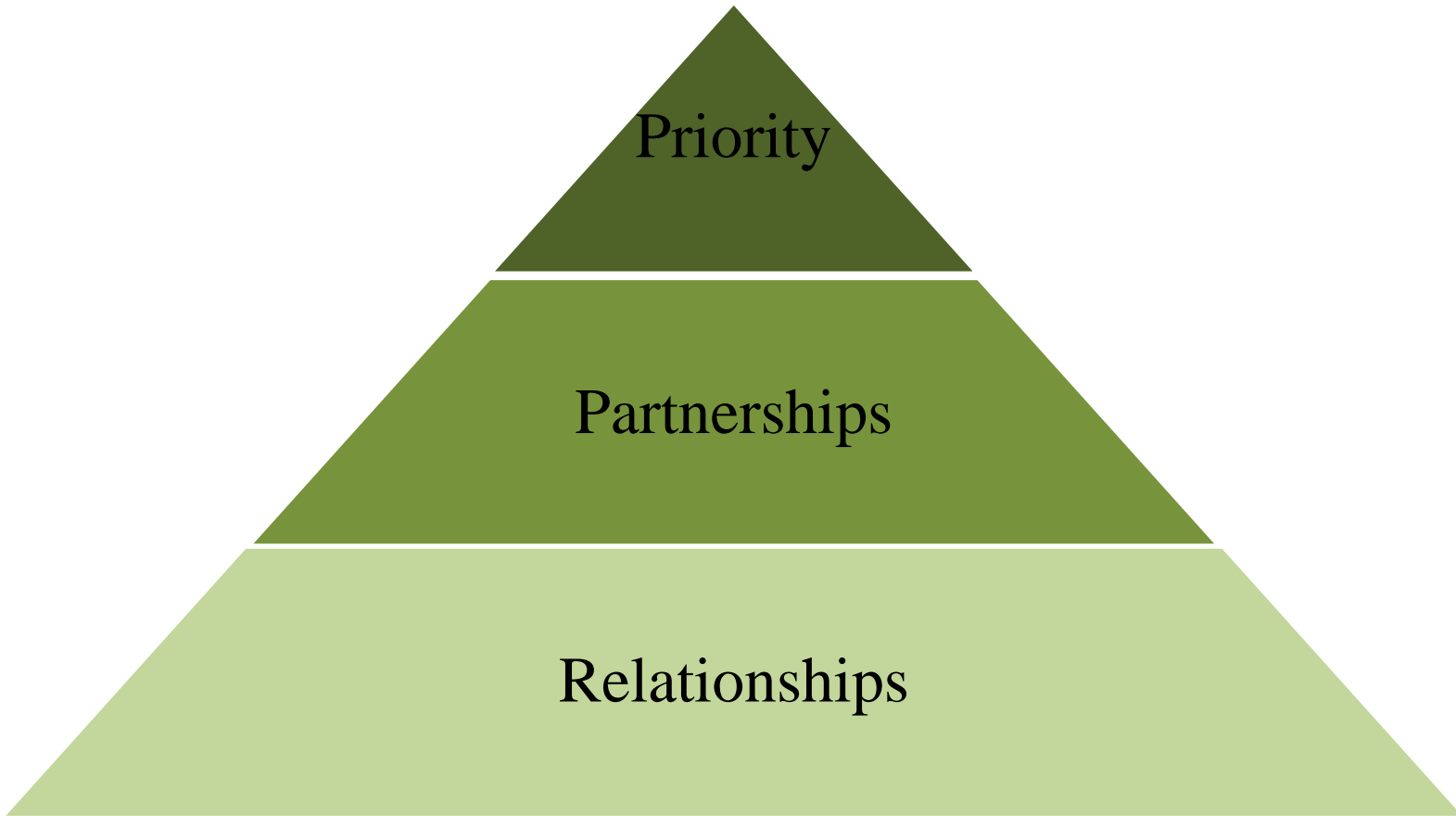


Relationships

- This is a relationship where your association takes a more **passive** role
- This relationship would require **minimal staffing** and **no monetary resources**



The Pyramid



Bottom line

- With an effective Strategic Relationship Plan, you can be more confident that you are **not wasting the precious resources** of your organization... and that your organization's outreach is **advancing the strategic plan** and relevant to your members

