

Critical Analysis of Common Association Research Challenges

A Strategic Whitepaper by Association
Laboratory Inc.

White Paper on Association Research Challenges

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Introduction

Many associations have worked hard to establish strong, member-driven organizations. By continuing to focus on building the association's understanding of the market and developing systems to more fully link member needs with organizational structure and resource investment, the modern association can maintain the highest levels of membership value, and create long term sustainable initiatives to improve member acquisition, satisfaction, and retention.

As the organization matures, it becomes more difficult to identify a "silver bullet" answer to its challenges. As a result, the successful association understands the need for making incrementally better decisions over time.

As the services and the constituencies of the association continue to expand, the ability of staff and volunteer leadership to make informed decisions will become even more vital. You can do anything you want, just not everything you want.

Three important questions must constantly be considered by associations if they are to remain successful.

- How does the association deal with the wide range of needs from a complex audience with limited resources?
- How does the association invest in new, innovative programs, while maintaining a solid core of services that address both the existing and future needs of the membership?
- How does the association successfully position itself in a more competitive environment vs. other organizations?

An integrated research strategy offers guidance to associations to help them answer these questions. By investing in the ongoing collection of independent, objective information, and the translation of this information into business insight, association executives can anticipate and pre-emptively respond to changes within their business climate instead of react to them.

The following information represents a diagnosis of common association challenges in developing and effectively using research.

Perceived Barriers to Improved Use of Research

Association Laboratory has identified several key barriers to the effective use of research during its work with trade, professional, credentialing, and philanthropic organizations.

“Research” throughout this document is defined as any process that collects data.

Research may range from complex formal research projects using external consultants and specialized providers to simple, ongoing data collection projects that are linked to the operations of the association, such as dues collection, that may not be traditionally considered “research”.

Research Data Utility

Overall, most associations lack a coherent research strategy, centralized research function, and/or sufficient procedures for engaging a research department or supplier. This makes awareness of the existence of internal information, and the use of this information, more challenging for both decision-makers and research staff. This reduces the utility of the research in supporting decisions.

The following details some common concerns with research utility:

- Lack of information awareness

Decision-makers often are not aware, or have a varying level of awareness, about the existence of internal association information. Studies are often implemented within a specific business domain or department, and other staff members that might also benefit from this information are unaware that a study has even been implemented.

This reduces the transfer of information across association domains or departments and between decision-makers. It also results in less organization-wide learning, which increases research expenses by reducing efficiency as departments duplicate research that has previously been conducted at some level.

- Lack of information access

While association staff might have an awareness that some research may exist, there is often confusion over how best to access this information within the association, or a perceived inability to access the information, given the existing capabilities of the current technology, database, or staffs' abilities to query association data systems (or each other).

This perceived lack of access discourages staff from using research in decision-making because it represents an additional bureaucratic step without clear value, but with a distinct cost in time.

- Doubts about information quality

Association staffs often indicate varying levels of uncertainty regarding the quality of research information. This lack of trust means that many decision-makers do not believe the information that exists is credible for decision-making.

This lack of credibility manifests itself in the following forms:

- There is a lack of trust in the validity of internal data within the association's database because individuals are not convinced that this information has been entered correctly, or contains information on a sufficient number of members or customers to be representative of the larger market universe.
 - There is uncertainty over the validity of information collected through external research because of doubt over the rigor of research design and data analysis.
 - Research is often conducted of a known audience; for example, the association always surveys the membership. This limited sampling strategy creates doubts because there is no external benchmark or comparison among studies allowing staff to validate conclusions based on collected information.
- Frustrations with data format

Association staffs are often concerned about receiving information in a format that makes it difficult to analyze, and distrustful because of the fragmented nature of the information received.

While the information to support a decision might exist, this information is sometimes in a written format that makes analysis and understanding difficult for decision-makers without specific training or education in research.

Not every research project will necessarily require a formal, written report. The necessity of a formal report is dependent on the decision-maker and the researcher agreeing on a common reporting format.

Episodic Nature of Research

Research is generally initiated by association staff at a specific point in time to address a specific research question for a specific departmental program or initiative. Following the research study, the results may or may not be shared throughout the association.

The episodic nature of research reduces the quality of subsequent research and reduces the incremental learning within and across departments from the research results. The following are specific areas of concern:

- Research is not planned in advance as part of a coordinated effort. This results in research that is too reactive and provides less predictive information.
- Research studies implemented once are not used on a consistent basis to improve follow-up survey instruments so that better quality data is collected in subsequent research projects. This reduces the association's learning from one project to the next and does not allow research activities to improve.
- Most associations do not conduct longitudinal studies. There is not a consistent pattern of creating research studies to collect information over time. This reduces the possibility for trend collection and analysis and reduces knowledge creation as decision-makers fail to adequately learn from preceding research projects.
- While individual departmental decision-makers may benefit from a distinct research project, there is a lack of discussion of results between departments. Thus, the learning from a distinct study remains within a small sphere of staff.

Since most associations do not have an integrated research strategy, each individual staff person experiences a significant learning curve in their domain, which reduces their effectiveness.

Episodic research results in a continual learning curve that reduces or eliminates incremental learning. This means that instead of financial investments in research resulting in improved decisions, they are simply a project expense with no accrued benefits beyond the specific project.

Utilization of Research Infrastructure

Research Resource Allocation

There are three main types of information:

- Descriptive – objective statements of fact (ex: age, gender)

Many association staff identified a lack of descriptive information and limited confidence in the information that does exist within their databases. This reduces decision-makers' ability to accurately define audiences for service, compare audience behaviors, and effectively target distinct audiences.

- Diagnostic – retrospective identification of success or failure from program execution (ex: satisfaction)

A wide range of diagnostic information is often collected by associations ranging from dues renewal to conference evaluations. This information is not effectively aggregated across departments or trended across time. This reduces the effectiveness of this information to guide decisions other than the modification of existing programs.

- Predictive – prospective identification of potential opportunities or threats in the future (ex: likely change in government policy)

Very little predictive information or modeling of future behavior patterns is collected by most associations. This limits the association's ability to identify changes in the business climate to guide association strategy.

A good strategic research plan helps the association balance these three areas to provide the highest quality and most useful information for decision making.

Optimally, the resources of the association would be allocated in a coherent fashion across all three categories based on the strategic and tactical needs of decision-makers.

Based on its work with associations, Association Laboratory has concluded the following:

- There is poor or inconsistent descriptive information on key audiences.

For example, decision-makers are not comfortable with their ability to segment distinct audiences based on criteria such as age or gender.

- Associations place an overreliance on diagnostic information, meaning too much focus has been placed on “what” happened vs. “why” something happened or “what will happen” in the future.

For example, some decision-makers, while satisfied with the data they receive, may feel that the research told them what they already knew by simply describing the behaviors of the research subjects but not explaining the motivations or reasons driving this behavior.

- There is limited focus and corresponding resources on collecting predictive information, meaning the organization looks backward to past performance to guide decisions instead of looking forward to potential changes in the environment and markets to guide decisions.

Association Laboratory has concluded that relatively limited resources are being allocated to collect information that may help decision-makers prepare for future changes in the business environment. For example, while information is collected on the status of specific pieces of legislation, studies are not implemented to predict future changes in the business environment that may drive changes in legislation.

The lack of resources allocated to predictive information creates doubts about the validity of already-collected information to act as a predictor of future behavior, or to act as an accurate barometer of audience needs or desires.

While retrospective diagnosis allows decision-makers to identify where problems might exist with current offerings, it does not help decision-makers identify future needs or design new solutions to problems.

Closing

Good research is an investment.

A well thought out research strategy supported by a modern research infrastructure can provide phenomenal insights to association executives. These insights applied to the decisions of the association have the power to improve a wide variety of outcomes important to the association.

Each additional study, piggybacked on proceeding studies, incrementally improves the knowledge of the organization. Financial and staff resources are thus an investment in improved outcomes. As knowledge increases, the cost of each subsequent research project is reduced because less work is necessary to accomplish the research goal.

The modern association, to prosper in a dynamic business climate, will invest the resources necessary to develop and implement a comprehensive research strategy to provide the insights necessary to adapt within this challenging environment.

About Association Laboratory Inc.

Company Background

Association Laboratory Inc. is one of the nation's leading association research and business strategy firms. The company is widely recognized as an industry leader in the research and analysis of association information and the development of business strategies designed to address association management challenges.

Association Laboratory Inc. has established a national reputation for excellence in the delivery of consulting services to associations. The respect for the company's innovation and abilities is evidenced by continued participation as conference speakers, authors in industry publications, and service in local and national association leadership positions.

Author Background

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Dean West is the founder and President of Association Laboratory Inc.

Mr. West is a nationally recognized expert in association management and consulting. He is a Fellow of the American Society of Association Executives & The Center for Association Leadership (ASAE & The Center). In addition, he currently serves on the Editorial Board for the Journal of Association Leadership and as a member of the ASAE Membership Section Council. He has also served in volunteer leadership roles as the Chair of the ASAE Professional Development Section Council. Mr. West has also served as a member of the Board of Directors of the Association Forum of Chicagoland.

Dean West frequently speaks and writes on association management issues. He authored key chapters for two ASAE & The Center publications: the chapter on marketing professional development programs for Best Practices in Professional Development and the chapter on membership research for Membership Marketing Handbook.

Mr. West is a former association executive director and senior executive for one of the nation's most respected association management companies.