

ASSOCIATION SUCCESS STORY



PROJECT

Membership Engagement

including as many voices as possible in the global conversation about the importance of facilitation to groups and organisations everywhere.



SUCCESS ACHIEVED

Membership numbers continue to grow worldwide and we are increasingly able to deliver to professionals in their native languages, increasing the net of professional we can offer our services.



ORGANISATION

International Association of Facilitators (IAF)



DATES

January 2016 - Ongoing



CATEGORIES

Membership Engagement



Members

IAF members vary in their facilitation practice. Some are new to the field, while others have years of experience. Our members work in government, corporate, non-profit, education, community, and international development sectors, to name but a few. Some work in-house, others operate as external consultants.



Figure 1 Membership

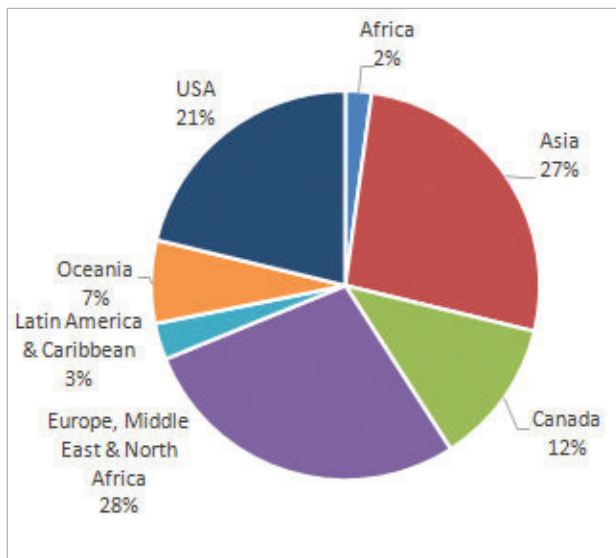


Figure 2 Percentage of International Members



Association Project team

OVERVIEW:

- » Board of Directors
- » TRANSLATIONS:
- » Hector Villarreal, Regional Director for Latin America & Caribbean
- » Taiwan Conference Volunteers
- » Portuguese Special Interest Group
- » Regional Volunteers

MANDARIN CERTIFICATION ASSESSMENTS:

- » Cameron Fraser, Director of Professional Development
- » Lindsay Sumner, Director of Operations, Certification
- » Ajit Kamath, Regional Director for Asia - 2016

WORLD BANK ADJUSTED FEES:

- » Beatrice Briggs, Director of Memberships & Chapters
- » Peter Van Kamanade - GUSTO
- » Asuf Ishaq - GUSTO
- » Managing Matters
- » Member Volunteers
- » Regional Directors



Introduction

IAF is a participatory organisation with members in more 70 countries who vary in their facilitation practice. Some are new to the field, while others have years of experience. Our members work in government, corporate, non-profit, education, community, and international development sectors. Some work in-house, others operate as external consultants. Majority of our members have previously belonged to North America & European Regions, the latter being our largest in numbers. In recent years we have seen massive growth in Asia which is now almost as large as Europe & Middle East region. In 2010 our total membership was around 1233 worldwide. Our current membership is at 1710, a 38.6% rise over the last 7 years.

We have engaged our members through a strategy of inclusivity and embracing their diverse backgrounds as professionals. Our members engage with us from their local chapter events, all the way up to participation in Regional boards, Global Conferences, International

Facilitation Week, Facilitation Impact Awards and they also pay membership fees adjusted to their country's WB classification. The association also hired a new association management company last year in order to expand capability to deliver to our large membership in a more agile manner.

Objectives

The objective of our engagement has been to become more inclusive and embrace the diversity of our membership.

As an organization we want to support the growth of our members and their professional. The board decided in 2015 to adjust our membership structure in order to make it more feasible for members in lower income countries join. Membership fees were adjusted to be in accordance with World Bank economic classifications.

IAF has also incorporated its other languages in what we offer as a professional association. We realize that as an international association, our members work in a variety of languages and are incorporating translated versions of critical documents as well as offering our certification in other languages to encourage participation and including facilitators across the globe. Our core competencies, which guide our international certification program, are now also available Dutch, French, Mandarin, Spanish, Polish and Portuguese. Our plan is to take this to the next step and offer our certification assessments in all these languages as well beginning with Mandarin.

Background

The basic idea for our strategy was developed from our membership survey conducted in 2010 that laid the foundation of this engagement. The survey sent out using Survey Monkey to our existing membership and the data collected signaled a need for IAF to do more to reach and connect with its members.

Our primary feedback has been through members that reach out to our Board members on a regular basis. There is also feedback received at the four global IAF conferences that are held in the year, and many more chapter and regional conferences where that feedback from members at conferences where professionals/facilitators regularly meet to learn new techniques and methods in the field of facilitation.

Feedback was also received from our chapter and regional board that frequently meet and run a lot of events on the ground for the association and are in many cases the first point of contact for facilitators.

Activities

WORLD BANK'S ADJUSTED FEES

Activities:

- » A working group of board members & members at large was set up to begin the process and reached out to targeted focus groups to get feedback.
- » A survey to members in general was sent after later in 2014 with a final confirmation that we are moving forward with the idea and to get suggestions from members. See *Figure 3 & 4 Members Survey*

- » Motion was presented to the board after feedback from members at the chapter and regional level
- » Once the new website was tested and launched, the implementation of the new fee schedule was started.
- » Guidelines for the new membership fee structure and categories was sent to GUSTO in order to begin the technical planning and implementation.
- » Updated data was downloaded from World Bank's website and added on the back end to base the new registration fee options.
- » Once in place, GUSTO, Board Members and Managing Matters were involved in testing of the new updates on a development server to ensure a smooth transition to the live website.

Schedules and Procedures:

- » The board discussed the conceptual idea at its annual Face to Face meeting in 2014. Its launch was delayed to make sure a new website was in place first.
- » GUSTO and Membership Director began working on the implementation process in October/November of 2015 with a 2016 launch
- » New communications and procedures were put in place especially for member's requests discounted memberships.

Materials Produced:

- » Updated Reports in the database to include the new membership categories.
- » Documents on policy and procedures were updated with the new policies. See *Figure 6 Members Infographic*

Effort (time spent - days/weeks):

- » Process of final implementation was around 6 months from September 2015 till February 2016

MULTIPLE LANGUAGES

Activities:

- » IAF Chair and Regional Director for Asia started on a pilot project to translate documents and submitted a report afterwards on what worked and what did not.
- » First test was a simultaneously translated assessment in Japanese in 2014 that was successful.
- » Afterwards the board put out calls for translations of documents and people volunteered for the translation work.

Schedules and Procedures:

- » Translated materials were added online for our members as received and promoted through our monthly updates.

Materials Produced:

- » Produced Certification Application in Mandarin, Dutch and Spanish for applicants.
- » CPF Core Competencies were translated and made available in Mandarin for candidates ahead of time.
- » Final Assessment Reports were sent to the candidates in Mandarin by their assessors. See *Figure 5 Mandarin Assessment Report*
- » CPF Core competencies were also translated into Dutch, French, Spanish, and Portuguese & Polish.

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Effort (time spent – days/weeks):

- » CPF Assessments are a 6 month process, from initial application to the actual assessment event day.
- » Translations projects are ongoing and done as demanded by our members.

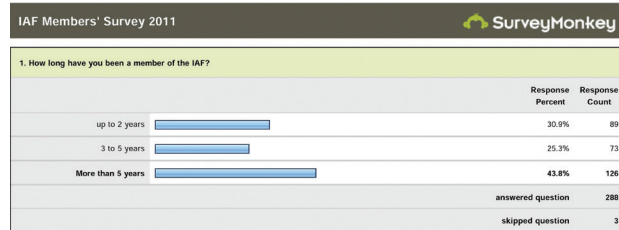


Figure 3 Members Survey example

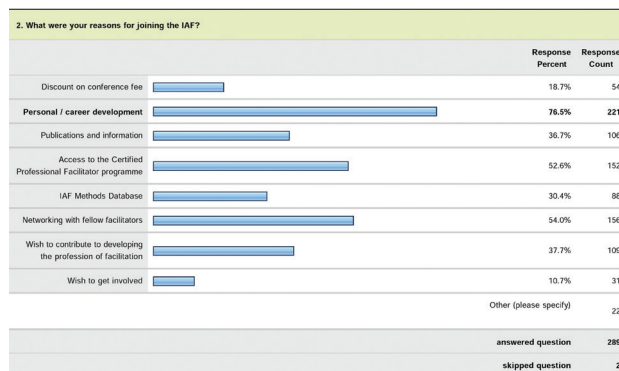


Figure 4 Members Survey 'Reasons for joining the IAF'

國際引導者協會 專業引導師認證 候選人評估報告

候選人: 陳秋潔 Amy Chen

評審員: 王基茵 Lilian Wang CPF (香港), 吳若杏 Jorie Wu CPF (台灣)

研討會評審員-觀察員: 許逸蓮 Laura Hsu CPF (台灣), 任俊賢 Yvonne Yam CPF (香港)

流程管理員: 黃俊星 Ng Choon Seng CPF (新加坡)

評估日期: 2016. 8.30

獨立觀察員: 謝永吉 Peter Seah CPF (新加坡)

地點: 花蓮·台灣 Hualien Taiwan

評估結果: DEFER 未通過

Figure 5 Mandarin Assessment Report

3. 有效管理多次活動

- 與客戶約定工作範圍及可達成之成果
- 發展活動計畫
- 成功完成活動
- 根據階段性評估客戶滿意度

客戶訪談: Amy 在客戶訪談中，提出不少關於組織發展、架構、文化等問題，有關客戶期望的成果/品質，她可以承擔一些問題，例如：客戶對工作時的「滿意」或「成功」的標準，客戶期望看到怎麼樣的產出（可以舉出本/格式案或產出此訪談的要求）。

訪談1: Amy 以三個現象觀察客戶的滿意度：1) 在過程中參與者是否積極地參與在互動/設計/流程當中，不會有太多阻礙；2) Outcome 的產出是超乎參與者的期望的，符合 sponsor 在訪談提出的要求；3) 工作結之產出給客戶的結果報告（觀察、建議）讓客戶覺得受用，並觀察到他們沒有留意到的地方。評審員也問 Amy 在給予客戶報告的時候的角色是什麼，她說自己是觀察者/顧問。



About the IAF

The International Association of Facilitators (IAF) is a participatory organization with members in more than 70 countries. Formed in 1994, we are a professional association that set internationally accepted industry standards, provide accreditation, support a community of practice, advocate and educate on the power of facilitation and embrace the diversity of facilitators. From our rich history of participatory development we have created foundational tools of the facilitation profession, such as IAF Statement of Values and Code of Ethics and the Core Facilitation Competencies.

We welcome everyone with an interest in facilitation and its widespread use in helping people work together effectively. Our members vary in their facilitation practice. Some are new to the field, while others have years of experience. They work in government, corporate, non-profit, education, community, and international development sectors, to name but a few. Some work in-house while others operate as external consultants.

Today, the Association is growing worldwide, fueled in large part by the growth and activities taking place within national and local IAF Chapters. And at the forefront of our growth is Asia!



Membership Benefits

- Permission to use the IAF member's logo on your website, business cards, email, blog and other promotional materials.
- Subscription to the IAF's Global Flipchart, a quarterly newsletter for members about the latest trends, activities and developments in the field.
- Submit any of your publications, relevant to facilitation, to be listed on our website.
- Special rates and advance registration options for the IAF's exceptional global conferences, as well as regional and local events.

"It is my professional tribe. A place where I meet colleagues sometimes with similar and sometimes with different backgrounds and ideas of facilitation, a continuous source of inspiration, an incredible way to meet peers from all over the world and exchange our knowledges and practices. A gym in which I learned the importance to give and take. The more I give the more I receive from my wonderful colleagues."

- Gerarda de Luzenberger, Director, Genius Loc facilitation and development

"The first time I went to an IAF conference in 2004, I was at a table with several 'strangers'. I was absolutely in awe of a colleague who would converse with me in English, turn to his left and speak in French and then turn his head to the right and speak in Spanish! We were all part of the same conversation and it has stayed with me ever since. It's amazing to me to be a part of an association that makes me want to be better at what I do for myself, my clients, my community and by extension the world!"

- Gillian Chambers, Training Consultant/ Facilitator, Jamalysha Training Co. Ltd

- An opportunity to nominate your clients for the IAF Facilitation Impact Awards
- Access to the IAF Members Directory, a worldwide network of facilitators
- All members may add their facilitation-related resources to the IAF Online Knowledge Centre & Methods Database
- Ability to join a local IAF chapter or branch, and if none yet exists, support to create one.

"As a founding member of IAF and currently active member, I am very pleased with the way that the organisation is carrying out its mission. The original intent in founding IAF was to clarify the profession of group process facilitation as distinct from training and consulting. In its development of clear competencies of a group process facilitator and its carefully designed performance-based certification process, IAF has made it clear that there is a distinct profession of facilitator. Various other projects, such as the Facilitation Impact Awards and worldwide Facilitation Week events strengthen public perception of the field. I am proud to have been part of the creation of this profession through IAF."

- Jo Nelson, Principal, ICA Associates, Inc.

- IAF Certified™ Professional Facilitators are listed in a searchable online directory for clients.
- IAF members can apply to have trainings assessed and publicly listed as an IAF Endorsed™ Training Program.
- Participate in member-driven initiatives that work to promote the power of facilitation worldwide.
- Take advantage of requests for facilitators posted on our Facilitation Marketplace
- Participation in your region's leadership team, news and events.



Figure 6 Members Infographic

Contact us for more information
office@iaf-world.org

facebook.com/IAFacilitators
@IAFacilitators

Sign up today! iaf-world.org/site/join

Promotion

As an international association, we are restricted to use online methods and tools to reach to our membership.

» Our primary method of reaching out to our members is through our website. Content, updates, events and offers posted on our website are communicated to our members by our monthly update, our Global Flip Chart. See *Figure 7 IAF Global Flipchart*. The IAF Global Flipchart is our quarterly member's publication with tips, tricks and resources for individual facilitation practices and ideas to help members to build their facilitation business and impact.

» In addition to regular updates, emails are sent to members regarding events and initiatives that only apply to specific section of members or a certain geographic region. See *Figure 8 Profile Update Email - Africa* and *Figure 9 Chapter Meeting Email*

» IAF has four social media channels that are also used to engage members. These include:

Facebook Page (1839 Likes) - <https://www.facebook.com/IAFacilitators>

Twitter (2941 Followers) - <https://twitter.com/IAFacilitators>

LinkedIn Open Group (4408 Members)- <https://www.linkedin.com/groups/1913330>

LinkedIn Members Only Group (575 Members) - <https://www.linkedin.com/groups/8293796>



Figure 7 IAF Global Flipchart

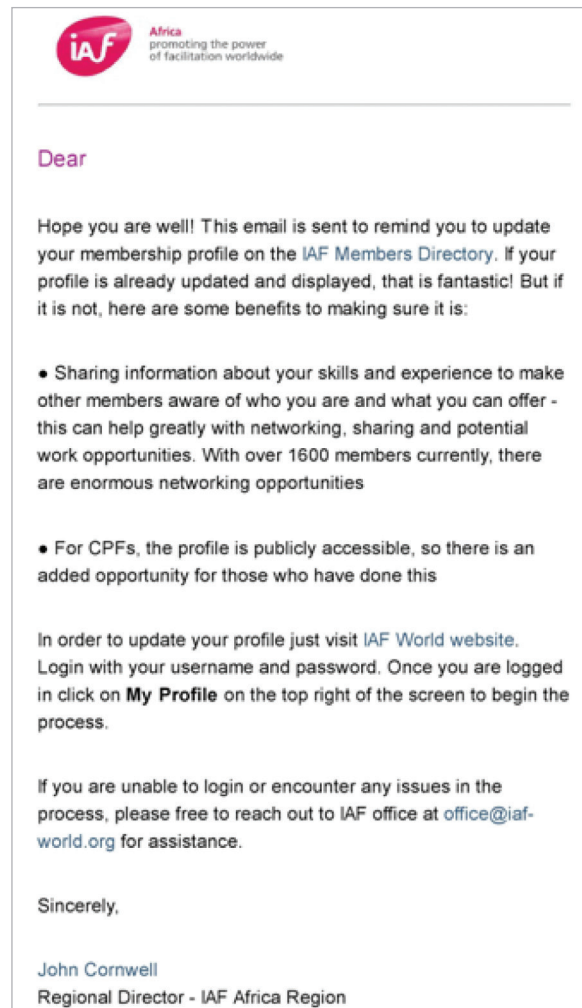


Figure 8 Profile Update Email - Africa

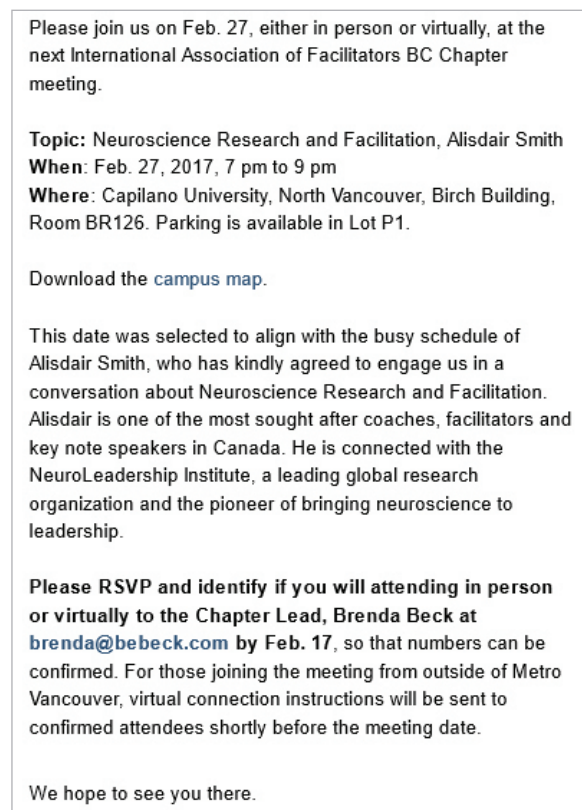


Figure 9 Chapter Meeting Email

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Tools & Systems

The new fee structure was approved by the board & implemented in our CMS.

We reached out to our members through our CMS in an email campaign, CiviCRM and let them know about the implementation of the new membership fee structure that would assist members from lower income countries.

We use Basecamp for any association projects and all updates made to the website were managed by the Board liaison, GUSTO and Managing Matters as a project tracking list of to-dos and making sure the final product was available on time for our members.

In addition to the attraction of adjusted membership fees for their regions, we continued to offer our membership benefit that our members have found to be helpful over the years. The board approved the creation of special interest groups based around languages across borders by technology. We have implemented and volunteer engagement strategy whereby including our members in the activities of the association and encouraging participation. We continue to hold our International Facilitation Week worldwide and our Methods Database which continues to attract members and beyond the monetary gain.



Partners

The primary third party that assisted in implementation of our program are Managing Matters – our association management company, based in Toronto – and GUSTO that designed our database and website.

The critical updates to the website and database were made by GUSTO to allow members to pay the membership fee based on their country's World Bank economic classification. On the front end, GUSTO added the process whereby membership fees are paid based on country of residence and on the back end the update was made to integrate these different rates with rest of the database processes.

Managing Matters helped in adding translations to critical documents online. They also assisted with the planning and execution of the first Mandarin based certification assessment held in Taiwan this year.

Last third party are groups of volunteer that helped with a lot of the translated materials that are currently on the website.



Challenges

- » There was a significant amount of time spent to make sure the backend updates were made in time to launch the program.
- » There was some push back from members in higher income countries trying to get lower income fees
- » We had to turn away some candidates for the Mandarin assessment due to conflicts of interest between assessors and candidates. This was largely due to the small pool of Mandarin assessors.
- » While we do not have a budget for translations, we have relied on volunteers to translate critical documents. Turn around is longer but the translations are better as they understand the field and context of the contents.



Results

ACHIEVEMENT OF OBJECTIVES:

- » IAF continues to enjoy membership growth, which currently stands at 1710. Membership is now more affordable in lower income countries, where facilitators can take advantage of our services at lower cost.
- » We continue to grow our engagement with them online with frequent updates for fellow professionals.
- » By being more inclusive we have seen a rise in the number of volunteers looking to assist in association events and initiatives, with over 170 that were recognized by certificates of appreciation. Many of them responded back with willingness to continue their service as volunteers, creating a pipeline of future global board members that are ready to promote and support the field of facilitation.
- » Supporting growth of members and their professional development across geographic regions as well as languages has increased the reach of IAF beyond the global restrictions of the English language

IMPACT

The impact of our strategies has been an increase in membership from countries where the membership fee is now much more affordable.

We have seen a larger number of members willing to volunteer and assist in the planning and execution of association initiatives.

No. of recognized volunteers in 2016: 170

We have certified our first 6 facilitators in a Mandarin last year and hope to continue offering certification assessments in other languages in the future.

In addition, 23 certified professionals have taken advantage of our adjusted fee structure.

STATISTICS

| Membership | Number | Increase (%) |
|-------------------------------|------------|---------------|
| Membership at January 1, 2016 | 1,526 | |
| Membership at January 1, 2017 | 1686 | 10.48% |
| Renewals in 2016 | 649 | |



Figure 10 IAF Global Membership Growth 2016-2017

Social Media

| Social Media | Year | Number |
|--------------|--------------|-------------|
| Facebook | January 2016 | 987 |
| | January 2017 | 1700 |
| Twitter | January 2016 | 1700 |
| | January 2017 | 2048 |
| LinkedIn | January 2016 | 534 |
| | January 2017 | 575 |

FINANCIAL

- » \$10,000 CAD to Managing Matters a month in order to manage the operations of the association. (\$120,000 annually)
- » \$5040 USD a month to GUSTO in fees which provides us with crucial support to update online tools as well as implement critical changes to our service for members online. (\$60480 Annual)
- » \$5000 USD in translation of documents for our members last year.



Innovation

IAF continues to offer the same offer to embrace the diversity of our members, such as We are running another certification assessment event that will be held in Mandarin and we are looking to add multiple languages to our certification process.

An innovation that has come through our engaged membership is called Special interest Groups category that the board approved to be added into its structure. This recognizes groups of members that connect beyond geographic boundaries and have common interests, such as language. The first such Special Interest Group is the Portuguese speaking group that includes members from Brazil, Portugal, Mozambique and Angola. This is an extension of our strategy to engage our members and help them succeed professionally.

Our board has also approved a bursary program to assist professionals to get certified who are unable to pay the full fee for circumstances beyond their control.



What we would do differently

- » We would have more communication with our members about the changes coming out, make the roll out much more smoother from a customer service perspective.
- » Promote our idea and work more to raise profile of the association's efforts.
- » We would have conducted a PR and Marketing drive in the regions that benefit the most from lower membership fee rates.



Feedback and Testimonials

Feedback from membership has been largely positive, especially in members that are based outside the economic north.

More detailed feedback and testimonials are attached as a supporting document

Testimonials:

Hector Villareal Lozoya, Regional Director, Latin America & Caribbean - Partner and Chief Facilitator, Kunlaboro – Monterrey, Mexico

"In 2015 the IAF developed a membership fee structure based in statistics of the World Bank regarding country development and economy size. This helped us provide membership opportunities to prospective facilitators in middle and low income countries that before just couldn't afford that type of investment reducing the fee in half or even less. Prior to it, Regional Directors such as myself would have to devote time to answer messages from interested facilitators requesting special discounts according to their economic condition. It is my belief we enhanced our reach attending to the needs of the professionals we seek to represent."

Email: hector.villarreal@kunlaboro.lat

Figure 11 Testimonial - Mexico

Vinay Kumar, Regional Director for Asia - Director and Principal Consultant, C2C Organizational Development Pvt. Ltd. – Bangalore, India

"The IAF board showed a lot of global understanding in making the tiered fee schedule last year. This allowed professionals and budding facilitators from many developing economies to become members of the IAF and leverage the professional development opportunities. The special circumstances fee allows individuals with genuine circumstances to continue or be a part of the IAF. Overall this tiered fee structure has provided many people the opportunity to be part of the community of IAF and not just increased the membership but also added to the diversity of the community"

Email: vinay@concept2competence.com

Sean Xiao, Chair, IAF Shanghai Chapter – Consultant, TeamPlus Solutions – Shanghai, China

"Thanks to the IAF on offering the Mandarin Assessment in Seoul 2017, there are already 10 members who have reached me for the participation and I am communicating with them how to go for the next step. This assessment in Mandarin has helped the promotion of Facilitation standard in China, helping the local member professionally, and offering recognition to those quality facilitators with more acceptance in the market."

Email: seanxiao@teamplussolutions.com

Figure 12 Testimonials - India & China

**THE ASSOCIATION SUCCESS STORY
PROGRAMME PROMOTES BEST PRACTICE AND
NEW IDEAS IN THE ASSOCIATION COMMUNITY.**

For more information visit
www.associationexecutives.org/success



THE ASSOCIATION OF
**Association
Executives**