The Association Ecosystem

A Systems Perspective on Organizational Effectiveness

ASSOCIATION TRANSFORMATION THE PODCAST

September 2024

ELEVATED

BREWER PRATT SOLUTIONS

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ABOUT ASSOCIATION TRANSFORMATION

Launched in July 2020, the Association Transformation podcast was conceived as a direct response to the membership sector's need for information, dialogue, guidance, and support during an unprecedented period of disruption and uncertainty. Recognizing the inherently global nature of the membership sector, the podcast is a transatlantic conversation between co-hosts Elisa Pratt and Andrew Chamberlain and is intended to advance the impact and evolution of non-profit organizations. We always seek diversity of thought and new examples of innovation in action; and across five seasons we have hosted 90+ association specialists from the global sector across 100+ recordings, taking a deep dive into the current issues, emerging trends, leadership challenges, and business opportunities facing the international association community. Irrespective of subject matter, we always aim to share practical ideas, knowledge, and support for the long-term benefit of association chief executives, c-suite nonprofit professionals, and volunteer leaders. Our conversations cover a diverse compilation of subjects relevant to association leaders across the globe, ranging from mental health and wellbeing, the climate crisis, and DEI to membership recruitment and retention, financial strategy, and governance practice.

DISCLAIMER

"… dividing the cow in half does not give you two smaller cows. You may end up with a lot of hamburger, but the essential nature of "cow" — a living system capable, among other things, of turning grass into milk — then would be lost. This is what we mean when we say a system functions as a "whole". Its behavior depends on its entire structure and not just on adding up the behavior of its different pieces."

Dr Draper Kauffman, 1980

INTRODUCTION

Associations are working harder than ever to define their value proposition within complicated socio-economic environments, and their need to advocate, influence and respond to circumstances has never been more urgent and necessary. In these uncertain times all associations, irrespective of their memberships' context, are striving to operate at peak efficiency and effectiveness, and to support their members in increasingly fragile socio-economic and political environments. Indeed, perhaps for the first time in generations, associations must be wholly pragmatic in ensuring they add durable value to their members' professions, industries, and communities. Within an extraordinary multitude of contexts, associations face increasing expectations from across a widening spectrum of interested parties, ranging from members, directors, and staff, to sponsors, policymakers, and industry stakeholders.

Accepting that uncertainty is inevitable is core to an association's success; but so too is understanding that there is always opportunity to shape and control the association's direction, and not merely respond or react to circumstances. Leadership teams must be willing to improvise and recognize that in a world where uncertainty is high, changes of direction may be frequent, and rapid responses may be required. To do so, it is necessary to replace traditional linear approaches to decision-making, and to address the complexities of association management through nonlinear methods that better respond to the dynamics of the association sector, such as a systems approach.

The systems approach to association management is all about looking at the interactions between different elements of a system (the association), rather than each element in isolation. This holistic approach to identifying solutions to challenges and opportunities can be especially effective when applied to certain areas of association management. By looking at how the constituent parts of the association function together, managers and leaders can uncover hidden relationships, anticipate unintended consequences, and develop more sustainable solutions for their value proposition, as well as realizing resources efficiencies within their operations.

The systems approach to association management, might sound like clunky, corporate jargon but at its heart, it is about seeing things through a wide lens. It's about recognizing how everything within an association is connected and how, to a greater or lesser extent, everything is dependent on the successful function of everything else within the association (the system) to ensure success. Actions have consequences, not always the ones intended, and while the systems approach can be applied to solving problems, it can more widely be used to define and deliver the value proposition in ways that are beneficial to the whole organization, not just one piece of it.[1]

DEFINING A SYSTEM

Systems are absolutely everywhere, of all manner, shapes, and size, from the intricate workings of your body (nervous, neurological, digestive, cardiovascular etc.), to the infinite possibility of space. To define a system, it must be both dynamic (constantly changing) and evolving (having emergent properties). It must be connected to elements, actors, agencies, nodes, stocks or 'parts,' and have a boundary. The edge of the universe is perhaps one exception to this, but we can still define a solar system by the boundaries of a constellation.


1. Forbes, 2024
2. Acaroglu, 2017

The systems theory of management asserts that any organization is a single, unified system of interrelated parts or subsystems. Each part of the overall system is dependent on the others and cannot function optimally without them. Therefore, if factors are present that adversely affect one subsystem within an organization, it is likely that these factors will adversely affect other subsystems, too. This can result in variable impacts on the entire system.

Also known as the systems approach, this theory presents an organization as a natural ecosystem, where each element is interdependent. Various components of a system interact with each other regularly, which is true in any modern organization, although this invariably happens in different ways, depending on the structures and cultures of the organization. For example, a finance team is a subsystem of an association and probably interacts with every other subsystem. The same principle applies to the marketing team, albeit the nature of its interactions will be different: whereas the finance team will liaise with the IT team to arrange the purchase of software, the marketing department team will interact with IT to arrange the use of the software. In this simple example, if the finance team fails to provide IT with sufficient funds to buy the software, then the marketing team will be unable to fulfil its role because it lacks the software to do so; and if the marketing team cannot reach the association's audience, then the finance team will issue fewer invoices and ultimately have less funds available for future budgets. Thus, whilst their specialist focus may differ, as subsystems of the same association, the finance, IT, and marketing teams are deeply connected, with each relying on the other to ensure the association, as the whole system, functions as it should.
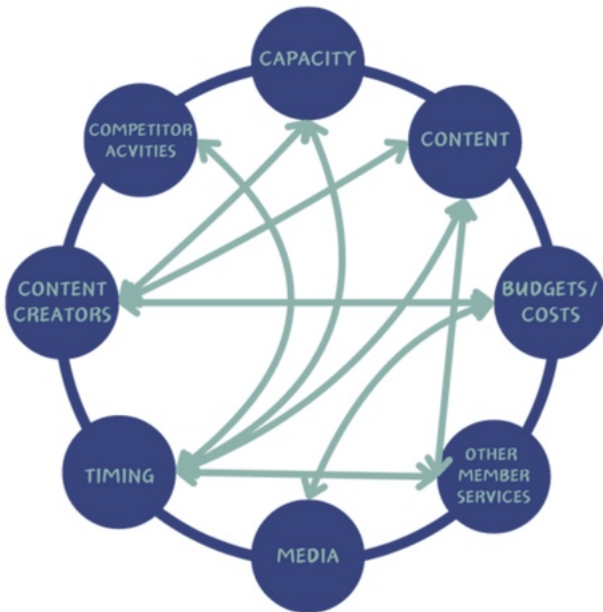
THE ASSOCIATION AS A SYSTEM

Every membership organization is a complex ecosystem of people, structures, relationships, and priorities, and as such it makes sense for leadership to encourage a systems approach to association management, and to reflect that approach in their own decision-making, oversight, and scrutiny of performance. For example, in terms of day-to-day operations, if we consider the act of composing and emailing a monthly newsletter: the association has news and ideas to share, it has products and services to sell, and it wants to use the newsletter as one of its regular touchpoints with its membership. Ostensibly, this a relatively straightforward proposition, especially if we consider it as a linear process, which is characterized by a sequential progression through distinct phases, such as planning, design, distribution, evaluation, etc.
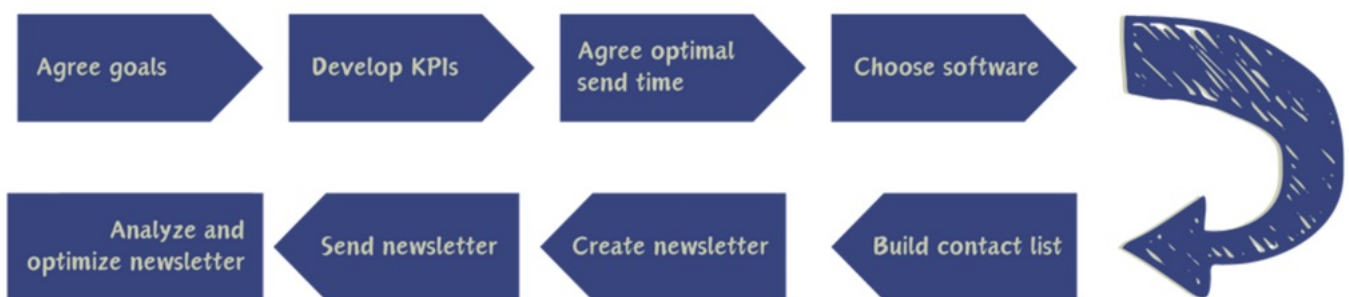
A linear process follows a step-by-step, cause-and-effect approach, with the view to delivering a specific output (the newsletter) and realizing a specific outcome (an informed membership). A linear process has impact. In this scenario, members are informed, sales of services are maintained or increased, and members feel connected to their association. The linear process has served its purpose. If however we consider the same activity, but this time as part of a systems approach, then the process of composing and emailing the newsletter becomes a more deliberated practice. The task is no more time-consuming and no more of an administrative burden, but the decision-making process about what, how, and when to communicate is arguably more intentional and serves to further enhance the membership experience, support more effective internal resource management, and underpin the success of the association's other subsystems.

3. Indeed, 2023

COMMUNICATIONS STRATEGY
CONNECTION MAP for MONTHLY NEWSLETTER

CAPACITY

COMPETITOR ACVITIES

CONTENT

CONTENT CREATORS

BUDGETS/ COSTS

TIMING

OTHER MEMBER SERVICES

MEDIA

The systems theory of management asserts that any organization is a single, unified system of interrelated parts or subsystems. Each part of the overall system is dependent on the others and cannot function optimally without them. Therefore, if factors are present that adversely affect one subsystem within an organization, it is likely that these factors will adversely affect other subsystems, too. This can result in variable impacts on the entire system.

Even in this basic example, recognizing the connectivity of the association's subsystems and reflecting those connections in decision-making will realize significant value for the membership as well as major efficiencies in the association's operations.

COMPONENTS OF THE ASSOCIATION SYSTEM

In accordance with the systems approach, an association's system has five central components that allow it to function:[4]

1	Environment	The environment of an association's system is the setting or location in which it operates. This dictates the resources the association has to access the environment, the relationships the association has with other systems, and the nature of the association's activities. This is the country, region, county or city in which the association operates. It is also the industry, profession, and/or specialty of market that the association is working to lead, serve, and/or influence.
2	Inputs	All association systems function to create and deliver membership products and services. To do so, an association requires external inputs to enable it to conduct certain processes, including from volunteers, suppliers, and other specialists. An association typically sources its inputs from its environment.
3	Transformation Process	Once an association acquires the necessary inputs, it can begin working to create a membership product or service from them. This is the transformation process and often represents the primary activity of the association's system, where it combines the labor of its staff with other inputs to produce the desired output. This also requires the use of tools, which it may also acquire from the environment.
4	Outputs	Once the transformation process is complete, the association has successfully produced its outputs. These are primarily the membership products and services that it intends to take to its market, which is part of the association's external environment.
5	Feedback	The final component of a properly functioning association system is feedback, which is derived from certain internal and external elements, like member reviews, quality assurance audits, and financial results. The information that an association derives from feedback enables it to alter its input requirements, such as new source materials, alternative learning products, new subject matter experts, or the use of different technologies. Although it primarily affects inputs, this feedback might also have an indirect effect on an association's transformation process.

4. Ibid

THE TRAP OF TUNNEL VISION

Leadership theory is inundated with discussion as to what and who makes a good leader, with debate constantly ebbing and flowing and exploring whether certain personality traits make people better suited to leadership, or if characteristics of a situation make it more likely that certain people with take charge. Early leadership theories focused on what qualities distinguished leaders from followers, whilst subsequent theories have developed other variables, such as skills levels, experience, or circumstances; and whilst many theories continue to emerge, most can be classified as one of eight major types:[5]

1. **"Great Man" Theories**: According to these theories, great leaders are simply born and the capacity to lead is inherent.

2. **Trait Theories**: Assume that people inherit certain qualities or personality traits that are necessary to lead.

3. **Contingency Theories**: Focus on situational variables, suggesting that effective leadership requires the correct balance between behaviors, needs, and context.

4. **Situational Theories**: Propose that different leaders will emerge in response to different circumstances.

5. **Behavioral Theories**: According to these theories, great leaders are made, not born, and thus people can learn to become leaders through teaching and observation.

6. **Participative Theories**: Suggest that the ideal leadership style is one that takes the input of others into account.

7. **Management Theories**: Also known as transactional theories, these focus on the role of supervision and base leadership on a system of reward and reprimand.

8. **Relationship Theories**: Also known as transformational theories, these suggest that leaders motivate and inspire through meaningful connection with their followers.

Arguably, every one of these theories assumes a leader's ability to survey and assess the big picture and, irrespective of an individual's leadership style, there is an implicit expectation that an organization's leaders will see patterns in complex problems, focus on the larger goals and overarching strategies, consider the potential implications of their decisions, and inspire others with their vision, passion, and optimism. Yet, 'tunnel vision' is a common criticism of leadership teams, especially in the association environment, where the leadership model is intentionally biased toward volunteer boards as the primary decision-makers and accountable entities within their association:

> Tunnel vision is a failure to see the big picture; it can afflict leaders, causing them to focus on a particular outcome and to filter all information and evidence through the lens provided by that outcome. This may result in the leader concentrating on a single idea to the exclusion of all others. Any information that supports the adopted idea or outcome is elevated in significance, while evidence inconsistent with the idea is discounted or overlooked. Tunnel vision can be detrimental to the strategy, engagement, and problem-solving initiatives of a leader.
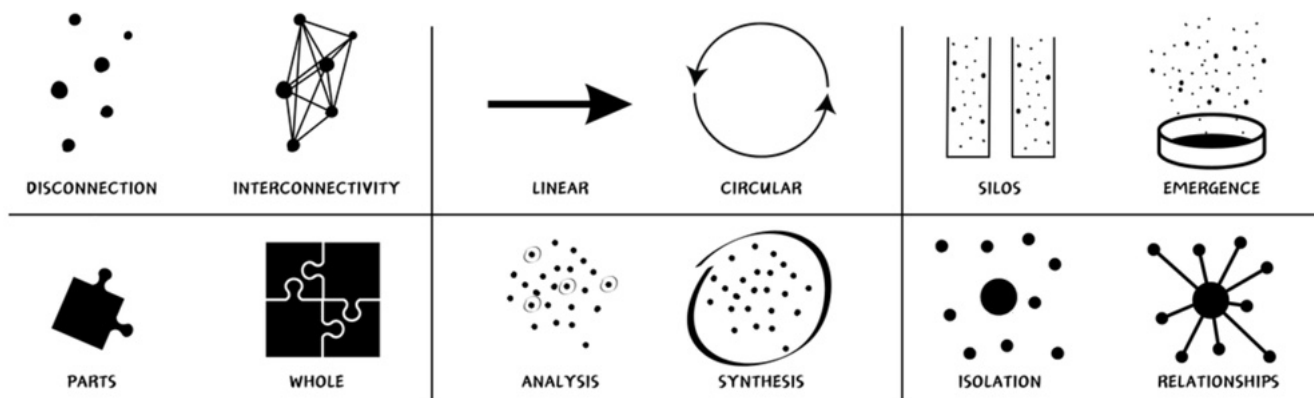>
> Decker & Mitchell, 2023

There are many reasons for tunnel vision: Leaders sometimes think and operate linearly, or get so involved in a project or problem that they neglect to see what is going on around them; they often respond to whoever is making the most noise; they go into "crisis mode" and focus on one problem until it is fixed, often to the detriment of all other activities; or they are simply inexperienced in their leadership role and lack an understanding of what is required of them, and so they instinctively revert to their operational comfort zone, where they understand the practicalities and consequences of decision-making. In the membership sector, tunnel vision usually manifests as excessive attention to operational detail from volunteer leaders; and in extreme circumstances this can lead to micromanagement, tightened control, and a board failing to function as a governing body and instead operating as the de facto management team.

In response, we hear the familiar cry for "eyes in, hands out", and an appeal for leadership to focus on the big picture and to apply strategic thinking for the benefit of the whole organization. This however implies that by virtue of being a strategic thinker, a leader can recognize their association as being a system, but strategic thinking is not the same as systems thinking, albeit the two are intrinsically connected.

STRATEGIC THINKING -VS- SYSTEMS THINKING

Strategic thinking is the ability to focus on the ultimate goal and work backward to ensure the alignment of actions to this goal. Strategic thinking disrupts the incremental pattern of traditional problem-solving to open a space for new thinking to thrive. By orienting thinking to longer-terms goals, strategic thinkers ensure the deeper exploration of stakeholders, new alternatives and possibly a reexamination of options previously dismissed.

Strategic thinking isn't optimized however without systems thinking.[6] Orientation to or awareness of the whole rather than a singular event or activity is central to successful strategic planning and decision-making. When planning and leading strategy it is vital that association leaders consider how strategic outputs may be influenced by or have an impact on existing systems, or how new systems may be required to realize strategic objectives.

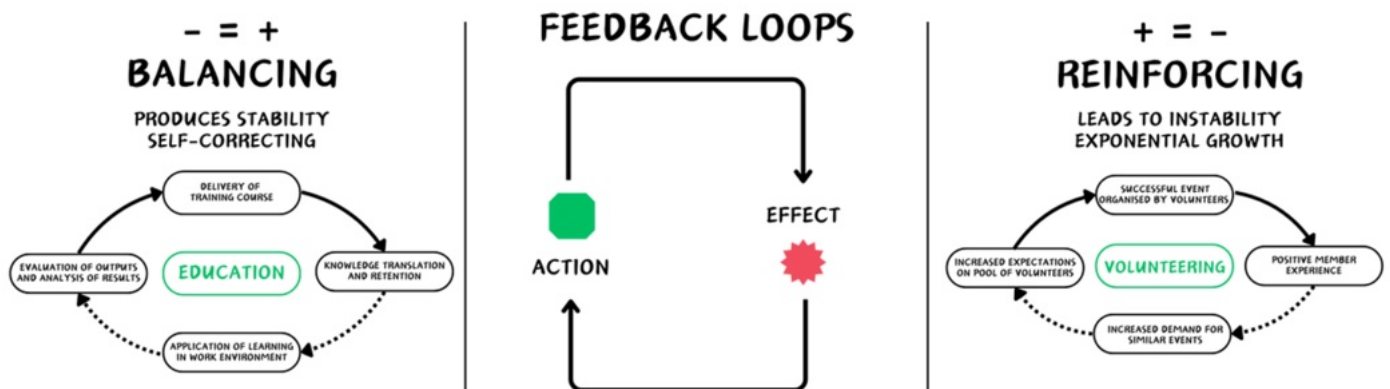| DISCONNECTION | INTERCONNECTIVITY | LINEAR | CIRCULAR | SILOS | EMERGENCE |
| PARTS | WHOLE | ANALYSIS | SYNTHESIS | ISOLATION | RELATIONSHIPS |

Source: Acaroglu, 2017

In juxtaposition to the silo effect, systems thinkers recognize that the component parts of a system can be best understood in the context of their relationships with each other and with other systems, rather than in isolation.[7] There are six key elements to creating a systems thinking mindset: 1) interconnectedness; 2) synthesis; 3) emergence; 4) feedback loops; 5) causality; and 6) systems mapping.[8]

Interconnectedness and synthesis relate to the dynamic relationships between various parts of a whole, the process of obtaining expected synergies between parts of the association. This includes the idea of circularity, which stresses the requirement of a mindset shift from linear to circular. Similarly, the concept of emergence relates to the outcomes of synergies that can come about as the elements of a system interact with each other in nonlinear ways. In the workplace, this often takes the form of the push and pull that happens due to organizational politics and competing priorities. Association leaders with a systems-thinking mindset will see this as an opportunity for enhanced collaborations and innovation.[9]

5. Cherry, 2024   8. Acaroglu, 2017
6. Biryulin, 2023   9. Westover, 2021
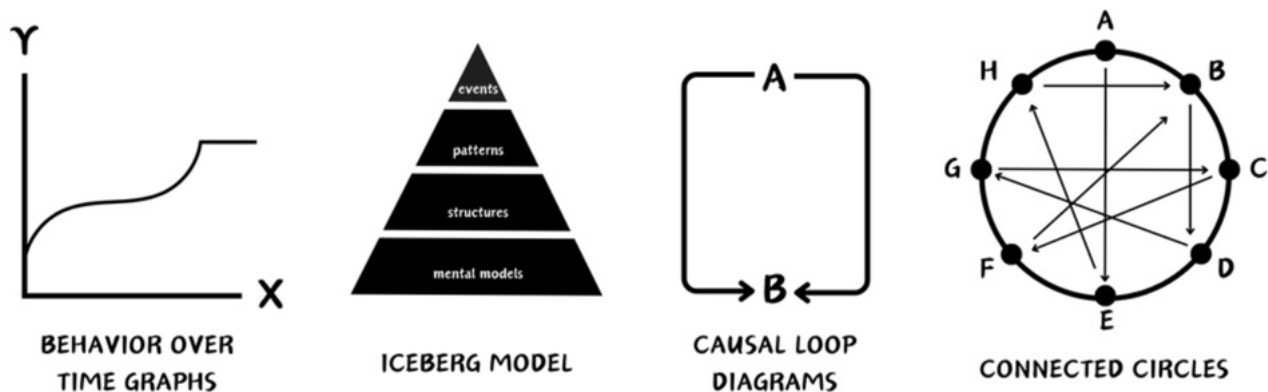7. O'Connell, 2021

Balancing and reinforcing **feedback loops** within an association serve as guidance for making adjustments as an association learns more about the interconnectedness of the elements of the system and their outcomes. Additionally, **causality** refers to the flows of influence between the many interconnected parts within a system, i.e., cause and effect. As association leaders better understand the causality and directionality of these elements, they will have an improved perspective on the many fundamental parts of the system, including relationships and feedback loops. A skilled systems-thinking leader will ensure mechanisms for multiple feedback loops are established and effectively communicated to their staff, volunteers, members, suppliers, and/or stakeholders as required. Furthermore, leaders and their teams will understand correlation versus causation as they use the data gathered from the feedback loops to enhance the association's value proposition, as well as internal workplace practices.

FEEDBACK LOOPS

– = +
BALANCING
**PRODUCES STABILITY
SELF-CORRECTING**

DELIVERY OF TRAINING COURSE

EVALUATION OF OUTPUTS AND ANALYSIS OF RESULTS

EDUCATION

KNOWLEDGE TRANSLATION AND RETENTION

APPLICATION OF LEARNING IN WORK ENVIRONMENT

ACTION

EFFECT

+ = –
REINFORCING
**LEADS TO INSTABILITY
EXPONENTIAL GROWTH**

SUCCESSFUL EVENT ORGANISED BY VOLUNTEERS

INCREASED EXPECTATIONS ON POOL OF VOLUNTEERS

VOLUNTEERING

POSITIVE MEMBER EXPERIENCE

INCREASED DEMAND FOR SIMILAR EVENTS

Source: Acaroglu, 2017

Finally, **systems mapping** is a tool that systems thinkers can use to identify and visually map out the many interrelated elements of a complex system, which will help them develop the interventions, shifts, or investment decisions that will change the system in the most effective way. By visually laying out the key inputs and outputs, all of the stakeholders, and the directions of the flows of information and influence, an association's leaders can visually start to see and more deeply understand the nonlinear complexity of the given system, which can help them make appropriate adjustments to workplace policy, practice and associated systems in their association.

TYPES OF SYSTEM MAPPING

BEHAVIOR OVER TIME GRAPHS

ICEBERG MODEL
events / patterns / structures / mental models

CAUSAL LOOP DIAGRAMS

CONNECTED CIRCLES

Source: Acaroglu, 2017

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10. Ibid
11. Acaroglu

THE APPLICATION OF SYSTEMS THINKING

By definition, systems thinkers think differently. They are excited by things that other people often cannot see. They will not just look at 'things' in a situation, but at the interactions between things and what happens as a result of those interactions. Rather than analyzing parts, a systems thinker gains a greater understanding of the elements and dynamics of a situation, enabling a deeper exploration into what obstructs, disrupts, delays, diverts or supports and encourages efforts to make change. They might explore purpose and identity, interconnections and interdependencies. They might focus on perception, projection, framing and bias, behaviors, assumptions and communication. They might look at interactions, influences and relationships. A systems thinker will explore how people in a situation collaborate and reciprocate. They are able to examine at both a micro and macro level to gain an understanding of both the situation and the context in which the situation is embedded. This helps them to understand why a situation and the people in it are or are not able to adapt to their complex, changing environment.

A systems approach can be applied to any number of situations, and is particularly suited to complex organizations, like membership associations. It can be used to diagnose weaknesses in an organization, to redesign membership services, design products and services from scratch, form strategy, make change, undertake evaluation, explore opportunities across organizational boundaries, and support efforts to create systems change. The systems approach to association management provides a framework for staff, volunteers, and suppliers to embrace creativity, to engage in critical thinking, and to apply fresh perspectives to problem solving, all of which are recognized as essential core skills required for success in the modern workplace.

What makes the systems approach applicable in association management, without overwhelming the practitioner, is the power of defining a system boundary. Without a clear boundary, there are infinite interconnected possibilities, which often overwhelms new systems thinkers.

> "It's the vastness — the seemingly endless possibility — that often trips up newbies and can make some brains explode (I often hear in workshops: "But if everything is interconnected, then there is no beginning or end, and I am one tiny person in this big infinite system and ahhhhh!")."
>
> Leyla Acaroglu, 2017

This is completely normal because after all, the reality is that everything is interconnected; but everything can also be defined by a function, purpose or potential in some way. A tree's system boundary can be defined by its bark and its myriads of ecosystem functions: to produce oxygen and store water, it is dynamically connected to the ecosystem that it draws energy and nutrients from and provides resources back into. Likewise, we are defined by our own skin. Inside our bodies, we are a complex array of systems that are all beautifully functioning to keep us alive. At the same time, are also connected to the same ecosystems that keep the tree alive.

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12. Roberts, 2023
13. Ibid
14. Ibid
15. Acaroglu, 2017

DEFINING SYSTEM BOUNDARIES [16]

Swimming pool and the ocean: When you first learn to swim, starting off in a pool that has clearly defined edges to grip and a shallow end gives you the confidence to explore and learn. The ocean, on the other hand, can be overwhelming and perceived as dangerous; but just because you're swimming in a pool doesn't mean you don't


know about the ocean. In fact, the ocean is often the end goal that you're working toward. So, as you build your systems mindset, start with a defined system boundary: a pool where you can determine the edges and know what you are dealing with before you jump into the ocean. Within an association context, think of a 60-minute webinar as the swimming pool, and a multi-day annual conference as the ocean. The webinar contains the same components as the conference: scheduling, speaker management, marketing, registrations, delegate communications, financial transactions, technology, possibly sponsor engagement, delivery, evaluation, and feedback. The conference (the ocean) has more subsystems and arguably carries more financial and reputational risk (which is why it can feel overwhelming and dangerous); but for the event manager who has developed and practiced their systems thinking as they progress from the webinar to the conference, the system boundaries of the conference are readily identified and confidently managed.

Thinking-in-telescopes: A systems thinker can think at both the micro element scale that can be seen inside a microscope, as well as the macro infinite possibility scale that can be witnessed through a telescope (all while having a firm view of the landscape around them). Being able to move through these scales from the micro to the massive, allows for a shifting of perspectives to build a 3-dimensional worldview. An association's value proposition is an excellent example of how to think-in-telescopes: a membership manager who is a seasoned systems thinker is able

to focus on the individual components of a specific product or service (the micro scale) whilst recognizing how it fits within the context of the wider experience of membership (the macro scale). For example, the publication of the biannual journal is a complex subsystem of the membership system, requiring a detailed focus on author management, submission processes, copyright permissions, peer review, style guidelines, layout, nomenclature, publication, marketing, etc. At the same time, the membership manager

must consider how the journal fits within the membership system, for example, identifying how the timing of publication links to policy and advocacy priorities; how journal content can influence the annual conference program; or how the journal's focus can underpin or reflect the content of education and certification; all of which combine to define the value proposition and the wider experience of membership.

Lensing: This is the ability to change perspectives in order to gain a 'below the surface' exploration, altering your angle or trying a different viewpoint to gain a divergent understanding of the world or the phenomena you are
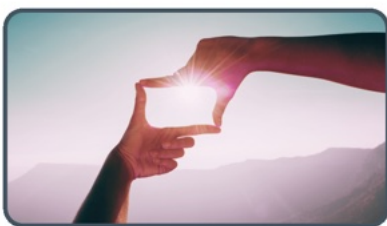
seeking to understand. From this different point of view, we can build empathy (which is the visceral experience of being connected to the lived experience of another), as it allows us to step outside the often-restrictive thinking that our own minds like to impose on us for safety and security. In an association context, the creation of member personas (fictional, generalized representations of an ideal member) provides this lens and offers an opportunity to better understand the needs and expectations of existing and prospective members. Through research, surveys, and interviews with target members, it is possible to create member personas that allow you to appreciate their distinct perspectives on how they value membership, making it easier to tailor the value proposition to the specific needs, behaviors, and concerns of different groups.

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16. Ibid

FUTURES LITERACY

UNESCO describes futures literacy as "...a universally accessible skill that builds on the innate human capacity to imagine the future, [which] offers a clear, field tested solution to poverty-of-the-imagination." [17] It is a capability that allows leaders to better understand the role of the future in what they see and do, and in how their organizations develop. Being futures literate and accepting that uncertainty is inevitable empowers the imagination, freeing us from the limitations of conformity, and enhancing our ability to prepare, recover and invent as changes occur.

The nonlinear nature of the systems approach to association management deftly underpins futures literacy, providing a valuable framework for leaders to recognize, welcome, and harness the power of uncertainty in defining their association's success. Being futures literate is a mindset that balances optimistic action with thoughtful pragmatism in order to envision possible futures, and being able to visualize those scenarios through a systems lens will make for a highly compelling approach to decision-making. Traditional approaches are no longer sufficient to prepare leaders or their teams to move forward when decisive answers aren't available. As a result, many associations are stuck, waiting for clarity, hanging on to tools, assumptions, and conventional wisdom that no longer serve them or their members well.

While uncertainty has always played a role in strategy, the early 2020s have made it abundantly clear that many tools and models no longer apply.[18] The speed, scale, and complexity of change continues to make it difficult to innovate at a time when innovation is critical. Entire industries digitized business models overnight, and many organizations continue to adapt and retool around constantly evolving corporate cultures and business structures. Associations are trying to keep up with the changing expectations and needs of their members (and their staff) as the sector collectively faces recurring challenges to health, happiness, and productivity. Moving too slowly risks losing talent and members to more agile competitors. Yet, at just this moment when teams need to be trusting each other, taking ownership, and experimenting, leaders who are worried about their association's inability to find solid footing appear to be becoming more reactive and threat oriented. Their natural reaction, which is to exert more control, slows responsiveness and creates a situation where members can become disengaged and employees are burned out, not doing great work, and looking for the exits.[19]

The associations that choose to combine futures literacy with a systems approach to association management will be well-equipped for what the future holds, because their teams will be so well-attuned to the relationships and connections of the whole *and* the parts of their organization. Agility, resilience, and risk-taking will simply be a part of their association's culture, alongside innovation, creativity, and collaboration.

SYSTEMS THINKING IN LEADERSHIP

Decades of research in cognitive psychology show that the human mind struggles to understand nonlinear relationships. Our brain wants to make simple straight lines. In many situations, that kind of thinking serves us well: If you can store 50 books on a shelf, you can store 100 books if you add another shelf, and 150 books if you add a third. Similarly, if the price of coffee is $2, you can buy five coffees with $10, 10 coffees with $20, and 15 coffees with $30. In associations there are however many highly nonlinear relationships, and associations need to recognize when they're in play. This is true for generalists and specialists alike, because even experts who are aware of nonlinearity in their fields can fail to take it into account and default instead to relying only on their gut instinct. But when people do that, they often end up making poor decisions.[20]

17. UNESCO, 2024
18. Wooll, 2022
19. Ibid
20. de Lange et al, 2017

People who are systems thinkers have an ability to view a problem from different perspectives; to understand all the moving parts. They have the capacity to problem solve while thinking long term; are adaptive to change; responsive, flexible and willing to both recognize and push back on personal biases; and display a willingness to try new things in new ways and with people who may think a differently than they do.[21] *This* is the essence of leadership, and these characteristics are exactly what we expect to see in modern association leaders.

EMBEDDING THE SYSTEMS APPROACH WITHIN AN ASSOCIATION

By examining how the parts of the whole function together, leaders can uncover hidden relationships, anticipate unintended consequences and develop more sustainable solutions for their associations. It is important to remember that staff, volunteers, and members are all part of the system and that for the systems approach to work, everyone needs to understand and engage with that approach. Embedding systems thinking within an association's structures and culture is therefore necessary for the approach to work properly. Leadership teams must lean into a systems thinking mindset, but they must also ensure that the mindset filters throughout the association.[22]
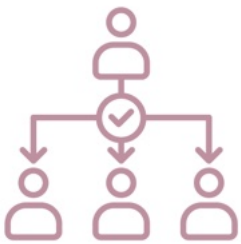
DELEGATE TASKS: Use systems thinking for delegating tasks to a team. Firstly, identify the key participants and communicate the goal, ensuring they have a full understanding of the "what" and the "why." Actively include and engage them in the design of the approach, i.e., the "how." Finally, discuss the impact and effects their actions will have on other teams, departments, members, volunteers, etc., and proactively communicate with them throughout the process to ensure a smooth rollout and feeding back to improve their future performance and/or decision-making.

CONSIDERING ALL PERSPECTIVES: Every one of us works in a system, whether it's by ourselves or with thousands of others. Systems thinking must consider both the vociferous advocates heard and those who are unheard. Each voice plays an important role in an association's system and so, it is a good habit for everyone to consider the impact that their decision(s) will have on members, staff, volunteers, suppliers, stakeholders, the association, members' profession, the membership sector, the physical environment, and future generations.

ADDRESSING DIVIDES: Systems thinking can have a significant impact in breaking down silos and fostering interconnectedness. Applying systems thinking principles to association management will cultivate internal collaboration and business strength, enhancing resilience and promoting empathy and unity.

COACHING LEADERSHIP TEAMS: It's useful to apply systems thinking when coaching both professional and volunteer leadership teams. These teams shape association direction and culture within complex systems, with far-reaching impacts. Often viewed as isolated entities, leadership teams (including boards and committees) can sometimes overlook their interconnectedness within the larger organizational system. By facilitating systemic team dialogues, coaches can foster collaboration and alignment.

NAVIGATING MULTI-TEAM COLLABORATIONS: Systems thinking should be a principle that underpins complex multi-team collaborations or projects, which can often involve multiple reporting lines, overlapping responsibilities, and perceived competing priorities. It is important to take a systemic view, recognizing the interconnectedness of various components and understanding how they influence each other.

21. Ryan, 2022
22. Forbes, 2024

FACILITATING CHANGE MANAGEMENT: When implementing changes, understanding the systemic implications is crucial. Systems thinking helps leaders anticipate ripple effects and unintended consequences, which facilitates smoother change management processes. This area is important because it is an ongoing process. Systems thinking encourages a mindset of continuous evaluation and improvement.
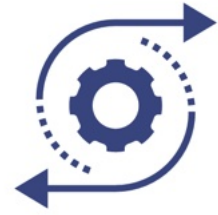
UNDERSTANDING THE BROADER IMPACT OF "SMALL TWEAKS": In an ever-changing world, small behind-the-scenes tweaks can impact the whole association. For example, addressing cybersecurity that relates to employees using personal devices for remote working might be safer, but the digital employee experience might also be compromised. Without a systems thinking approach, this could lead to increased turnover or reduced productivity.

STREAMLINING THE INTEGRATION OF TECHNOLOGY: The use of technology is largely understood as one of the most critical areas that would benefit from a systems approach; and yet, too often, associations identify technological solutions for their specific needs without considering how they will integrate with other organizational technologies. There is however increasing availability of member management systems (MMS) that prioritize the interconnectivity of data above all other functionalities; and a growing number of vendors are beginning to offer platforms that fully integrate the whole spectrum of technologies necessary for effective association management, i.e., CRM, event management, financial management, payments, website, member portal, learner management, committee management, communications, fundraising, and reporting.

MANAGING COMPLEXITIES: A systems approach can be effectively applied in managing complexity. Association leaders, more than ever, need deeper insights into their organization's complexities to develop effective strategies for long-term success. Systems thinking equips leaders to manage complexity by breaking any task or process into more manageable components so that they can then understand how the components interact.

THE ICEBERG MODEL

One approach that is particularly helpful for exploring association subsystems is the iceberg model. An iceberg has only 10% of its total mass above the water, while 90% is below. But that 90% is what the ocean currents act on, and what creates the iceberg's behavior at its tip. This is a common analogy understood in business (akin to the graceful swan whose frantic paddling we never see) and it is a comparison that is readily understood amongst linear and systems thinkers alike.
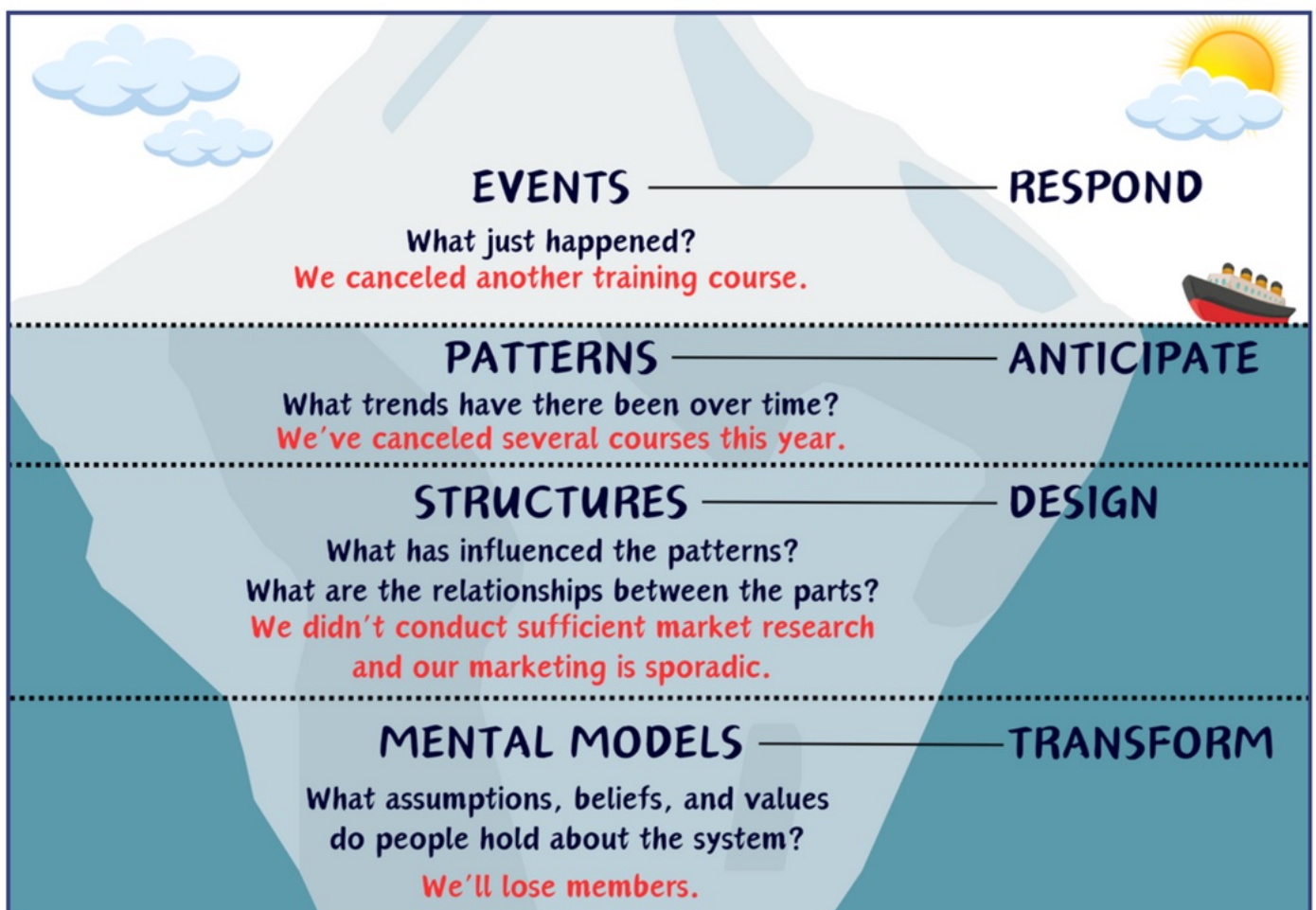
LEVELS OF THINKING

The Event Level: The event level is the level at which we typically perceive the world, in this instance, realizing we have insufficient registrations and have to cancel one of our training courses. While problems observed at the event level can often be addressed with a simple readjustment, the iceberg model pushes us not to assume that every issue can be solved by simply treating the symptom or adjusting at the event level.

The Pattern Level: If we look just below the event level, we often notice patterns. Similar events have been taking place over time - we've had to cancel or rearrange several training courses this year and doing so at relatively short notice. Observing patterns allows us to forecast and forestall events.

The Structure Level: Below the pattern level lies the structure level. When we ask, "What is causing the pattern we're observing?" the answer is usually some kind of structure. A lack of market research, failing to monitor the competition, insufficient marketing, and an inadequate pricing strategy could all be structures at play in us needing to cancel the training course. Structures can include the following:

- Physical things: like transport, venues, traffic lights, and terrain.
- Organizations: like associations, corporations, governments, and schools.
- Policies: like laws, regulations, and tax structures.
- Ritual: habitual behaviors so ingrained that they are not conscious.
- Financial: like costs, inflation, margins.

The Mental Model Level: Mental models are the attitudes, beliefs, morals, expectations, and values that allow structures to continue functioning as they are. These are the beliefs that we often learn subconsciously from our society or colleagues and are likely unaware of. Mental models that lead us to canceling a training course could include: a belief that members will automatically perceive value in our proposition; a concern that unless we deliver a certain quota of courses, we'll miss our financial targets; or if we fail to deliver regular training courses, members will desert us and seek alternative an alternative membership body.

EVENTS ———————— RESPOND
What just happened?
We canceled another training course.

PATTERNS ———————— ANTICIPATE
What trends have there been over time?
We've canceled several courses this year.

STRUCTURES ———————— DESIGN
What has influenced the patterns?
What are the relationships between the parts?
We didn't conduct sufficient market research
and our marketing is sporadic.

MENTAL MODELS ———————— TRANSFORM
What assumptions, beliefs, and values
do people hold about the system?
We'll lose members.

The model can be applied to any event that is considered urgent, important, or interesting, and can include any decision that may impact one or more of the association's subsystems, such as programming for the annual meeting, a review of membership dues, creation of a new professional qualification, commissioning of magazine articles, investment in a new MMS, and of course, development of a new strategic plan. When using the model, reflect on the following:

1. Does the model help to broaden perspectives within the association? If so, how might these new perspectives be helpful?
2. Consider the concept of entry, or "leverage" points. These are points at which to intervene in a system that could lead to systemic transformation. Are there entry points at which one might be inspired to intervene?
3. What issues that have frustrated the association might be interesting to analyze using this model?

CALL TO ACTION

Traditional thinking has tended to encourage a focus on the separate elements of a whole, rather than the interconnections between them and what those interconnections produce. It often assumes there is a single cause of and/or solution to a problem; and there is an emphasis on outcomes and quantitative measurements. This can be a dogmatic and reductionist approach, which sometimes leads to criticism and blame, conflict and/or competition. In contrast, whilst the systems thinking methodology isn't necessarily formulaic, it does offer a holistic approach to problem-solving. It's a way of looking at how systems work, what that system's perspective is, and how to better improve system behaviors. Without systems thinking, an association might set its goals too narrowly and pursue them. Sometimes, those pursuits result in strategies that are detrimental to one or more of the association's subsystems or the wider association's strategic objectives. Associations that want to be more than the sum of their parts need leaders and managers who can think systemically and with enough transparency that everyone can understand the system.

Contemporary associations operate in ecosystems full of interconnectivity and constant feedback loops. Mapping such complex systems helps association leaders and managers to navigate into adaptive strategies. The ultimate gain is the ability of associations to be responsive to the changes in their ecosystems and to be prepared to fine-tune and quickly adapt parts of their organization as required. Within this context, the systems approach provides clear benefits to associations: It helps in framing complex problems, which can often be misdiagnosed using traditional linear thinking; it presents alternative options for improvement with respect to the association's internal and external connections; it provides a significant advantage in increasing an association's capacity for change and, as a consequence, to fulfill the vision of the association. Although it requires some talent and a deeper understanding of complexity and ambiguity, systems thinking can be successfully introduced and utilized to strengthen associations;[23] and systems thinking and a systems approach to association management can become the foundation for associations' long-term success.

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23. Westover, 2021

GLOSSARY OF TERMS

Included in the white paper but also used more widely in systems thinking.

Adaptive Strategic Management	Goes beyond the traditional strategic planning approach and involves continuously monitoring the external environment, identifying emerging trends, and swiftly adjusting organizational strategies in response. This approach allows associations to be agile and responsive, mitigating risks, and capitalizing on new opportunities as they arise. The key components of adaptive strategy are data-driven decision-making, agile planning, cross-functional collaboration, and an investment in technology.
Causality	Understanding feedback loops is about gaining perspective of causality: how one thing results in another thing in a dynamic and constantly evolving system (all systems are dynamic and constantly changing in some way; that is the essence of life). Cause and effect are common concepts in many professions and life in general; and causality as a concept in systems thinking is really about being able to decipher the way things influence each other in a system. Understanding causality leads to a deeper perspective on agency, feedback loops, connections and relationships, which are all fundamental parts of systems mapping.
Circularity	Refers to how each component of a system contributes to and is influenced by the others, resulting in a continuous feedback loop. Patterns emerge from these interactions, and identifying patterns can help in understanding and predicting consumer [member] behavior, as well as the potential outcomes of resource allocation and investment decisions.
Closed System	One that has almost no interactions with its external environment. These are much rarer than open systems, as it is very difficult for any organization to operate independently of its environment. Its various subsystems would still be interdependent and interact constantly, but the overall system is independent and self-sustaining. It doesn't rely on its external environment to function. This can cause the system to encounter limitations, such as input constraints. A closed system would therefore be autarky, where almost no exchange occurs between it and external systems.
Critical thinking	The art of making clear, reasoned judgements based on interpreting, understanding, applying and synthesizing evidence gathered from observation, reading, and experimentation.
Differentiation	Specialized units perform specialized functions.
Emergence	From a systems perspective, larger things emerge from smaller parts and 'emergence' is the outcome of those things coming together. Emergence is the outcome of the synergies of the parts; it is about non-linearity and self-organization, and the term is used to describe the outcome of things interacting together. Conceptually, people can find emergence a bit tricky to get their head around, but when it is understood, the brain starts to form emergent outcomes from the disparate and often odd things we encounter in the world.

Entropy	The amount of disorder or randomness present in any system.
Equifinality	Alternative ways of attaining the same objectives (convergence).
Expressive Strategic Management	Prioritizes taking a proactive approach to adapting to changes in an organization's internal and external environments while remaining committed to upholding and communicating the mission and vision behind the larger organization.
Feedback loops	Since everything is interconnected, there are constant feedback loops between elements of a system. We can observe, understand, and intervene in feedback loops once we understand their type and dynamics. The two main types of feedback loops are 'reinforcing' and 'balancing': a reinforcing feedback loop is not usually a good thing because elements of a system reinforce more of the same, such as population growth or algae growing exponentially in a pond. A balancing feedback loop, however, is where elements within the system balance things out; but if you take out too much of one element from an ecosystem, an explosion of another will occur, which then creates a reinforcing feedback loop.
Goal seeking	Systemic interaction must result in some goal or final state.
Hierarchy	Complex wholes are made up of smaller subsystems.
Holism	Emergent properties that are not possible to detect by analysis should be possible to define by a holistic approach.
Inputs	In a closed system inputs are determined once and constant; in an open system additional inputs are admitted from the environment.
Interconnectivity	The fundamental principle of systems thinking is that everything is interconnected, with all distinct components of an association combining as its subsystems to ensure the system's collective success.
Interpretive Strategic Management	By using an organization's mission and values as a framework for decision-making, interpretive strategic management helps ensure that new initiatives align with the overall goals of the organization. Additionally, it fosters more innovative and experimental environments by viewing decision-making as an ongoing process rather than a rigid, formulaic responsibility.
Interdependence	Of objects and their attributes - independent elements can never constitute a system.

Linear Strategic Management	Relies on building decision-making processes based on logic and rationality, allowing organizations to react effectively to unexpected changes and disruptions.
Multifinality	Attaining alternative objectives from the same inputs (divergence)
Open System	One that interacts with its environment and is the most common type because you can describe almost anything as a system. For example, a business is an organizational system, but so too is society. If you're observing a business, you'd consider it as the system and its individual departments as subsystems. Alternatively, you may be observing a country, which is an overall system. Here, organizations like businesses and others might be the various subsystems within it. Since most organizations, associations or otherwise, rely upon their external environments to function to some extent, the vast majority are therefore open systems.
Regulation	A method of feedback is necessary for a system to operate predictably.
Silo effect	A lack of communication and/or common goals between an organization's teams. In siloed organizations, teams do not solicit ideas from each other, even if they depend on each other to accomplish their goals. This often results in duplication of effort, working at cross-purposes, and/or reduced productivity.
Synthesis	In general, synthesis refers to the combining of two or more things to create something new. When it comes to systems thinking, the goal is synthesis, as opposed to analysis, which is the dissection of complexity into manageable components. Analysis fits into the mechanical and reductionist worldview, where the world is broken down into parts; but all systems are dynamic and often complex; thus, we need a more holistic approach to understanding phenomena. Synthesis is about understanding the whole and the parts at the same time, along with their relationships and the connections that make up the dynamics of the whole. Essentially, synthesis is the ability to see interconnectivity.
Systems mapping	Systems mapping is one of the key tools of the systems thinker. There are many ways to map, from analog cluster mapping to complex digital feedback analysis. However, the fundamental principles and practices of systems mapping are universal: Identify and map the elements of 'things' within a system to understand how they interconnect, relate and act in a complex system, and from here, unique insights and discoveries can be used to develop interventions, shifts, or policy decisions that will dramatically change the system in the most effective way.
Transformation	The process by which goals are obtained.

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