


Stakeholders Checklist


- ~ Have your key stakeholders been identified?
- ~ Is there a documented plan / approach to stakeholder engagement?
- ~ Do you have a stakeholder engagement strategy and / or communications plan?
- ~ Do you have a complaints handling policy and procedure?
- ~ Is there a policy framework within which funding agreements are negotiated?
- ~ Do you have a register of funding agreements?



Who are Stakeholders

Stakeholders are the people or bodies whose decisions affect you or who are affected by your decisions and may include:

- ~ Members
- ~ Supporters
- ~ Sponsors
- ~ Peak Bodies
- ~ Allied Organisations
- ~ Funders
- ~ Regulators
- ~ Clients




Rules of Engagement

Create and build healthy relationships – right people / right relationship

Rules of Engagement – develop a policy framework to identify what you value and how you intend to act in your dealings with others e.g.

* Integrity	* Transparency
* Consultation	* Collaboration
* Delivery	* Timeliness

Guiding principles should reflect how you would like to be treated.




Align Values

Align Values:

- Do you and the organisations you deal with make a good fit?
- You may not always have a choice of stakeholders but some relationships are discretionary e.g. sponsors / partners

Set guidelines:

- Do you align with tobacco or alcohol production, promotion or sale?
- How about fast-food chains?
- Identify who you would not work with and those only in certain cases
- Who makes decisions – which are delegated or committee only?



Identifying Stakeholders


Two broad categories:

- those who are affected by your decisions and actions and
- those whose decisions and actions affect you.

Common categories:

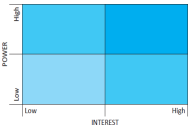
Members	Clients	Staff
Suppliers	Sponsors	Funders
Government	Regulators	Allied Organisations
Interest Groups	Media	Public


Start compiling your stakeholder register by populating these categories



Stakeholder Analysis

- Stakeholders are not equal
- Consider their interest in and power over your organization
- Low interest and low power stakeholders are less important
- Prioritise your efforts into those with the greatest influence






Stakeholder Analysis

- Focus attention on the important – high power & high interest
- Don't be distracted by squeaky wheels – low power & low interest
- Resources should be targeted, effective and appropriate

POWER	High	Keep Satisfied	Actively Engage
	Low	Monitor	Keep Informed
		Low	High
		INTEREST	


- Update registers according to activity e.g. a previous “keep informed” stakeholder may become an “actively engage” for a specific project



Understand Stakeholders

Make the effort to understand your stakeholders’ drivers & motivations.

- What is their financial or emotional interest?
- What information do they want or need from you?
- What is the best way of communicating with them?
- What is their current opinion of you – is it based on good information?
- If they are not being positive, what could win them around?
- If you can't win them around, how can you manage their opposition?
- Who might they influence, either positively or negatively?



Stakeholder Status


Remember:

- People are people, they do business with people they know, like & trust
- Be aware of their attitudes to your organisation or project.

They can be:

Blockers * Critics * Neutral * Supporters * Raving Fans

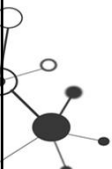

Try to move stakeholders along the path from blocker to raving fan!




Move Stakeholders Along the Path

Journey from Blocker to Raving Fan

- ~ Always do what you say you're going to do
- ~ Tailor engagement to individual stakeholder needs & motivations
- ~ Go the extra mile – turn satisfaction into delight !
- ~ Don't just talk to stakeholders – make sure to listen as well
- ~ Fulfill all agreed obligations promptly and efficiently
- ~ Remember that stakeholders are people too and
- ~ Put as much effort into maintaining stakeholders as you did finding and recruiting them.

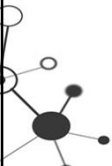







Stakeholder Communications

Communications Worksheet – Refer Sample

- ~ Stakeholder – Type/Name & Contact
- ~ Approach – From stakeholder analysis
- ~ Key Issues & Interests – Motivating forces
- ~ Current status – Where are they along the path
- ~ Desired actions – What you want the stakeholder to do
- ~ Messages needed – information you need to get through
- ~ Action – What you need to do to get your message across



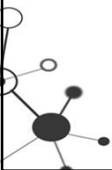

Complaint Handling

How to avoid complaints?
Don't do anything!


Complaint Handling Policy and Procedure - Guidelines:

- ~ Receive
- ~ Process
- ~ Resolve

Quick, Fair and Constructive handling can turn critics into supporters.
Poorly handled complaints can lead to time-consuming disputes and damage reputation.





COMPLAINT



Complaint Handling Process


- ~ Listen to the complaint – understand & take ownership
- ~ Apologise – this may be all that is required
- ~ Don't take it personally – don't get defensive, be open
- ~ Be understanding – paraphrase & sympathise even if you don't agree
- ~ Take ownership – ensure the issue is dealt with appropriately
- ~ Find out what is necessary to resolve the issue – specific actions
- ~ Check you have all the facts
- ~ Record the complaint – what was the problem & how was it resolved



Complaints & Fairness

Natural Justice / Procedural Fairness:

- ~ Provide information to those involved
- ~ Allow opportunity for case to be put
- ~ Investigate reasonably before making a decision – facts not opinion
- ~ Only take account of relevant information
- ~ Act fairly and without bias
- ~ Handle the matter without undue delay
- ~ Keep a record of the complaint and outcome



Members Checklist

- ~ Do you have an up-to-date register of members?
- ~ Are different classes of membership clearly defined and relevant to the organization?
- ~ Is an Annual General Meeting held each year?
- ~ Are all members provided with a notice of the Annual General Meeting in accordance with the Constitution?
- ~ Do you know the minimum number of members required for the meeting to be valid?

Continued...



Members Checklist Cont.

- ~ Are you clear on the election procedure for Committee members?
- ~ Do you publish an Annual Report?
- ~ Do you have a member engagement strategy?







Membership Register

A membership register is a required record and should include:


- ~ Full name of the member
- ~ Postal or residential address and digital contacts
- ~ Date of membership admission
- ~ Class or type of membership category
- ~ Date of ceasing to be a member and reason
- ~ Details about termination or reinstatement
- ~ Any other details the Management Committee, or the members at a general meeting, decide is necessary.






Register Access

- ~ A member may access the register by contacting the secretary
- ~ It must be open for inspection by members at all reasonable times
- ~ Other than their name, certain information may be withheld for safety or privacy issues
- ~ Most associations are not impacted by Privacy laws but be mindful of sensitive personal information
- ~ Information cannot be used to contact a member about or send advertising for political, religious, charitable or commercial purposes, unless approved by the association
- ~ What could the register be used for?






Additional Information

- ~ Gather additional information when creating or updating registers
- ~ Learn about their interests in the association and what it does
- ~ Look for future volunteers, discuss expectation around volunteering
- ~ Record their intentions and check participation during first year

How to store information


- ~ Look for an Association Management System(AMS) or Customer Relationship Management (CRM) system.
- ~ Check if free or low cost versions are available
- ~ Look for a cloud based system with remote storage and access



SAAS

Software as a Service - There is a vast array of products available from simple CRMs to full-blown Association Management Systems. If you find one that suits your needs; let me know. Some examples:


ACT Pro	CiviCRM
Hubspot	Member Jungle
MemNet	Membes
TidyHQ	Wild Apricot
Zoho CRM	www.capterra.com (search)



Class of Members


Are all members equal? What is in your constitution?

- ~ Is it clear what class of membership someone falls within?
- ~ Are they entitled to exercise all rights of membership e.g.
 - . access to member benefits
 - . the right to vote
 - . the right to hold office
- ~ Is there a distinction between members under / over 18
- ~ Do all members pay a fee or the same fee?
- ~ Are there corporate (nominee) and individual members?



Class of Member Examples

Category	Definition	Voting Rights At General Meeting
Caregiver Member	A nominated representative of each family who has other family members involved with or serviced by the association.	Yes
Representative Member	A person representing an organisation with an interest in the activities and services of the association.	No
Active Life Members	A person who has been accepted at an AGM under the conditions of the current By-Laws and who has volunteered or attended a general meeting in the past two years.	Yes
Non Active Life Members	A person has been accepted at an AGM under the conditions of the current By-Laws and who has not volunteered or attended a general meeting in the past two years.	No
Honorary Member	Person or organisation invited to membership by the management committee in the interest of the association for such a period as may be deemed.	No
Volunteer Member	A member of the management committee or a volunteer working with the association (must be over 18 years of age)	Yes



When Membership Starts

Financial status may impact a member’s rights, however the moment of membership is not when they apply, nor when they pay membership. It is only when they have been formally accepted through the process outlined in your constitution. **A typical clause would say ...**


Admission and rejection of new members

(1) The management committee must consider an application for membership at the next committee meeting held after it receives—

(a) the application for membership; and

(b) the appropriate membership fee for the application.

This means that it is not possible for anyone to join your organisation at the AGM or any other general meeting and claim their right to vote.




What Members Need to Know

On Joining

~ Members must be advised of the level of public liability (broadform) insurance that is held by the association. For example Qld AI Act

Level	Annual Turnover or Assets	Public Liability
3	Under \$20,000	Not required
2	\$20,000 - \$100,00	Not required
1	\$100,000 & Over	Mandatory

~ Membership information should also include key contact information, organisational information and anything else they will need.




What Else Should They Know

On Meetings

- Members have to be advised of dates and times for general meetings and for certain meetings the items to be discussed e.g. AGM/SGM.
- Most constitutions also prescribe the amount of notice to be given for different types of meetings.
- If you keep proxy voting, don't forget you must send a form to each member (or make one available) prior to every general meeting.

On Elections


- Most relevant legislation now requires the association to notify members running for election to the management committee of the amount of public liability insurance currently held (see above).



Good Practice to Advise

During Participation

- It's a key part of your risk management to advise members of insurance that covers them and any conditions that may make them ineligible to access it (e.g. "volunteers" defined narrowly or relate it to age).
- WHS legislation now covers volunteers and places further responsibilities on those organisations with employees to include volunteers and members in their induction and training programs.
- Certain things only the members can decide on or ratify at a general meeting however any decision made by the membership can only be reviewed or changed by the membership.




Engaging Members

It is becoming more and more difficult to get your messages out to members and to hear their responses.

90% of members don't care about what you are doing, who is doing it or what you need from them.

Assuming it ever did, one size no longer fits all, and you need different strategies for different members.

While email blasts or text messages work some of the time, you need to identify what type of members you have and how best to engage them all.




Member Types

Have you identified what type of members you have -

- ~ Seemingly Disengaged
- ~ Remote Members
- ~ Younger Members
- ~ Older Members
- ~ Super-Engaged Members

You may have others and need to consider a system to engage with them.






Engagement Strategies

Seemingly Disengaged – they come to you but don't engage with other members, not likely to participate or share opinions in a group setting.

- ~ Kick off events earlier with networking ice-breakers, help them open up
- ~ Try breaking discussions into smaller groups, allow confidence to build
- ~ One-on-one, informal meeting to discuss their interest areas – you might find a willing back-office volunteer with professional skills








Engagement Strategies

Remote Members – can't or won't attend events, you haven't met them face-to-face, may not feel they are as important as local members and they might feel disconnected, but are unlikely to let you know.

- ~ Provide platforms for communications e.g. webinars, e-newsletters, private chat rooms, Facebook Live etc suitable for remote / busy people
- ~ Include newsletter info from all members not just those who attend
- ~ Online member forum to encourage member to member interaction
- ~ Personalise web-page and social media, encourage blog posts etc
- ~ Ask for input – just because they can't engage in person doesn't mean they can't participate or contribute to the team effort

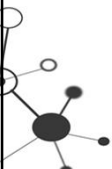





Engagement Strategies

Younger Members – don't alienate by focusing only on mature members, may not attend or volunteer now but are future volunteers / donors.

- ~ Consider a young member special interest group or board position
- ~ Stay active where they are i.e. social media but not just Facebook and use pictures, live video and member stories
- ~ Survey to identify topics they are most passionate about
- ~ Consider a mentor program to bridge the gap
- ~ Informal social networks can help understanding of what you do.







Member Engagement

Older Members – updated processes may cause change and disconnect older members who don't want to use social media, renew online etc.

- ~ Explain why processes are updated and how it will benefit members and the organization
- ~ Make a list of concerns, raise them at a meeting and ask for suggestions on how you should operate – gives voice and leads to understanding
- ~ Keep live events a priority and ask older members to assist
- ~ Create a VIP membership level to recognize membership milestones
- ~ Recognise, acknowledge and thank as most likely to contribute.




Member Engagement

Already Super-Engaged Members – no problems, attend events, respond to messages, volunteer when available, engage with others and advocate.

- ~ No need to do extra but they may be able to help with or find other members
- ~ Find out why they are super-engaged and try to copy it
- ~ What is there background; can you get more members like them
- ~ Use them as an ideal member profile to identify and promote others
- ~ Pair them with volunteer roles and check regularly to avoid burn-out
- ~ If they fit and are super keen consider a spot on the board
- ~ Implement awards recognition ceremonies and gifts; value their contribution



Make it Personal

There is never “one size fits all”.

Dig deep into your members’ motivators, opportunities, barriers and characteristics to tailor your engagement strategies for success.

Make it Personal

We’re so inundated with information it’s difficult for organisations to get their messages through, even when their members love them.

The most effective way to communicate is to have a conversation. That may be difficult but wherever you can find an opportunity or technical solution, such as Youtube or Facebook streaming, take the time to speak directly to members, giving them the messages you want to share and asking them to give feedback to you as well.



Review

- “ Stakeholders & Members Checklists
- “ Stakeholder Management
- “ Stakeholder Engagement
- “ Complaints Handling
- “ Membership Register
- “ Classes of Membership
- “ What Members Need to Know
- “ Engaging Members





Good Governance Consultants

www.GoodGovernanceConsultants.com.au

Leisa Donlan
leisadonlan@goodgovernanceconsultants.com.au
0414 932 095

Adrian Hart
adrianhart@goodgovernanceconsultants.com.au
0419 709 473

