



Business Filters for Association Decision Making

A "filter" is a way to assist volunteers and staff in making decisions. The facts are run through a set of questions - "the filter" - to insure the best interests of the organization.

Here are three different filters applicable to membership organizations. The first deals with *strategic planning*; the second with *endorsing benefits*; and the last focuses on *developing programs and activities*.

Strategic Planning Filter

Strategic planning sessions often result in new ideas. The enthusiasm of the moment can lead an organization down an unintended path - eventually wasting time and resources. Consider these five questions at the onset of strategic planning.

1. Does it fit *within the mission statement*?
2. Who is the *primary customer*? Will it sidetrack valuable resources from serving the primary members?
3. What is the *economic impact*?
4. Do we know the *needs of members*?
5. Does the program provide *value* or return on investment?

Endorsed Benefits Filter

Some programs receive an endorsement for promotion to members. Answer these three questions first. Like a tripod, if the product or program fails any one question, it will not stand on its own.

1. Do *members turn to the CHA for the benefit* - do they contact the association for that sort of service? The adage, "if you build it, they will come," seldom works.
2. Will the program offer a *distinct advantage to members*? Advantages are not always based on price but may include enhanced service or private access for members only.
3. Will the *organization receive adequate compensation* for the time, marketing, and liability associated with the endorsed program (without adding a risk of unrelated business income tax ?)

Programs and Activities Filter

New programs and activities are often considered to serve the needs of the members. They take the form of new meetings, publications, services, etc.

1. Is the program or activity of real importance to a *majority of members*?
2. Does the program or activity *significantly enhance operations or profitability of members*?
3. Is the program or activity *within the bounds of our mission, vision, values, bylaws, articles of incorporation and policies*?
4. Will the program or activity *drain or add* to the organization's resources? If it drains resources at the onset, what is the return on investment?
5. Does the program or activity *better position the* CHA?
6. *Can the program or activity be protected as an exclusive offer by the organization or will similar programs dilute it?*

Filters are a way to maintain the integrity of the organization. They are built upon the CHA's mission, members' needs and sound management principles.

Contributed by CHA/CSHAE