NEBRASKA RURAL HEALTH ASSOCIATION

NERHA

Supplemental Board of Directors Information

The Role of the Rural Health Association Board

(This information is from the National Rural Health Association's State Association Council for use by state rural health associations)

Many boards are dedicated and skilled in their work, and provide clear and consistent leadership to their association. Others, however, are not so effective. Virtually all boards raise concerns at some time that their job is not clear and their work is at times difficult and confusing.

As boards have diversified, the structure and responsibilities and the work they have assumed to accomplish together has changed. Boards now perform a wide range of tasks. However, there are some roles that all boards must assume.

The board's role in any non-profit associations can be broken down into two categories:

1. The **mandatory role** based on the minimum legal requirements for all board members and;
2. The **chosen role** boards elect to perform because of the board model they elected.

The board's role and responsibilities based on the three different activities of the organization:

1. **Governance**: The policies developed by the board that give overall direction to the agency.
2. **Management**: The board takes actions and makes decisions to ensure there are sufficient and appropriate human and financial resources for the organization to accomplish its work.
3. **Operations**: These are the activities, services or programs of the organization. The board has no mandatory role in this area. Many boards see this work as the responsibility of the board and staff. However, dependent on the Board Model, used some boards choose to actively participate in the operations due to philosophy or limited resources.

When determining the role of the board, it is important to address two key facets:

1. To identify the Areas of Board Responsibility as a collective of individuals
2. To identify the General Responsibilities of Individual Board Members

Importance of Board Governance

With shrinking public money, greater demand for services, exposure to liability, stronger accountability and questioning of the nature of charitable work, the non-profit associations must enhance their capacity to increase the credibility and effectiveness. Boards of Directors have to be accountable to their membership, funders and stakeholders. As well, they need to learn how to work effectively and efficiently. Boards of non-profit associations whether new, established or in transition, now have a range of choices about how to work together to fulfill their role.

Boards must make a decision about its structure based on three basics questions:

1. Which decisions does the board want to make and which do they want to delegate?
2. How much involvement does the board want to have in the operations of the organization?
3. How will the reporting relationship between the board and the staff be defined?

Based on the response of those questions, four possible board models are suggested:

1. **Policy Board** - This traditional model is familiar to many organizations. A partnership is developed between the board President and the Executive Director in order to lead and manage the organization. A series of committees do the work of the board and these are often supported by senior staff.

   Responsibilities:

   - Establish and implement the organization's purpose.
   - Set the rate of progress the organization will undertake in achieving its mission.
   - Provide continuity for the governance and management of the organization's affairs.
   - Confirm the organization's identity within the community. Examine how the Policy Board Model compares with other Board Models by visiting the

2. **Policy Governance Board** - This model of board organization has been popularized by John Carver in *Boards that Make a Difference.* It provides a structure and method of proscribing limits on the Chief Executive Offers responsibilities. Emphasis is placed on the main purpose of the board - policy development. The board works as a whole and speaks with one voice.

   Responsibilities:

   - Determine ends to be achieved
   - Determine means to the ends
   - Determine Board/Executive relationships
   - Determine board process

3. **Working or Administrative Board** - A working board has some responsibilities for the operations of the organization. In addition to providing policy and general direction, the board members may help in practical ways such as organizing events and drafting documents.

   Responsibilities:

   - Planning
   - Finance
   - Human Resources
   - Organization Operations
   - Community Relations

4. **Collective -** A collective is a group of like-minded people working towards a specific goal. The individuals within the collective have a responsibility to define and support the basic philosophy of working as a collective. Responsibilities:

   - Planning
   - Finance
   - Human Resources
   - Organization Operations
   - Community Relations

Each organization needs to take the time to decide on a board structure that best meets their needs.

Systems alone do not ensure a good board. The key elements on the human side of board effectiveness are:

- power
- commitment
- competence
- diversity
- collective decision-making

Whatever decision-making style a board chooses, it should:

A. draw on the expertise of all board members;
B. make clear, well-thought out decisions;
C. formally record decisions for future reference, and for legal purposes;
D. communicate the decisions to the appropriate parties.

Following are some of the basic steps in decision-making.

1. **Recognize and define the problem.**

   Everyone must understand the problem. This sometimes takes time to articulate and define. Background preparation is especially helpful.

2. **Examine the problem.**

   Most groups make better decisions if they have choices in front them, rather than being forced to select or reject one idea. Ideas and options can be generated beforehand, by staff or a committee, or can be developed during a board meeting. The three most common ways during the meeting are brainstorming, buzz groups and discussion groups. Once the alternatives have been identified, the board needs to consider the implications and consequences of each. For each option ask - What are the likely consequences? How will this affect members and clients? How will it affect the agency's other programs and services?

3. **Make the decision**

   There are a number of different styles of decision-making.

   Avoiding or abdicating a decision

   Although this is not usually recognized as a decision-making style, in fact the board may delegate many of its responsibilities this way, and not always deliberately. Failure to reach agreement can lead to the board passing the problem to the Executive Director or a committee.

   Decision by majority rule - The plus and minuses of voting

   Following a thorough discussion of the problem and options, a formal motion is presented. A vote is taken on the motion. How the motion is framed shapes the scope of the discussion and can narrow the options. Issues can be approached in several different ways. A motion reduces these options to one, and limits the response to "yes" or "no". This may eliminate many important alternatives. The process of framing the question and the options is at least as important as the vote itself. Board members should not propose motions too early in the discussion before reviewing all the alternatives. For example, in addressing a shortfall in funds, a board member might make a motion immediately about a specific idea. "I move we have a fundraising bazaar." Discussion then focuses on whether a bazaar is a good idea. This effectively removes other options, or indeed other ways of looking at the problem, such as deciding what portion of the shortfall should come from fundraising, what portion from cuts in expenditures, and what portion from grants or loans or other actions.

Boards may use **Robert's Rules of Order**, or some other form of parliamentary procedure. However, because these rules are somewhat complicated, they can lead the board to focus on procedure rather than content. Adhering to a set of rules, such as Robert's, is appropriate for large meetings where decisions with legal implications are being made, e.g. appointing the auditor at the annual meeting.

Consensus Building

This is less formal than voting procedures and allows a decision to encompass the views of all board members.

A consensus process is designed to generate a wider range of ideas and options. The issue is initially framed as a question or problem with supporting information. Discussion centers around finding the best approach to the issue. In the course of discussion, the question may be reframed several times, and various options may be developed, altered and combined.

4. **Implement the decision.**

   Plans for implementation need to consider what resources are required as well as who will need to do what and by when.

5. **Evaluate the decision.**

   Specifying what worked well and what could be done even better another time will improve the capacity of the organization to make decisions and the quality of the decisions made.

As well, the importance of being open, transparent of activities to the public at large, communications between the organization and its members, funders and stakeholders are keys to successful stewardship.

Other areas of importance to consider are:

- Policy development and the establishment of an organization's mission, vision, and direction
- Fiscal responsibility to ensure financial health and organization
- Appropriate human resources and performance management
- Evaluation and control
- Succession planning
- Direct Organizational Operations
- Effective Community Relations

The Components of Board Governance

Many boards are dedicated and skilled in their work and provide clear and consistent leadership to their organization. Others, however, are not effective. Virtually all boards raise concerns at some time that their job is not clear, and their work is difficult and confusing.

In addition, with diminishing resources, Boards are facing the challenge of restructuring and working towards self-sustainability.

Board members are beginning to recognize the need to be efficient and effective in their work. Paramount in ensuring an effective and efficient board are the following criteria:

- Understanding of one's role and responsibilities
- Proper management of meetings
- Strong team building

To ensure that the internal culture of the board is healthy and productive an effective board must ensure its own renewal and development. The use of effective committees can assist boards in supporting organizational programs, services, or policies.

The Steps of Effective Board Operations

A basic responsibility of the board is to ensure its own renewal and development. The board development cycle illustrated below is one way of describing the key steps in the process.

Develop a Board Profile - Develop a board profile of the skills, qualities and knowledge that the board will need in order to address the challenges facing the organization in the next few years. The board profile is a way of translating the organization's strategic goals and priorities into a description of the kinds of people who are needed for the board.

Please note that that a board profile is much easier to do if the organization has formally agreed on a vision and a strategic plan. It is recommended that a board profile be reviewed annually. In order to develop a board profile, it is useful to prepare an assessment of current board members. To do this, a committee may want to:

- Send a brief questionnaire to each board member to identify their skills and strengths
- Refer to previous board evaluations (if available)

Recruit and Select New Board Members - The nominating committee must find candidates with the skills, qualities and knowledge to fit the board's needs. The nominating committee will then screen and select the members. Succession planning is important in the process to identify future leaders from among board members and provide opportunities to learn and demonstrate leadership skills through chairing a committee or short-term task groups or taking on a specific task or representing the organization at community events.

Election - In many organizations, the nominating committee prepares a slate of candidates which is voted on at the Annual General Meeting. In other organizations, the nominating process is open-ended. Any member can nominate a candidate for the board. Be clear as to your process for election, refer to your By-laws as to protocol.

Orientation - Orientation of the entire board shortly after the election is essential. The purpose of the orientation is:

- To provide important information about the organization and about the board's responsibilities.
- To build a working relationship among board members that promotes ongoing support and comes to an agreement on how they will carry out their work.

Ongoing support & Recognition - Board members need continuous support during their term to help them do their work effectively. This may include:

- A "buddy system" for new board members with a member who has been on the board for some time
- Regular feedback about their work
- Occasional reminder about roles and responsibilities
- A clear indication about who a board member should approach for information when they have questions.

Training and Development - Training and development opportunities are important to the success of a board. A development session can happen in a number of ways:

- a planned workshop for the board to attend
- a guest speaker or presentation by one of the board members or
- staff participation by individual board members in seminars and conferences held by other organizations

Evaluation - Board evaluation can happen at several levels.

- annually to determine the board's effectiveness throughout the year
- at the end of each board meeting
- through self evaluation annually

Board committees should also be evaluated annually

Legal Responsibilities

Volunteer directors of not-for-profit organizations have an obligation to three segments of society:

The corporation and its members - With regards to fiduciary duties, board members are expected to:

- act in good faith and in the best interest of the organization
- never participate in discussions or decision-making about a matter that may benefit you or someone close to you
- keep all information confidential

As well, board members have a duty to use the level of skill that may reasonably be expected of someone with their experience and expertise. Before making decisions board members are expected:

- to consider all information available to them,
- inquire into the affairs of the corporation and
- attend meetings regularly.

In effect, the courts have said that it is no longer possible to be a passive director. Lack of knowledge or passive participation will not absolve the director of legal responsibility. To discharge this obligation to the organization, board members should familiarize themselves with or ensure that they have reliable advice as to the organizations' obligations in the areas of:

- taxation
- employment
- Human Resources Management
- Services for Business
- Employment Legislation Information
- any specific legislation related to the work they do and the clients they serve.

Board members should understand the need for appropriate property and liability insurance to protect the organization from sudden financial calamity.

Board Responsibilities and Planning

The board is responsible in five key areas:

1. To establish the organization's mission, vision, and direction
    - vision and values
    - mission and philosophy
    - strategic planning
    - programs and services
    - evaluation

2. To ensure the financial health of the organization
    - responsible for ensuring there are adequate financial resources for the work of the organization
3. To ensure the organization has sufficient and appropriate human resources
    - responsible for the working conditions in the organization
    - responsible for hiring, giving direction to and evaluating the senior staff person
    - responsible for ensuring the capability, suitability and vitality of its membership
    - responsible for ensuring the existence of a Nominating Committee
4. To direct organizational operations
    - responsible for ensuring that the organization and its directors are in compliance with its legal requirements
    - responsible for ensuring that the board works effectively
    - oversees organizational structure and agency administration
5. To ensure effective community relations
    - respond to changing needs/pressures in the community
    - find new ways to meet needs
    - use marketing and public relations

Responsibilities of Individual Board Members

Individual Board Members are expected to:

- Understand the organization's mission and mandate, be aware of issues and keep up to date on trends in the community that might affect these issues
- Ensure that the organization's legal affairs are in order, know the board's legal obligations and make sure they are upheld
- To understand and, if necessary, query all financial and budget matters
- Keep board discussions confidential

Bring your own training, skills and experience to all board decisions. A useful starting point in understanding your responsibilities is to determine whether your organization has developed job descriptions for its board members. Developing Board Member Job Descriptions is a useful and valid investment that:

- clarifies the various roles and responsibilities of board members
- provides the organization with a tool that facilitates an orientation process for new board members

Implementing effective meeting procedures is the responsibility of various individuals, most often the Chair. However, it is the board's responsibility to establish them.

Regular Meetings

Volunteers have many demands on their time. If an organization persists in a pattern of unproductive, listless, unclear or dreary meetings, it will soon begin to lose its volunteers. It is important that meetings be as effective as possible and at the same time acknowledge the social needs that participants bring. Humor, time for informal discussion and opportunities to get to know one another will ensure that meetings are fun as well as efficient and effective. Successful, effective meeting results are determined not only by what happens during a meeting but by events before and after the meeting as well.

Team Building

Every board must be able to discharge its collective responsibilities. The more cohesive the board is, the easier the job can become. Team-building concepts and skills are integral to good board performance.

Different approaches to team-building are based on the skills, practices, values and assumptions people bring to the table. These will clearly vary significantly from board to board, and, to some degree, between members of the same board. Team-building results in people working together in a systematic, unifying way. Team work is needed on the whole board and on committees within the board.

Qualities of an Effective Team

There is no magic recipe for team-building. There are, though, certain recurring themes. Any board or group should adopt the team qualities most important and appropriate for them.

These qualities are value-based so individual board members will bring different cultural and personal understandings to them.

The five qualities are as follows:

1. Participation
2. Openness
3. Cohesiveness
4. Ability to Change
5. Shared Leadership

Establish an Organizational Vision and Mission

A non-profit organization operates to achieve their mission or reason for being (why the organization exists) as defined by the board of directors. The organizations activities should be consistent with its stated purpose and effectively and efficiently work towards achieving that mission and be committed to continual quality improvement. Based on the value of quality, openness, integrity, responsibility and accountability, non-profit board members, volunteers and employees should act in the best interest of achieving the organization's mission at all times.

Mission

Before writing or re-writing a values and mission statement, the organization should evaluate whether the mission needs to be modified to reflect current community needs;

- whether the organization's current programs should be revised or discontinued or;
- whether new services need to be developed in light of the existing or newly defined mission.

The organization should have defined procedures in place for evaluating both qualitatively and quantitatively its goals, objectives and outcomes in relation to their mission. These procedures should address the efficiency and cost effectiveness of reaching their goals, objectives and outcomes.

Values

A non-profit organization should act with integrity, openness, respect and honesty in all relationships, dealings and transactions. They should strive to earn and convey trust through these values.

The non-profit organization should keep faith with the public trust through efficient cost effectiveness and stewardship of resources.

Commitment to Inclusivity and Diversity

A non-profit organization should respect all people's race, religion, ethnicity, gender, age, socioeconomic status, sexual orientation and ability and should not allow differences to affect a person's opportunities.

Board, staff, and volunteers:

- Should reflect the diversity of the organization and the broader community.
- Should conduct its work in facilities that are accessible to persons of all ability levels.
- Should act in ways that further opportunities among individuals and the community.
- Should act in ways to promote a sustainable environment.

What's the Board's Role in Strategic Planning?

The board's role related to the mission, vision and values of the organization is three-fold. First, it has the responsibility for making sure that the organization has a mission, a vision and set of values. This responsibility is pretty significant as it is much more than simply making sure that something has been put on paper. Greatness is not in being able to show that the words were written. Greatness is in the message that is conveyed and the common understanding that everyone holds. It is found in the outcomes that are created.

The second responsibility is to inspire people to believe. This is where leadership's (board and management) ability to walk the talk of the mission, vision and values along with leadership can make or break just how powerful these messages can be. It lays the groundwork for the staff's willingness to believe in and follow them as leaders. Remember, only very brave or very foolish employees will try to move their organizations to a better place if leadership is not out in front leading the way.

The third responsibility is to make sure that people understand their contribution. This is where the skill of sincere "future talk" is one of a leader's greatest assets. The board's role is to lead, In order to lead; the Board needs to inspire people to believe because real leadership only exists when people choose to follow.

Mission, Vision and Values

The mission, vision and values of an organization can be very powerful tools if they are developed with the same passion that they are intended to stir in our people. In turn, they can also be just another perfunctory activity that we do because we think we have to, What they do for our organizations is totally dependent on the attitude we have about them and how we treat them.

The mission, vision and values can be extremely helpful in defining who we are, why we exist, what we want to be, and how we will get there. They help our people focus on the target that defines the organization's future and understand the contribution that they make in the delivery of high quality patient care and creating an organization that holds a special place in the hearts and minds of our communities.

The most moving reason for people to get out of bed in the morning, come into work and deal with an industry as challenging as health care is because their efforts are tied to making a difference. At the end of the day, they know that their patients are better off and their community has access to high quality care that might be much more difficult to attain if the organization did not exist.

The mission, vision and values are each something much greater than a mere group of words that create a statement. The power is not in the words. It is in the message that is conveyed and the feeling the message elicits in the people who are responsible for bringing it to life. Like so many potentially helpful tools that have been introduced into health care, the mission, vision and values have unfortunately been viewed by many as just one more thing that has to be done to please some outside entity. Their real purpose and potential has been sadly overlooked.

It is very easy to pick up literature related to health care and read about the tremendous morale problem that the industry is experiencing. So many of our people express frustration with feelings that they work hard every day and don't ever feel that they make a difference. If we want our people to care, they need to know that they contribute to meeting the mission and creating the vision.

The “Mission” of an Organization

Missions can carry very powerful messages but too often they are just words inside many organizations. A perfect example of the mission statement that is just words is the one that people have to look up when asked what it is or can efficiently recite but not explain.

The real value of a mission does not reside in the words that are printed on the page. There is a difference between a mission and a mission statement. The mission conveys the passion behind the organization’s existence. The mission statement is a tool to convey it to stakeholders and outside parties.

The power of the mission is found in the outcome it elicits when leadership agrees on what it means in terms of day-to-day operations and future planning and the ownership for making it a reality is successfully transferred to the front-line workers. The value of the mission is measured in how these front-line people translate it into actions and understand the power of their actions in making a difference.

The mission communicates the purpose for the organization’s existence. For example, the mission of the American Red Cross is “To care for those in need.” A mission statement is an enduring statement of purpose for an organization that defines why it exists and reflects its values and priorities. It captures the unique reason for being and energizes stakeholders to want to be part of making it a reality.

The mission does not have to be long or complicated. It simply needs to communicate and inspire, If used properly, it becomes pivotal in making “do we or don’t we” decisions when faced with conflict over whether something is in the best interest of the organization or patient care. It creates the foundation on which leadership builds the vision, values, and strategic plan.

Missions tend to withstand the test of time. They do not change significantly unless the organization changes significantly. If done properly, they tend to be one of the few constants in our lives.

The “Values” of an Organization

The value statements of an organization commonly consist 4 of 8-12 statements that define the values that the organization hold to be important. They commonly speak to issues of respect, caring, courtesy and quality. They are intended to define those values that drive the culture of the organization and create the foundation for how people act and behave inside the organization

They define those behaviors that are closely tied to making the mission a reality. The values of the organization are closely tied to the policies. Policies translate values into Position statement for the organization. While values define desired behaviors, policies translate those behaviors into do and don’t statements of what the behaviors look like in day-to-day activities.

Procedures then translate policies into day-to-day actions. They outline the specific steps that people will take to bring the values and policies to life. For example, a healthcare organization may have a value that speaks to respect for all people. One of the policies that the organization would develop to operationalize this value would address nondiscrimination in hiring and employee management

practices. The organization would then have a number of procedures to describe how this policy would be acted out in day-to-day business.

In the end, the mission drives the values which then drive the policies which in turn drive the procedures. They all come together to support the organization in reaching for its vision and mission.

The board's role is to help in defining the values and policies while management sets the procedures. Board oversight involves gaining a comfort level that the organization successfully lives the mission, values and policies in its day-to-day activities.

The "Vision" of an Organization

The vision describes how you expect the organization to look -how you expect it to be better - at some point in its future. The vision of an organization is more comprehensive than the mission statement and it describes what the organization would look like at some point in the future if it were to operationalize the mission and achieve its goals of community service. It paints a picture of what the organization aspires to be and what that future would look like for its key stakeholders. It helps people in the organization to visualize what they are working to create.

The vision is commonly developed as part of the strategic planning process and is a collaborative activity between the board and senior leadership. Physician input can be extremely beneficial in this activity as this group of professionals has such a profound impact on the organization's success.

The vision serves three important roles in a healthcare organization. First, it defines the target that the organization is reaching for, It creates focus for the workforce and let's everyone know when they have created success. Secondly, it helps to promote an effective strategic planning process. The vision defines what the strategic plan is working to create. Finally, it creates the foundation for "future-talk". Great leaders tend to be very good at future talk because they recognize the importance of having the workforce understand that their actions not only impact today but they set the stage for tomorrow. The vision is often that future that the leader ties those actions to.

The Need for a New Type of Strategic Planning

Traditional strategic planning techniques can be the equivalent of no strategic planning at all in today's healthcare environment. At best, they may help the organization make some progress but it is generally
not enough to make the kind of difference that today's market demands. It is leadership's responsibility to recognize these needs and lead the organization in the right direction.

In the past, strategic planning activities focused more on maintaining and feeding what already existed. This approach worked in a time when technology was more stable and the environment did not change as quickly as it does today. Organizations use to be able to write a strategic plan and know that it would be good for 3-5 years.

Organizations that appropriately focus on the needs of today's fast paced environment have strategic planning activities that meet the following criteria:

- The organization's vision is established for a period of time 3-5 years out from today (the time frame is dependent on how dynamic the environment is).
- The strategic plan consists of 4-6 critical goals that will move the organization towards its vision over the next 12—18 months. If it takes more than 12-18 months to make a strategic change happen, there is a good chance it has lost is strategic edge.
- Strategic goals are broken down into incremental thy-to-thy activities through a strategic management plan which looks at how to weave those activities into the day-to-day life of the workforce.
- The success in achieving the goals is assessed by senior leadership at least monthly and by the board at least quarterly to assure timely execution and intervention. If modifications are necessary, they are made in a timely manner.
- The strategic plan is reviewed at least annually for necessary additions and modifications. As strategic goals are achieved new goals are added. The new goals allow the organization to take the "next steps" in working towards its vision of the future.
- Once the vision is achieved, a new vision is set and the process of goal setting and implementation continues.

As one can see from these steps, effective strategic planning in today's environment is a continuous process that remains responsive to the changing healthcare market. It allows an organization to change on a dime if major changes in the market might impact it. It keeps an organization continuously moving to a better future in a way that keeps the organization out in front of market changes instead of running to catch up.

This era of strategic planning requires boards to be comfortable in their roles as the lead change-agents in their organizations. They need to be comfortable with the risk of making decisions and choices that have some level of residual uncertainty. They need to be the first people to change. It is impossible to be viewed as leaders if the message to the workforce is that they must change in spite of leadership or that they must bear the risk of change by themselves.

STATE RURAL HEALTH ASSOCIATIONS BEST PRACTICES

(This information is from the National Rural Health Association's State Association Council for use by state rural health associations)

Building and Maintaining Membership

As grassroots membership associations, SRHAs need a steady pool of members to meet their goal of improving rural health. So if your SRHA is developing a membership program or looking for ways to improve an existing one, this chapter will show you how.

Six Keys to Success

The following fundamentals are essential to the success of any membership recruitment and retention effort. Keep them in mind as you develop and implement your plan.

1. Make a Continuing Commitment to Membership Development
Efforts to increase membership should extend beyond the SRHA's formative years. Improving services, benefits, recruitment, and retention should be a concern for SRHAs at every stage of their development, and your Board of Directors should play an important role in the Membership Campaign.

2. Identify a Cadre of People Committed to Conducting a Membership Campaign
The SRHA's membership committee, the governing body, or other group of designees should spearhead membership-building activities and develop each leader in the association as a roving ambassador. In doing so, the SRHA will maximize its results and extend its research.

3. Base Your Efforts on a Well-constructed Plan
Membership development efforts are less likely to be successful if you simply make up steps as you go along. Instead, analyze your market, and use what you learn to develop a detailed marketing plan.

4. Engage in Appropriate Implementation and Follow Up
When putting your plan into action, make one person responsible for implementing and following up on each step. Ensure that these assignments are challenging, yet manageable enough so people do not feel overwhelmed and can handle them within a specified time frame.

5. Acknowledge Successes

As each membership goal is reached, recognize the efforts of those who helped along the way. Also, make an effort to learn from your experiences by evaluating whether each effort was successful and why.

6. The Psychology of Membership Development

Understanding the factors that affect people's decisions to join or renew their memberships in associations will help ensure that your membership development plan is on target.

In general, people join associations because they perceive that membership will meet at least some of their personal and/or professional needs. They also tend to affiliate with associations that closely match their personal values, goals and interests. Specific factors that motivate people's membership decision include the following:

Tangible Benefits

Many people are attracted to associations because of specific services, products and programs they offer; such as, annual conferences, regional educational offerings, newsletters, professional updates, membership directories, and advocacy efforts.

Intangible Benefits

Some may see membership as providing them with a sense of belonging, the opportunity to be affiliated with a worthwhile cause, or the chance to receive greater recognition by their peers.

The Cause

Some people join associations to support a cause and view their membership as an endorsement of the association's activities or programs. Still others may feel indebted to the health professions or their communities and join with the purpose of "giving something back." In both cases, they expect to have a greater impact by taking part in a larger, more organized effort. Make sure the cause is communicated clearly and effectively.

Access to Information

Some people join an association to acquire up-to-date, relevant information. They are particularly attracted to an association that can serve as a primary information resource and provide members with information that they may not be able to obtain readily from other sources, if at all.

Image Building

People often perceive that an association's good reputation and positive public image will strengthen their own. Those who join for this reason generally look for associations that are strong and have a proven track record.

Costs

In this era of limited resources, people are more likely to consider the amount they are spending on dues when deciding whether to join an association. Potential SRHA members who also are being recruited by other organizations will be more likely to join if they consider the SRHA's dues to be affordable and reasonable.

Staff Responsiveness

Through providing information, discussing issues and answering requests, association staff are sometimes as visible to the public as association leadership.

Prospective members may base their impressions of the association on their contacts with staff. Some may even join because of relationships they have built with staff members or because they recognize that the association is in capable hands. Professional or

Business Gain

People also tend to join associations if they perceive that membership will benefit their career or organization. Career minded individuals seek knowledge and skills to do their jobs better, as well as the opportunity to network with their peers. They also may seek benefits for their companies, such as identifying new customers, or simply becoming better known.

Social Contact

Some people join associations for the opportunity to relate to others who understand their issues and have similar concerns. They also may consider membership a way to keep in touch with or make new friends.

Develop a Membership Profile

Existing SRHAs should take the following steps to assess the association's current membership needs.

1. Review Current Membership. Consider the type, mix and number of members in each membership category. Also consider whether the SRHA has achieved its desired level of diversity; as well as, whether all regions of the state and rural areas of all sizes are being represented.

2. Examine Recruitment Rates. Graph the number of new members who have joined the association during each month or quarter of the past year. The graph will help you to pinpoint the peaks and valleys of your recruitment efforts and may help you determine when new members are most apt to join and when overall membership numbers tend to be the lowest. You also might study these numbers in conjunction with the dates of significant events, conferences, and membership campaigns to see which recruitment efforts have been the most successful.

3. Examine Retention Rates. The percentage of SRHA members who renew their membership should be calculated and assessed at least once per year, perhaps at the time when annual

dues payments are expected. Ask yourself these questions: Are certain groups not renewing their membership? Were retention efforts successful? Why or why not?

4. Analyze Overall Trends. Compare your recruitment rates with your retention rates to make sure your association is gaining more members than it is losing.

5. Identify Members' Desires and Needs. To determine how best to serve your members, you should conduct a survey. For best results, make the survey as easy to complete as possible, for example, by designing it as a checklist that asks members to rank the services that are most beneficial or important to them. You

could also convene a focus group of four or five new members during an annual meeting and ask questions such as these:

What do you like most about being a member? What do you like least? What are your specific needs? What can the association do to improve its services?

Communications with Members and Others

The success of your membership, advocacy, fund-raising and conference planning efforts all depend on how well your association communicates with members, potential members, the public, and those who can effect positive changes for rural health.

Producing a Newsletter

A newsletter is a multipurpose communications tool that offers many benefits to a grassroots organization trying to build a membership base and promote a cause. Consider how these benefits of a newsletter could bolster your SRHA.

- It provides a focus and a rallying point for specific projects.
- It facilitates networking among members and others with rural health concerns.
- It provides an analysis of current events affecting rural health in the state.
- It touts the association's accomplishments and sells the value of membership.

While all SRHAs should consider publishing a newsletter in some form to stay in touch with members and others, new SRHAs may not immediately have the resources needed to develop a highly sophisticated product. Even if you start out on a small scale, however, the newsletter will still be a valuable informational tool. Remember that a newsletter does not have to be elaborate to be effective. Traditionally, newsletters have been printed products, created and distributed on a weekly, monthly, or quarterly basis.

When deciding how often you will publish the newsletter, keep in mind that repetition gets attention. You should publish an issue at least quarterly to have a significant impact. And because consistency is equally important be sure to establish a regular schedule and stick to it.

However often you decide to produce your newsletter, you will have to decide whether it will be in a printed or digital format. The printed newsletter, while still a popular form of communication, can have high startup costs and ongoing costs for design, printing, and mailing. Instead of incurring these costs, many states are moving towards the use of exclusively online newsletters, posted on the SRHA's website or emailed to members. Digital newsletters are becoming more common as people turn increasingly to the internet for their information and more individual homes and offices receive internet services. This chapter includes information for those interested in publishing either a printed or digital newsletter.

Keep in mind that newsletter publishing is not really as complicated as it may first seem. Once you have made some initial decisions about content format and other matters, the process gets easier with each successive issue. Several of these considerations are described in the sections that follow.

Reader's Needs

The success of your newsletter depends on how well it meets reader's information needs- it is crucial to identify those needs before proceeding. You can solicit members' opinions in several ways (e.g., by telephone, mail surveys, or at special meetings with a small group that represents various interests and geographic areas throughout the state). However when you conduct your poll, be sure to ask questions that will clearly identify members' needs and expectations. Consider the following:

- What types of information should your newsletter provide? Analysis? Forecasts? Updates?
- Should the newsletter focus on local and statewide news? Or, should it include regional and national news as well?
- What types of news items would be of greatest interest? News about the SRHA and its activities? About members? About rural health? About state legislation? Also, consider polling members about association needs, such as the need for timely communication, the need to achieve a bigger audience, and the need to spur improvements in rural health. Discuss, too, the need to best convey the current image of the association and its purpose.

Oversight

One member of your staff should be charged with seeing each newsletter through to completion. Is there someone on your staff or a member of the association who has expertise in editing or production? If not, choose someone who demonstrates interest in the project and who has a flair for written communication. Remember to include the cost of this person's time in your budget. When determining the budget, consider how much of the newsletter will be produced in house or by a freelance writer. If your newsletter coordinator or editor is a volunteer rather than a paid staff member, you may even want to provide some form of compensation.

Printing and Mailing

Printing costs vary widely depending on a variety of factors. Your local printer can provide you with various options and cost estimates. When seeking bids, be prepared to provide the printer with the following information

- finished size (dimensions)
- number of pages
- paper stock for the cover and inside pages
- folding and stapling instructions (to save money, you may want to have staff or volunteers do this)
- information about color, photos, illustrations and other graphic elements; and
- the number of units that you would like to have printed.

Digital Newsletter Production

Creating and distributing a unique, user-friendly, and attractive digital newsletter is possible at very little cost. In fact, you can create a perfectly adequate newsletter through

Microsoft Word or Publisher, and send it to your members through your regular email system. However, there are many great, low-cost programs available online which offer an array of services for a more sophisticated newsletter. Some offer templates into which you can upload your logo, add conference and event information, and add stories and links. Others include helpful features such as counting those who open your newsletter,

keeping track of what stories they read, and offer polling and survey services. There are many such companies advertising on the internet—do a little research and find the one that will work best for your SRHA.

Give Readers News They Can Use
Your goal should be to provide information that is immediately useful and inspiring to readers.
Provide Resources - Particularly useful are resources that enable readers to seek additional information on the subject of an article. A name and a phone number or an address is all that is usually needed.

Give Articles the Space They Deserve - Try to arrange articles sensibly, so that the articles likely to command the most attention get the most space. For example, the calendar of events is useful, but probably not worthy of all of page one. Check Facts - A newsletter with factual errors, or even errors in grammar or spelling, will tarnish your association's image. If no staff member or volunteer can check the newsletter for accuracy, hire someone who can. It is well worth the $15 or $25 per hour that a freelance proofreader typically charges. Conduct Accuracy Checks - Allow members who are quoted or mentioned to review the article prior to publication. You would not want to lose a valuable member because his or her job title was incorrectly given or because he or she was misquoted. Invite Feedback and Articles from Members - Ask readers to let you know how you are doing by soliciting articles and letters to the editor. You also can get readers' input by telephone or mail surveys after each issue is published to find out what they liked and did not like, and what they hope to see in the next issue. You may want to establish a committee of volunteers for this purpose.

Content Ideas
You should have no problem filling the pages of your newsletter. With the help of your members, you will quickly have more ideas than you know what to do with (finding volunteers to convert ideas into copy may be a bigger challenge). The following list of ideas will help you get started. You may want to consider making some of these ideas departments, or regularly appearing sections in the newsletter.

- Promote SRHA conferences and educational programs.
- Announce the dates of upcoming meetings and social events.
- Summarize the last general membership or executive committee meeting.
- Announce the dates of relevant national and state conferences.
- Solicit feedback on the newsletter and the association.

- Advertise your products.
- Encourage member participation in association committees, projects or activities.
- Introduce new members and profile existing members.
- Recognize members' job promotions, job changes and honors.
- Highlight accomplishments of the association and report on ongoing efforts.

- Monitor relevant national and state legislative activity.
- Track efforts by other organizations that affect rural health.
- Compile job listings.
- Conduct member attitude surveys.

Public Relations

A public relations campaign can help your SRHA to disseminate information about its efforts and gain support for the cause of improving rural health. A well-executed public relations campaign can generate indirect and direct benefits for the SRHA. Indirect benefits include a good reputation for the association and a positive image for members. Direct benefits include increased membership, better member retention, and more revenue from the association's products and services. Before undertaking a public relations effort, it is essential to identify the many different audiences that constitute the public you are trying to reach, because communication should be tailored with the unique characteristics of each group in mind. A SRHA's public includes the following groups:

- members
- prospective members
- prospective purchasers of SRHA products or services
- government agencies
- state and national legislators
- other organizations and associations with rural
- health or rural health interests
- SRHA leaders
- SRHA staff

Public Relations Opportunities

In addition to your association newsletter, several public relations outlets offer the opportunity to communicate your SSHA's message to many audiences. Consider the following:

- Newspapers
- Magazines
- Television
- Radio
- The World Wide Web
- Advertisements in any of the above
- Educational conference, workshop, monograph, or other product sponsorship
- Legislative testimony
- Public speaking engagements

Organizing a Public Relations Calendar of Events

The public relations plan should include a detailed calendar of events that lists public relations opportunities for SRHA staff and leaders. Such a list should be limited only by your imagination. Following are items appropriate for a public relations calendar of events:

- Announce the publication of the SRHA's annual report or president's letter.
- Describe recent survey results
- Announce an upcoming event

- Provide news about conference programming
- Summarize conference highlights
- Kick off a membership drive or fund-raising campaign
- Oppose or support legislation
- Celebrate the achievements of a membership milestone or an anniversary.

Other Communication Vehicles

You also might want to explore these strategies for effectively conveying information to members, potential members and those in a position to improve rural health World Wide Web Site. Once you have mastered the business of newsletter publishing, consider establishing a presence on the World Wide Web. You can post items from your newsletter, expanding on information that had to be abbreviated to accommodate the newsletter format, as well as membership information and a membership application form, all for significantly less than it costs you to print and distribute these materials by mail. At the same time, you would gain access to an infinitely larger audience. The costs for your Web site would be limited to those associated with designing the Web pages and the time required to regularly update them. Affordable software packages are available for ambitious do-it-yourselfers, or free lancers will develop your site for an hourly rate or on a contract basis. In either case, you should familiarize yourself with the principles of Web site design and user trends.

Identify Ways to Work Together.

Build relationships with other organizations around work on projects of mutual interest. You can pool your efforts in the following ways:

- Cooperation. Organizations agree on the same goals for the activity, but work toward them independently. For example, the SRHA and another organization might agree to support a particular piece of legislation, but each would engage in their own lobbying campaigns.

- Coordination. Organizations work toward the same goals by assisting one another on a related set of tasks. For example, a state office of rural health could provide the SRHA with a legislative analysis and supportive material about a bill, while the SRHA could actively support the legislation as an association representing its membership.

- Collaboration. Organizations work toward the same goals, participate in the same activities, make joint decisions, and are accountable to, and perhaps even share resources with, a partner organization. For example, the SRHA and another organization might co-author proposed legislation, pool their funding to develop a promotional campaign, hold jointly sponsored press conferences, and carry out other activities to further the legislation. Although collaboration is the most complicated approach and requires the most trust and interaction with the other party, it can be the most rewarding.

Possible External Liaisons

The SRHA should establish relationships with a broad range of organizations and agencies throughout the state, such as:

- The state legislature
- Governmental agencies
- The farm bureau
- The cooperative extension service
- Public schools
- Rural utilities
- Chambers of commerce
- Local industry
- Universities
- Area health education centers
- Hospitals
- Local advisory boards of hospitals
- Community health centers
- Mental health organizations
- Health departments
- County boards of health
- Local boards of health
- Organizations dealing with the aging
- Long term care groups
- Youth groups
- Migrant farm worker organizations
- The association of comity commissioners
- The League of Women Voters
- The media

The SRHA Legislative Committee

While grassroots advocacy relies on involvement by the membership, your SRHA's legislative committee should provide the guidance for these efforts. Its specific responsibilities may include:

- identifying and prioritizing national, state and local rural health issues of importance to the SRHA
- analyzing and interpreting legislation and policies; educating members about legislation and public policy
- making recommendations to the board supporting or opposing certain proposals
- coordinating SRHA legislative and public policy activities
- developing and disseminating informational materials about the SRHA and its positions to legislators and policy makers
- maintaining contact with the NRHA's Washington, D.C, office
- developing the framework for new legislation or public policy

For the best results, the legislative committee should broadly represent the SRHA's diverse membership and various geographic regions of the state. Those who serve on this committee should have a deep appreciation for the legislative and public policy process, and the importance of the committee's work. It also helps if at least some committee members have experience in the political arena, or if they have state or national contacts.

In addition to the legislative committee's activities, some SRHAs may find it useful to contract with a registered lobbyist or legislative consultant in their state. If your SRHA retains an advocate, define this individual's role. The advocate should be seen as a team member who provides impetus for the SRHA's efforts, but not as a replacement for the legislative committee or grassroots advocates.

Types of Educational Activities. Some of the ways to educate your members in grassroots advocacy and gain their support include the following:

- Legislative Seminars and Workshops. These seminars and workshops can be held during the SRHA's annual conference, or on a regional or local basis. Speakers could include the chair of the legislative committee, a lobbyist, selected legislators and policy makers, or members of their staffs. Consider special themes for these sessions, such as "How to talk to your legislator."

- The SRHA Newsletter. Articles and updates about recent legislative and public policy issues should appear regularly. Be sure to include statewide issues as well as local ones.
- Special Bulletins. You can draw attention to urgent matters by sending out special email updates, or enclosing a brightly colored insert in regular membership mailings.

Building and Maintaining Relationships

Grassroots advocacy is most effective when SRHA members build ongoing relationships with their legislators and public policy-makers. To foster these relationships, consider the following strategies:

- Get to Know the Staff. Remember that staff aides can be valuable allies. In addition to providing legislators with advice and information, they often serve as the "gatekeepers" who determine which letters are read and who gets in the door. Get to know staff members by name, particularly those who are assigned to health issues.

- Be Supportive. To build relationships, stay in touch with your legislators and policy makers regularly, not only when you want something. Congratulate them on an award, thank them for attending SRHA meetings, or acknowledge their activities in other fields of legislation.