

Research Association New Zealand Strategic Planning 2019-2024

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1 BACKGROUND TO STRATEGIC PLAN AND CHALLENGES

CONTEXT

MEMBER
NEEDS

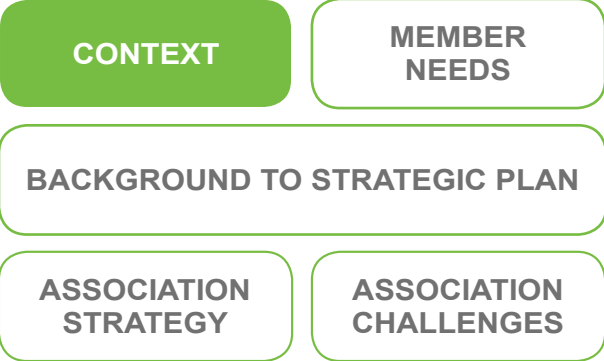
BACKGROUND TO STRATEGIC PLAN

ASSOCIATION
STRATEGY

ASSOCIATION
CHALLENGES

CONTEXT

- The world is changing
- The way information is gathered and generated is changing
- Business models are changing
- Markets are fragmenting
- Client needs are changing
- Researchers and research are changing
- More competition on multiple fronts



MEMBER NEEDS

- Need to stay relevant
- Need up-to-the-minute information
- Need to keep up / adapt / evolve
- Need learning and development
- Need direction and support
- Need to stay connected
- Need forums and communities
- Need standards
- Need advocacy
- Need identity



ASSOCIATION CHALLENGES

- Membership static to declining
- Financial challenges of not growing
- Reliance on volunteers / busy people
- Member expectations rising and dissatisfaction increasing
- Industry disruption, especially digital disruption
- Declining relevance of associations generally in a digital world
- Diverse needs, wants, and capabilities of members
- In effect, many associations competing for limited attention (clients especially are over-supplied)
- Current limited capabilities and resources leading to risk aversion

CONTEXT

MEMBER
NEEDS

BACKGROUND TO STRATEGIC PLAN

ASSOCIATION
STRATEGY

ASSOCIATION
CHALLENGES

ASSOCIATION STRATEGY GOALS

- 'Fit for purpose' 2020 – 2030
- Financially sustainable
- Provide appropriate, relevant leadership to the industry and stakeholders
- Clear purpose, structures, mechanisms
- Deliver value for membership
- The association 'brand' to be meaningful and beneficial to members and their prospects
- Clear roles, appropriate people, able to deliver
- Able to attract partners, sponsors, collaborators, etc.

CONTEXT

MEMBER
NEEDS

BACKGROUND TO STRATEGIC PLAN

ASSOCIATION
STRATEGY

ASSOCIATION
CHALLENGES

2 PURPOSE, VISION AND MEMBER VALUE PROPOSITION

OUR PURPOSE

To Champion
Insights Genius

MEMBER VALUE PROPOSITION

Connect, Promote and Advance
the Powers of Insight

OUR VISION

A smarter NZ through
superior research, data,
insights, knowledge, alliances
and actions

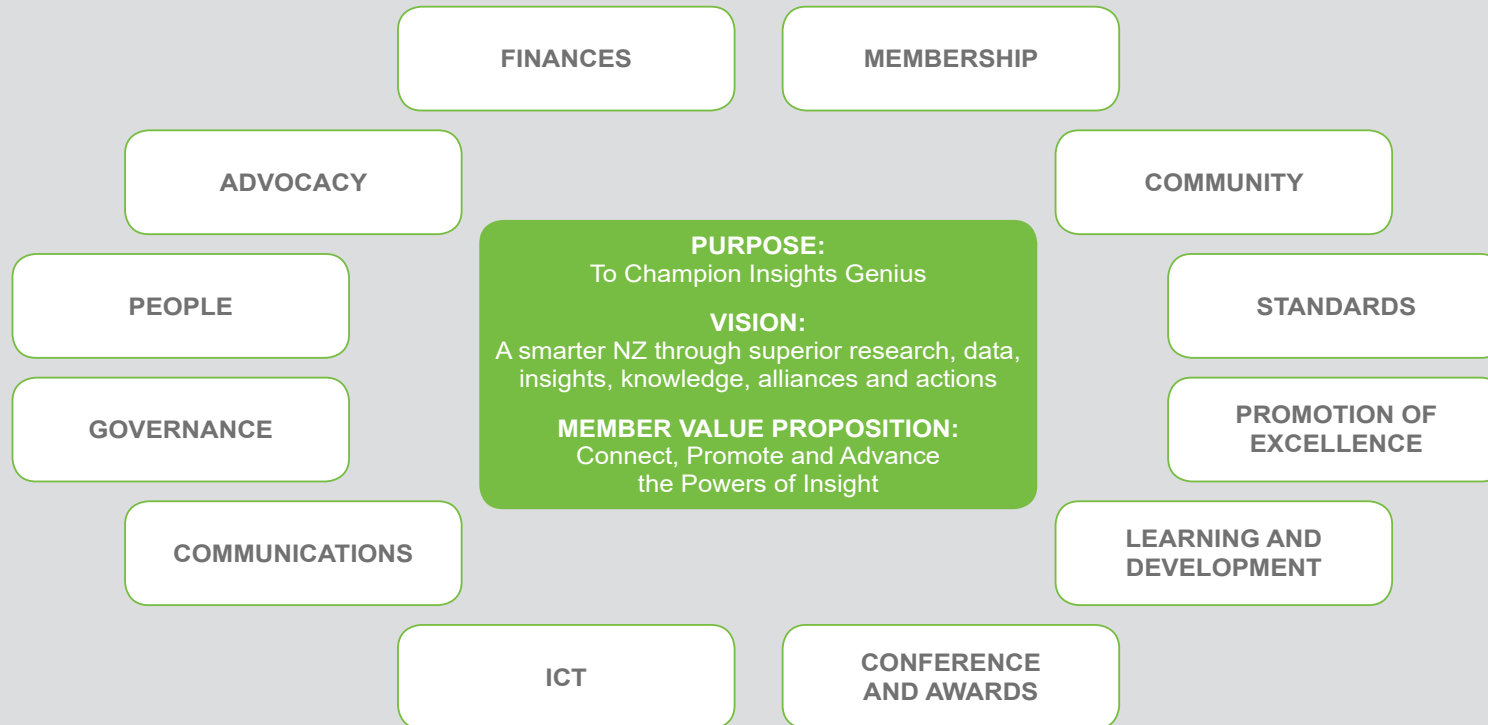
CRITICAL SUCCESS FACTORS



The successful implementation of the plan and achievement of our aims are predicated on the following critical success factors:

1. **Broadened scope / purpose of the association** to ‘champion insights genius’, i.e., wider industry participation, serving a community beyond our current and historic membership
2. **Creation of special interest hubs** or communities within the association, run by members, open to non-member participation, supported by RANZ and ideally strategic partners
3. **Code of Practice that is fit for purpose** with respect to strong ethical standards across the wider insights community, embracing a range of disciplines
4. **Passion for excellence driven by members**, sponsors and non- members, coupled with a willingness to share stories and thought-leader examples
5. **Special interest hubs working to identify their learning and development needs** and appropriate (for them) delivery channels. Supported by RANZ as required
6. **RANZ Conference and RAEAWARDS** becoming more inclusive of other disciplines and non-members to become bigger events
7. **Provision of the right technologies** and platforms to assist and facilitate special interest hubs and other activities
8. **Development of InterVIEW** along more commercial lines as a bigger and better vehicle for all the work being done by members, supporters and the wider insights community
9. **A more diverse Board** with a small elected membership (of 3?) and a much larger appointed membership representing the different interests and needs of the insights community
10. **Having the right people in the right roles** (Board, management, volunteers, etc.) and ensuring they are well focused and supported and, where appropriate, remunerated for their contributions
11. **Appropriate frequency of relevant advocacy** and information to media, government and other stakeholder audiences
12. **Delivery of greater value** to members, supporters and the wider insights community leading to increased non-subscription revenue opportunities through events, sponsorship, advertising, etc.

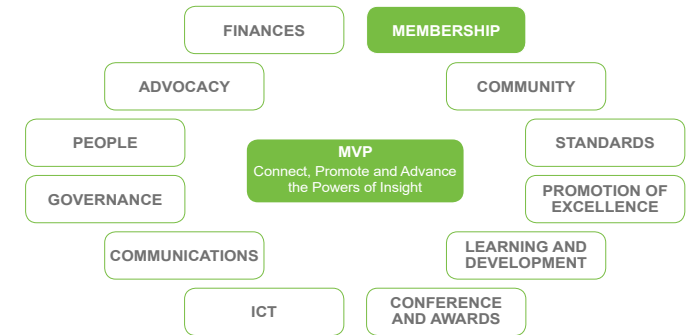
3 TWELVE KEY STRATEGIES



KAA1: MEMBERSHIP

Broaden our scope to become a member association for researchers, clients, data analysts, CX, social research and all NZ insights professionals, assisting them to advance the development of their respective insight disciplines

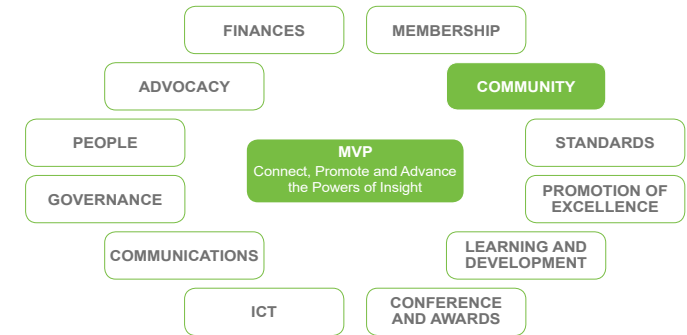
- Offer services that are relevant, valuable, and beneficial to other disciplines, e.g., communications, events, etc.
- Our events and communications need to become much more inclusive of a broader mindset reflective of a much broader range of insight disciplines
- Our Board and other teams need to attract representatives of other disciplines. This would include creating special interest hubs that meet those member needs
- We need to better understand what is most relevant to the client community and which providers are on the leading edge of industry change so that we can proactively approach them
- Collaborate with other industry bodies and networks
- Consider re-brand to reflect broader membership at appropriate point, e.g., 2022



KAA2: COMMUNITY

We will work with members to create and support a set of special interest hubs / communities within the membership. The aim is the connection, advancement, and promotion of those special interests within the industry. We will also support them to be able to attract speakers, sponsors, resources, and alliances that increase their effectiveness

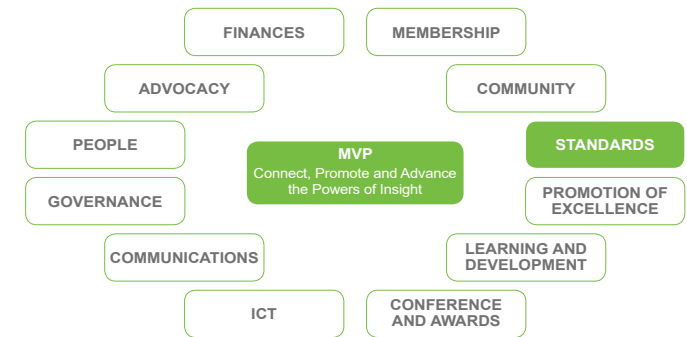
- Work with members to identify what hubs / special interest groups they want
- Support them to formalise some goals and plans for those hubs. Ideally each hub will have someone willing to 'lead' the hub (individual or team)
- Support them to recruit participants, sponsors, etc.
- Using our Communications and Events, help those hubs to distribute their messages and other outputs to relevant parts of our membership and other association memberships
- Work with hubs to facilitate broader membership of those hubs (may or may not require full RANZ membership?)



KAA3: STANDARDS

Our Code of Practice and compliance with it is the cornerstone of our industry. We need to update the COP to reflect legal, societal and business changes, taking into account the digital economy and broadening membership and industry practices

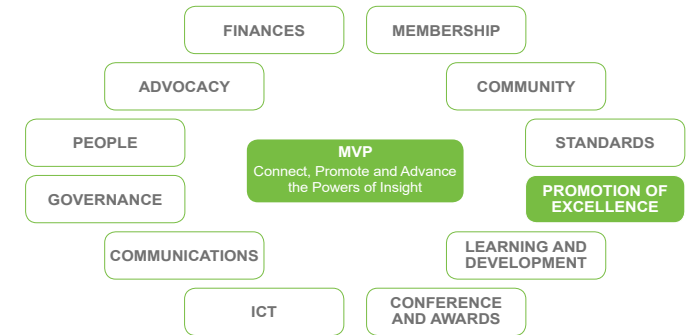
- In 2019 we are due to review the existing COP. The last review took place in 2015. The review takes into account law changes, technology advances, changing social norms, etc., as well as changes of other codes, e.g., ESOMAR, GDPR and other international legislation will be factors to consider
- Promotion of the COP to both internal and external audiences is necessary to ensure high standards are maintained in the insights eco-system
- With our broadening membership we need to ensure that whatever is put in place is effective for a relevant range of different disciplines. This might require us to develop subsidiary codes
- We will review the Complaints Process to ensure that it is fit for purpose. We need to reduce the burden of providing this service on our PSG team



KAA4: PROMOTION OF EXCELLENCE

Facilitate and promote excellence, enabling thought leadership to be made available to membership and beyond. We will work with industry, business, and government leaders to identify what is of most interest and value, and then proactively contact relevant sources and provide access to excellence through appropriate channels

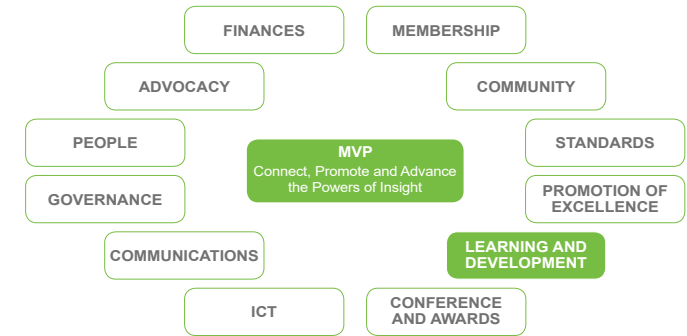
- There are many highly skilled, clever people in our industry in NZ and abroad. There are also many clever people outside our industry doing extremely relevant insights work. We need to develop a means through which it is possible to connect up our members with these people and / or their outputs
- We already have some excellent assets in our website resource centre, InterVIEW, InterimVIEW and our various events. We should utilise those assets (and possibly others) to enhance connectivity and promote those people and their work to various audiences
- Within our teams we need people to be proactively identifying thought leaders and facilitating distribution of their ideas to the membership and other stakeholders
- There may be an opportunity to seek strategic partners to support these efforts



KAA5: LEARNING AND DEVELOPMENT

We will work with member communities / hubs to better understand learning needs and opportunities and then identify most relevant ways to make those opportunities available to the membership

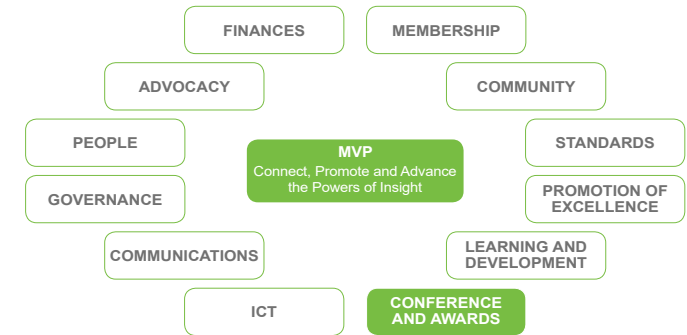
- We currently provide access to Qualified Professional Researcher (QPR) certification through AMSRS and The Learning Centre online portal through GRBN. Due to lack of demand, after consulting the membership, we elected not to develop and provide learning and development services ourselves
- Instead, our focus has been on learning events which are centered on a particular subject, e.g., AGILE Research, Actionable Insights, etc.
- Learning and development activities need to be targeted to specific audiences meeting specific needs. It is our intention to involve the hubs in identifying relevant learning needs for their groups and then support them to develop resources and hold events that are most suitable for them
- Mentoring is part of the learning and development suite we need to consider. How can we put in place a structure for mentoring?
- We will promote these opportunities to the membership and beyond – helping to promote RANZ, the hubs and their special interest areas to wider interested audiences
- Where appropriate we will seek strategic partnerships that will help support those efforts



KAA6: CONFERENCE AND AWARDS

Conference and Awards are our two main opportunities to identify and celebrate excellence. They will be the flagships of our ‘change’ programme, reaching out to diverse audiences and highlighting the value of RANZ membership

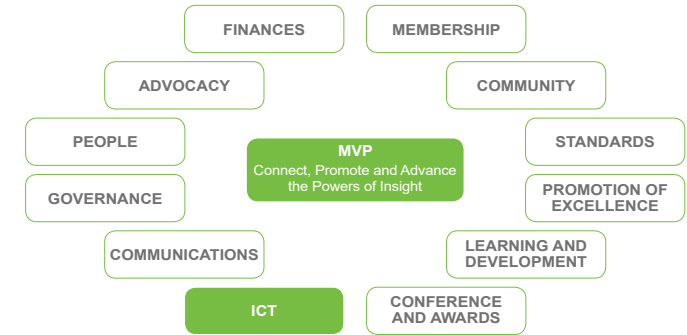
- Members generally agree that our two main events are very well run. There has been comment that the Conference and Awards don't reach out beyond the membership very well and that is part of our ongoing challenge to build market relevance both for our members and our brand
- As of 2019, we will be repositioning the Conference so that it is relevant to a broader audience. We will also be increasing the opportunities for engagement between speakers, exhibitors, sponsors and attendees. The format this year will be over 2 days which will lessen time pressure during the event and offer more space for longer, more productive engagement by all parties
- Where appropriate, we will seek to collaborate with other relevant industries by way of speakers, promotion, etc., to improve connectivity across industries
- We are confident that the revised format will create more opportunities for sponsors and exhibitors
- In 2020, we will run the next RAEAWARDS with similar aims to that of this year's conference, i.e., greater connectivity for members and non-members alike



KAA7: ICT

During 2019, it is our aim to identify and begin to implement better platforms for member engagement. We will recruit some expertise to assist us with this

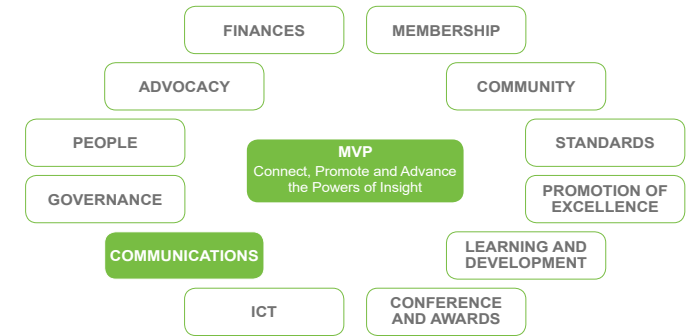
- We have different needs across a very broad base of members, some of whom are 'always online' and some who find technology quite frustrating and intrusive
- We will review a cross-section of available platforms and pricing alongside a needs assessment of what is required for us to become more interactive and efficient at sharing and receiving feedback. Our friends at AUSAE may be able to assist with this. It may also be helpful to survey some of the more tech-savvy members to see what platforms they are using and which ones they recommend
- Without doubt the hubs will be able to suggest platforms that will suit their needs



KAA8: COMMUNICATIONS

Implement new platform for member communications. We also need to integrate our sales and marketing efforts, along with our communication efforts so that communications are more effectively utilised

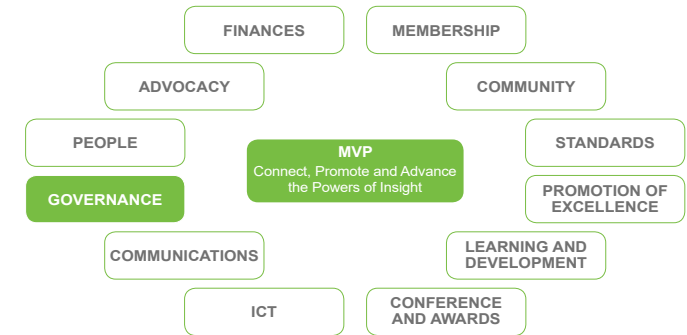
- We currently produce some excellent communications, especially InterVIEW
Receiving and being in InterVIEW is an important member benefit. Let's treat it as such
- InterVIEW is put together by a highly committed team of volunteers with a little paid help.
Populating that team can be challenging and there is reasonable churn within the team
- We believe that there is potential for InterVIEW to become a larger, more broadly read publication with an increasing number of contributors and advertisers. This might require us to explore more semi-commercial models and also be more proactive about finding contributors
- We supplement InterVIEW with InterimVIEW, which is a more frequent e-letter updating members in a quick read about events, interesting information, outputs from government, etc. Is there a more interactive way that we can provide InterimVIEW on a more user-friendly platform, e.g., Linked In, Google?
- The communications project is closely linked to the ICT project
- There may also be a need for a 'curated' repository of relevant, interesting articles, papers, etc.



KAA9: GOVERNANCE

Develop a Board structure and Constitution that enables the association to serve a broader membership and attract and retain the skills of capable, motivated association leaders, advisors, and supporters

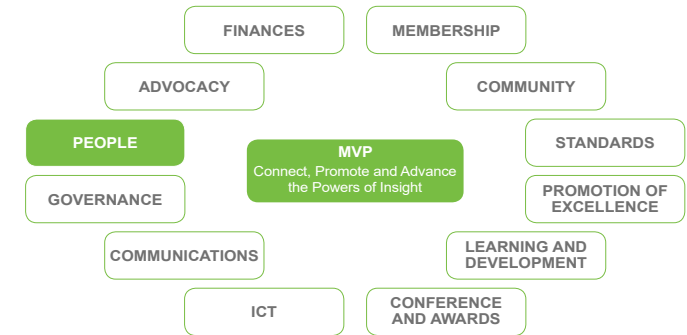
- During the 2019 Constitution revision to meet new legislation, we will define a Board that can be more adaptive to a changing environment and changing member needs. The Constitution needs to empower and enable the Board to connect, advance, and promote the industry and not be bogged down by lengthy procedures and processes
- A key theme of the new Constitution will be 'diversity', by which we mean that the Board itself will be more diverse and reflective of the membership and the marketplace. In particular, we would like to be able to recruit younger board members and members from other disciplines outside our current membership
- It will also be useful to add stability to the Board by reducing the number of 'elected' board members and increasing allowance for 'appointed' board members who bring specific skills to the Board and are not 'churned' in our current two-year cycle. Appointment would need to be in line with our representational goals
- We are seeking improved connectivity and cooperation between the Board and the many teams within the association who together will bring about the association's evolution



KAA10: PEOPLE

As we are largely an association of volunteers, our people are truly our main assets. It is our aim to better organise and reward our people so that their contributions are sought and recognised

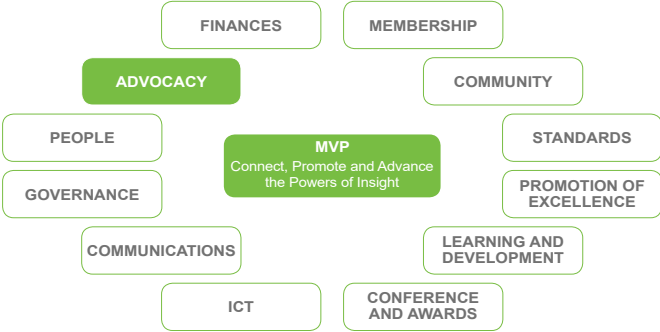
- It is our intention that voluntary roles in the association provide members with development opportunities as well as opportunities to enhance their networks and reputation, while having fun
- Like most associations, RANZ struggles with ‘volunteer fatigue’, i.e., we do a reasonably good job of attracting motivated volunteers onto the Board, Committees, etc., but after a period of time their enthusiasm wanes or situations change and they politely step down. Unfortunately these very talented people are hard to retain and tend to move on at the point around which they are becoming most knowledgeable and useful to the association
- There is a good argument for appointing people to key positions and paying them an honorarium that in a small way recognises and rewards their efforts. We could make these people responsible for oversight of certain areas and they would work closely with the management team, picking up some of the responsibilities currently unpaid or handled by management or the Board
- We also need to be much more proactive about promoting and recognising the people who are active volunteers so that the membership gets an opportunity to thank them for their efforts
- Development of hubs should enable us to progress this initiative quite soon



KAA11: ADVOCACY

Our standards are the basis of our advocacy to government and media. On an ‘as required’ basis, possibly quarterly, we will produce materials and guidelines of interest to those audiences and distribute via various channels and meetings

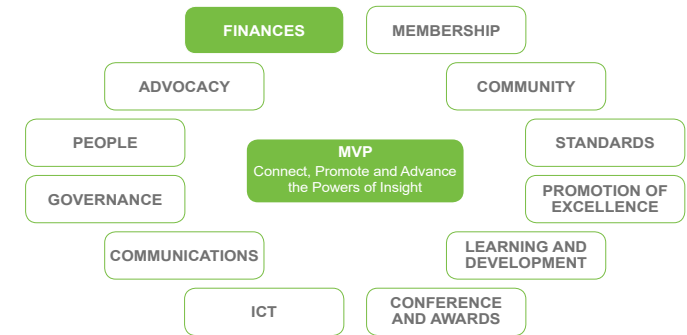
- InterVIEW is an excellent publication and we could increase its scope and distribution to supplement our advocacy efforts. This would most likely require us to increase the resourcing through more paid staffing, sponsorship, and advertising
- With our rewrite of the COP this year, it may be an excellent opportunity to reach a wider audience through public relations, working with Privacy Commission, and writing to a number of other related associations, e.g., MA, ANZA, and CAANZ, etc.
- Ideally the special interest groups / hubs will generate a variety of newsworthy articles that we can provide to media and other audiences



KAA12: FINANCES

In the short term we are constrained by our income capacity. Longer term we will identify additional income sources and / or ways to become more efficient with the incomes we currently receive

- Our current philosophy is to live within our means and we are constrained by a number of factors:
 1. Our reluctance to raise membership fees
 2. The difficulties of attracting new sponsors from outside our industry
 3. Our event ticket pricing philosophy to be affordable and only cover costs
 4. Limited other opportunities for income, e.g., advertising in InterVIEW
- Our staffing model is quite expensive, relying as it does on part-timers. We need a staffing model whereby we deliver more targeted activity from our current wages bill
- We need to create more income opportunities via sponsorships, advertising, and events
- It is not our intention to generate large surpluses but increased funding would enable us to do more. The obvious way to increase funding is to grow the membership but we know from experience that membership growth takes time and requires marketing investments and meetings (all of which require funding)



PURPOSE:
To Champion Insights Genius

VISION:
A smarter NZ through superior research, data, insights,
knowledge, alliances and actions

MEMBER VALUE PROPOSITION:
Connect, Promote and Advance the Powers of Insight

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