TAF

Best Practice Playbook 2025

Insights from the TAF Best Practice Exchange Conference 2025



Contents

00			
$() \prec $	Introd	luction	٦
UJ.	IIILIOA	I UCLIOI	

- 04. Publications
- 06. Events
- 08. Membership Engagement
- 10. Marketing Campaigns
- 12. Media Relations
- 14. Innovation
- 16. Association Transformation
- 18. Governance
- 20. Diversity & Inclusion
- 22. Environmental, Social & Governance Initiatives
- 24. About TAF

Introduction

The Trade Association Forum (TAF) is proud to present the Best Practice Toolkit 2025, a practical, insight-led resource created to support and strengthen the UK trade association sector.

This toolkit brings together expert advice and award-winning case studies from across the TAF membership, offering actionable guidance in ten key areas of association management, from governance and membership engagement to innovation, ESG, and more.

Each section is enhanced with five expert tips, drawn directly from our Best Practice Exchange conference in September 2025 and insight from our expert facilitators.

TAF is the UK's 'association of associations', representing more than 180 trade associations and nearly 190,000 businesses. We champion collaboration, knowledge-sharing and sector-wide improvement through year-round events and resources, culminating in our flagship Best Practice Exchange (BPEx) conference.

Whether you are developing your marketing strategy, refining your member offer, or revisiting your governance structures, this resource is designed to provide you with real-world inspiration and practical tools to drive impact.

We thank all participating members for sharing their experiences so generously, and hope this toolkit helps your association continue to deliver value, voice and visibility for your members.

M.D.



Harry Shackleton
Commercial Director
Trade Association Forum

Publications

Creating Content That Delivers Member Value

2025 Awards Winner Case Study:

National Association of Jewellers Magazine, The Jeweller

The NAJ won the Magazine of the Year Award for their quarterly trade journal, The Jeweller, which is produced in-house.

In 2024, they refreshed the magazine's design and positioned it as an educational resource, by including more actionable advice on compliance, profitability and responsible practices to support members.

Distribution of the magazine was expanded through a partnership with the Company of Master Jewellers, transforming it into a valuable marketing tool for attracting new members and exploring commercial and advertising partnerships.



These changes were well received by members and the wider jewellery community, and successfully supported an increase in NAJ membership recruitment.

Publications: 5 Top Tips

Drawn from a roundtable at TAF's BPEx 2025 conference, these best practice tips will help you elevate your publications:

- Cater to your audience
 - Identify who your audience is and understand their priorities, interests, and challenges. Tailoring content to their needs ensures your publication is relevant, engaging, and adds value.
- Yeep it simple

Make your publication clear and accessible to all members. Use plain language, avoid unnecessary jargon, and keep messages concise to ensure your content is easily understood and engaging for a broad audience.

Enhance brand visibility

Giving members a physical item, such as printed copies of your magazine that they can keep on their desks, can remind them of your association and the value of your work.

Feature member voices

Make your members' voices heard by featuring their insights and achievements. Promote your members to help them feel valued and strengthen their connection to the association.

- **Ensure consistency over intensity**
 - Quality and regularity matter more than volume, and reliable publishing keeps members engaged and reinforces your credibility.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



Aoife Doherty
Secretariat
Trade Association Forum

Award Winner:



Ben MasseyChief Executive
National Association of Jewellers

Events

Designing Engaging, High-Impact Events

2025 Awards Winner Case Study: Railway Industry Association Innovation Conference

The Railway Industry Association Innovation Conference (RIC24) aimed to showcase rail innovation and give members an opportunity to connect with each other and potential customers.

The two-day conference's theme was 'Inspired by Innovation,' and RIA invited attendees to find inspiration in unexpected places by featuring non-railway keynote speakers. Innovations were showcased in creative ways, with 3-minute elevator pitch style TechTalks and a Future Focus Zone to spark conversation about new developments.

RIC24 received extremely positive feedback and strong commercial success as RIA's largest conference since the event began in 2009.



Events: 5 Top Tips

Practical guidance on delivering high impact events, from discussions at the 2025 Best Practice Exchange.

- Diversify speaker line-ups
 - Inviting voices beyond your core sector can invigorate discussion, inspire cross-sector learning, introduce fresh thinking and encourage audience engagement.
- 2 Make the programme dynamic
 Varied, high-energy formats maintain momentum and give attendees and stakeholders more opportunities to connect. Combining structured

presentations with participatory sessions maximises engagement.

Make the theme the experience

Apply your theme throughout the event, creating an impactful experience for attendees. Experiential elements do not have to break the budget - think

about what attendees really want, especially for annual events.

- Collect and act on feedback
 - Ask for feedback following your events and take it on board, using it to deliver future events with increased attendee and stakeholder satisfaction and continually optimise your events.
- Include creative additions

 Enhance conferences and multi-day events with elements that promote wellbeing, inclusivity, and engagement. Thoughtful, creative touches can

With thanks to everyone who took part in the roundtable, and in particular to:

make your event more memorable and distinctive.

Roundtable Facilitator:



Lizzy EatonDirector
Oddity Events and Marketing

Award Winner:



Grace SmithenMarketing & Events Director
Railway Industry Association

Membership Engagement

Strengthening Member Relations

2025 Awards Shortlisted Entry Case Study:

Garden Industry Manufacturers Association's Buddy System

GIMA introduced a new system to support new members to get the most out of their membership.

Board members volunteered to buddy up with a new member organisation, and they were carefully matched with members to ensure that there were no conflicts of interest.

Through regular meetings, new members learned about GIMA's work, how to get involved in the association and how to make sure their voice was heard.

The scheme proved very popular, helping new members to integrate with the wider association while minimising the impact on staff time.



Membership Engagement: 5 Top Tips

Five key takeaways on strengthening member relations, from roundtable discussions at BPEx 2025.

- Put the right people in place
 - Effective membership engagement relies on having a team that is approachable, responsive and genuinely understands your members' needs. Appoint individuals who can build trust, communicate clearly and deliver a consistently high-quality member experience.
- Use the right platforms

Choose technology that helps you understand and connect with your members. The right platforms can capture interests and facilitate communication from the association and within the member community.

Personalise your member engagement

Membership engagement can be time-consuming. With a smaller membership it can be managed by staff, but as the organisation grows, dedicated structures should be established to support engagement.

Connect members with each other

Members may stay for a sense of community and the opportunity to share their success and frustrations with other industry peers who understand their experiences.

Create effective systems

Put clear processes and tools in place to manage member interactions efficiently. Well-designed systems help reduce admin burden, track engagement and identify opportunities for improvement.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



Charles Veal
Director
Membership Insights

Shortlisted at 2025 Awards:



Vicky Nuttall
Director
Garden Industry Manufacturers
Association

Marketing

Getting the Right Message to the Right Audience

Case Study: The Federation of Independent Retailers' Christmas Savings Scheme

The Fed partnered with PayPoint to encourage customers in convenience shops to start saving for Christmas. Using segmented data from 9,000 shops, the campaign targeted likely participants and secured 1,700 sign-ups.

A mix of tailored e-shots, member briefings and field marketing helped reach both PayPoint and non-PayPoint retailers, extending the campaign's reach.

This campaign shows how associations can deliver high-impact, member-focused results through smart partnerships and practical communications.

Interested in more best practice, training and guidance on delivering effective marketing campaigns?

MARCOMMS – TAF's Special Interest Group for Marketing and Communications professionals – offers dedicated support for those working in UK trade associations. Scan the QR Code to find out more:



Marketing: 5 Top Tips

Guidance on getting the right message to the right people, from discussions at the 2025 Best Practice Exchange

Focus on building credibility

Members trust other members, so including testimonials and influencers plays an important role in building credibility and increasing engagement.

- Review progress regularly

 Track as much activity as possible on a weekly or monthly basis, including
 - metrics such as response rates, and use the data to inform next steps and adapt campaigns.
- Emphasise benefits to members

 Frame your marketing and communications around the benefit and value you are providing to members to keep your campaign focused and ensure it resonates.
- Secure leadership buy-in

 It is crucial that your association leadership support your campaign. Invest time in gaining their buy-in by aligning the project with strategic priorities and demonstrating its value.
- Make feedback part of the process

 Ask for feedback and use the information you receive to inform your future projects, to continue improving your approach in line with members' needs and expectations.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



Gaynor PatesMembership Manager
Wood Recyclers Association

MARCOMMS Co-Chair:



Connie Koh-Grieve
Head of Marketing
The Federation of Independent
Retailers

Media Relations

Raising Your Profile with the Press and the Public

2025 Awards Winner Case Study: Federation of Small Businesses

Campaign to Shelter and Protect Small Businesses in the Autumn Budget

The Federation of Small Businesses (FSB) won the Media Campaign of the Year Award in 2025 for their campaign launched following the 2024 General Election.

The campaign highlighted the importance of protecting small businesses to safeguard the economy, jobs, and tax revenues in response to proposed increases in Employers' National Insurance Contributions ahead of the Autumn Budget.

FSB appeared on all major broadcast outlets, and the campaign was featured in all major national newspapers. The Chancellor mentioned FSB in her budget speech, and the campaign resulted in a policy win for members, most notably achieving the hero ask of increasing the Employment Allowance.



Media Relations: 5 Top Tips

Practical techniques to raise your profile with the press and public, from BPEx 2025.

- Set achievable objectives
 - Set clear and achievable aims when starting a media campaign, including some defensive and offensive positions, that play into what the government wants.
- 2. Use government evidence
 Referencing official data or government research strengthens your credibility, helping to validate your position and make your message more persuasive to both policymakers and the public.
- Showcase your expertise
 It is important that you bring evidence that you are an expert on, and have strong spokespeople who can speak about and expand on it with authenticity to convey members' position.
- Invest in media relations early

 Cultivate links with key journalists and broadcast producers early on, as these relationships will be important for driving your campaigns forward.
- Be adaptable

 It is crucial that you adapt when faced with new intelligence, and think about how best to leverage your membership in advancing your campaigns.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



Emily WallaceChief Executive
Trade Association Forum

Award Winner:



Craig BeaumontExecutive Director
Federation of Small Businesses

Innovation

Bringing New Ideas to Life in Your Association

2025 Awards Winner Case Study: Freelancer and Contractor Services Association

FCSA won the 2025 Innovation Award for two new initiatives, veriPAYE and Diligence Hub.

veriPAYE strengthens members' due diligence processes by providing a centralised view of payments made to workers and contractors, enabling them



to identify and resolve potential issues early. The platform also supports compliance by providing independent verification, and on-request audit trails.

Diligence Hub offers a suite of benefits, including provision of vetted and due diligence data on recruiter companies, and a standardised and comprehensive due diligence data pack.

These innovations addressed specific needs within the sector, improving the working lives of over 200,000 freelancers.

Innovation: 5 Top Tips

Techniques to help you bring new ideas to life in your association, from discussions at the 2025 Best Practice Exchange.

Put your CRM to work

A reliable CRM underpins innovation by helping you understand members, identify trends and adapt quickly. Don't wait for perfection, start using your system and refine it as you learn.

Start with a Minimum Viable Product

A minimum viable product is often the best way to start innovating. Launch something simple, see how it works and improve it over time.

Members drive innovation

• Your members are the best source of insight, make the most of tools such as surveys, polls or feedback groups to get a clear picture of what matters most to them.

Recruit an internal champion

Innovation needs someone to take the lead, who can focus on spotting challenges, testing solutions and pushing forward ideas.

Learn from others

Learning from peers who are already experimenting with new approaches and borrowing good ideas saves time and money, and helps you to avoid common pitfalls.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



Association Transformation

Leading Organisational Change with Purpose

2024 Awards Winner Case Study: Chemical Business Association's Comprehensive Transformation

The Chemical Business Association undertook a comprehensive transformation in 2023, to ensure continued relevance to members.

The CBA assessed all areas of its work for fitness for purpose, starting with governance and working back to core principles.

The process involved open engagement with all stakeholders, a focus on team alignment, and a renewed emphasis on purpose, pulling every string to test what was working and what was not.



Transformation: 5 Top Tips

Tips from BPEx 2025 on leading organisational change with purpose.

- Find your purpose
 - A clear, shared purpose is the foundation of a strong association. Revisit your purpose over time, and communicate it to members, staff and stakeholders to ensure alignment.
- Focus on relevance

Always ask why an activity or service exists, and be prepared to stop doing something that no longer serves members. Review activities regularly to maintain focus and impact.

Define your member relationships

Striking the balance between being member-led and member-leading is crucial. True engagement means uniting members around shared goals, and regularly maintaining open dialogue.

Align governance with purpose

Sound governance is the foundation of meaningful change. Your structure and articles of association should be clear, modern and reflective of your purpose.

Equip your people to lead change

Your team is your greatest asset, invest in their development through clear induction, skills audits and engagement reviews to enable confident, informed decision-making.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



Harry Shackleton
Commercial Director
Trade Association Forum

Award Winner 2024:



Tim Doggett
Chief Executive
Chemical Business Association

Governance

Improving your Governance to Drive for Better Outcomes

Case Study: International Rope Access Trade Association's Governance Review

The International Rope Access Trade Association (IRATA) undertook a thorough review of its Articles of Association to ensure they remained relevant, effective and aligned with the organisation's strategic goals. The process involved legal input, structured Board discussions and open consultation, which helped build consensus on the proposed changes. When put to a member vote, the revised Articles were approved by a large majority, a clear indication of strong engagement and trust in the process. The success of the review was underpinned by a collaborative and transparent approach, a focus on practical governance improvements, and a clear commitment to ensuring the framework served the association's current and future needs.

TAF Members can access a huge range of Governance Resources in the TAF Library.

TAF's Resource Library contains a wealth of material covering all aspects of trade association management, but with a particularly strong focus on governance. From 'how to' guides to webinars, scan the QR code to find out more



Governance: 5 Top Tips

Actionable advice on how to improve Articles of Association for better decision-making, from the Best Practice Exchange 2025.

- Schedule regular governance reviews
 - Associations need to review their governance structures every few years, as described in the articles of association.
- 2 Audit your board composition & skills
 Governance reviews should consider the composition of the Board, including
- the numbers and responsibilities of elected and appointed Directors, and term limits.
- Clarify roles and responsibilities

 Clearly define the roles of your board, committees and advisory groups to avoid duplication, confusion or gaps in accountability. A well-structured governance framework empowers each group to contribute effectively,

aligned with your association's mission.

- 4 Ensure your articles are clear and current Your articles should outline the association's purpose, membership classes, voting rights and Board matters in a clear and accessible format.
- Balance continuity and renewal

 Introduce term limits, succession planning and rotation policies to ensure fresh thinking while maintaining stability. A healthy governance cycle supports agility and long-term strategy.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



John PeacockDirector
Governology

Case Study from:



Sheila Kondaveeti Chief Executive International Rope Access Trade Association

Diversity & Inclusion

Making DEI Meaningful and Measurable

2025 Awards Winner Case Study: BPI (British Recording Industry)

BPI won the Diversity & Inclusion Award for their inaugural five-year Strategy for Diversity, Equality & Inclusion, highlighting the need for collaboration and a collective industry approach. The long-term strategy, from 2023 to 2027, includes a wide range of initiatives across three strands: Advocate and Amplify, Lead the Recording Industry by Example, and Connect and Support our Members.



2025 Awards Shortlisted Case Study:

British Coatings Federation

The British Coatings Federation (BCF) established an ED&I Committee to drive meaningful progress across the sector. This led to the creation of an ED&I Hub and Charter, offering resources, guidance and benchmarking tools to support members at every stage of their inclusion journey. The initiative has helped embed ED&I principles into member organisations and fostered a more collaborative approach to shared challenges.

DEI: 5 Top Tips

Five key takeaways from BPEx 2025 to help make DEI meaningful and measurable.

- Set a purpose
 - Establish trust with member organisations by clearly explaining the purpose of gathering diversity and inclusion data, and the value it brings.
- 2 Build momentum over time
 Diversity and inclusion is a long-term commitment. Recognise that progress takes time, focus on steady improvement, and prioritise getting started.
- Foster an inclusive culture

 DEI is about more than diversity, it is about promoting inclusive cultures where everyone feels safe, welcome and respected.
- Accept it's a journey, not an event

 There are often more questions than answers in this process and, that is okay.

 DEI work is not always easy, but it is an important element of trade association activity. Progress may not always be linear, but stay committed and reflect as you go.
- Equip your members with practical tools

 Trade associations are uniquely placed to guide their members on DEI. Share clear, actionable resources such as toolkits, training, and templates with your members. Your leadership can help embed inclusive practices sector-wide.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:

Caroline Gordon
Founder
Mix Partners

Award Winner:



Hailey WillingtonDiversity, Equity &
Inclusion Manager
BPI

Shortlisted at 2025 Awards:



Zoe SladeSustainability Manager
British Coatings Federation

Environmental, Social & Governance Initiatives

Turning Responsibility into Action

2025 Awards Winner Case Study: GAMBICA Environmental Impact Survey

GAMBICA won the E/S Initiative of the Year Award in 2025 for the Environmental Impact Survey.

The survey reported two aspects: an individual report created for and sent to each participating member, and a benchmarking report. Participants could access a breakdown of their CO2 emissions across different business areas, enabling them to see where their output is highest.



Members who complete the survey become Environmental Impact Champions within the sector, receiving a badge that they can add to their website, social media and other communications.

ESG Initiatives: 5 Top Tips

Actionable advice for turning responsibility into action, from discussions at the 2025 Best Practice Exchange.

- Engage the right people
- Involve staff, members, and stakeholders from the outset to ensure your ESG initiatives reflect the priorities and realities of your sector.
- Provide industry benchmarking

 Sharing data and insights helps demonstrate collective progress and highlights areas for improvement, promoting transparency and accountability.
- Recognise and celebrate progress

 Celebrate achievements at both organisational and member level.

 Acknowledging success reinforces engagement, builds momentum, and encourages wider participation in ESG efforts.
- Use the insights gained from benchmarking and member feedback to refine your ESG goals and integrate them into your wider organisational strategy.
- Communicate clearly and consistently

 Communicate your ESG objectives, actions, and results clearly and regularly.

 Transparency builds trust, while consistent messaging strengthens your association's reputation and influence.

With thanks to everyone who took part in the roundtable, and in particular to:

Roundtable Facilitator:



Crispin SykesDirector of Sustainability & Net Zero
Climate Action for Associations

Award Winner:



Ruby SmythCommunications Manager
GAMBICA

About TAF

TAF is the UK's 'association of associations,' a community of more than 180 trade associations encouraging the development and sharing of best practice among UK trade associations and promoting the role of effective trade associations to government, industry and the wider public.

We focus specifically on trade associations, and that focus helps define everything we do. Our 180 trade association members represent close to 190,000 UK businesses, making TAF one of the largest representative bodies in the country.

Whether helping associations share best practice, or helping our members help their members transition to net zero, TAF is at the heart of the UK association community and working every day to help support our sector.

Find out more:

0

(0)20 8080 3316



secretariat@taforum.org



taforum.org

Not a member?

Scan the QR to learn more:



