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Looking Forward 2014

An Environmental Scanning Whitepaper
for the Association Industry

“We often confuse what we
wish for with what is.”

— [Neil Gaiman](#), *[MirrorMask](#)*

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Introduction

Overview of Association Environmental Scanning Project

The annual Association Laboratory environmental scanning project identifies critical factors affecting associations and potential implications for association strategy. To obtain data for *Looking Forward 2014* Association Laboratory conducted an online survey targeting association chief staff officers and executive staff.

Participants identified the trends of most concern across a range of topics from the perspective of their association's members including:

- Information management
- Government activities
- Workforce issues
- Economic conditions
- Global forces

For each topic area outlined above, association executives were asked to select from a list up to three issues or concerns that would most impact their members over the next twelve months. For example:

Which of the following government activities do you believe will most impact your members over the next 12 months? Please select up to three categories.

Following selection of the issues likely to have the greatest impact on members, they were asked to identify how those issues or problems would affect their own organization. Again they were provided a list and asked to choose up to three likely effects or outcomes. The corresponding question for government activities is presented below.

Given the situation you just described, how concerned are you about each of the following issues affecting your organization in the next 12 months?

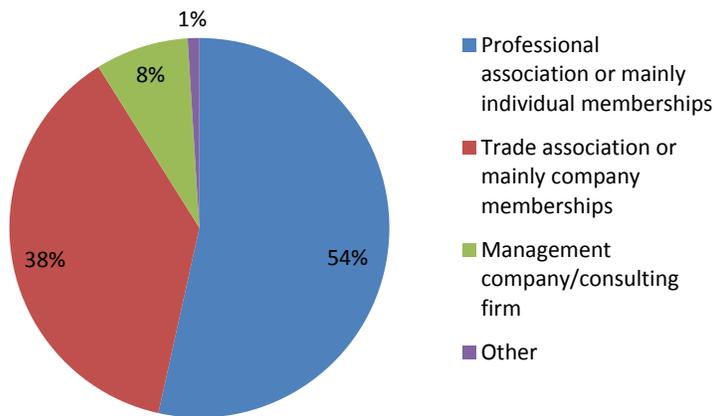
A total of 195 individuals completed the survey; a sample of this size has a margin of error of plus or minus 6.9% at a 95% confidence level.

This means that if we repeated the survey 100 times with different samples from the population of association chief staff officers and executive staff, 95 out of 100 samples would yield a result within plus or minus 6.9% of the statistic reported in this study. For example, if an answer is offered by 50% of respondents, the results would range between a high of 57% and a low of 43% for 95 out of 100 other samples from the same population.

Description of the Sample

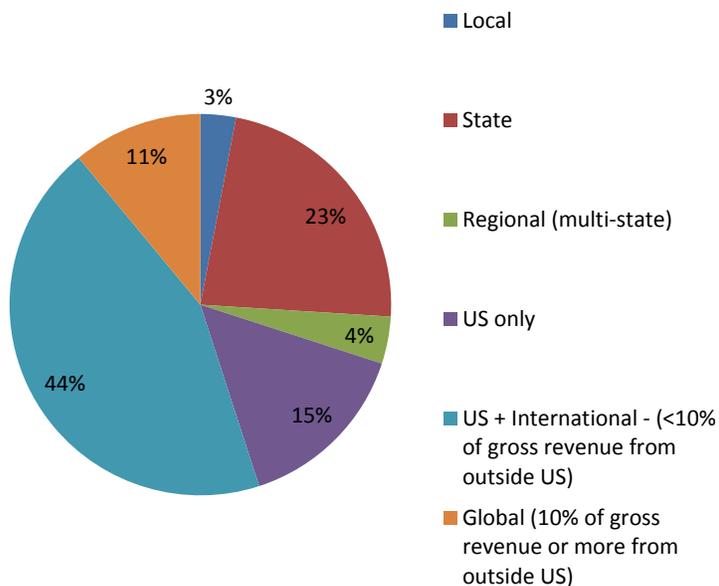
One hundred ninety five (195) individuals responded to the survey. Over half are executives at professional associations; most others are from trade associations. Less than 10% are consultants to associations or executives at a Chamber of Commerce or similar organization. Data for *Looking Forward 2014* was collected in November 2013.

Organization Type



The balanced response provided for good insights into similarities and differences between trade and professional associations. These are highlighted where appropriate in this report.

Geographic Scope of the Organization



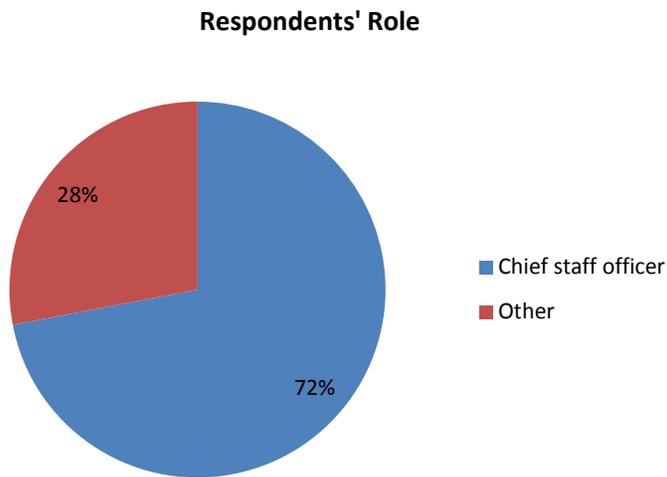
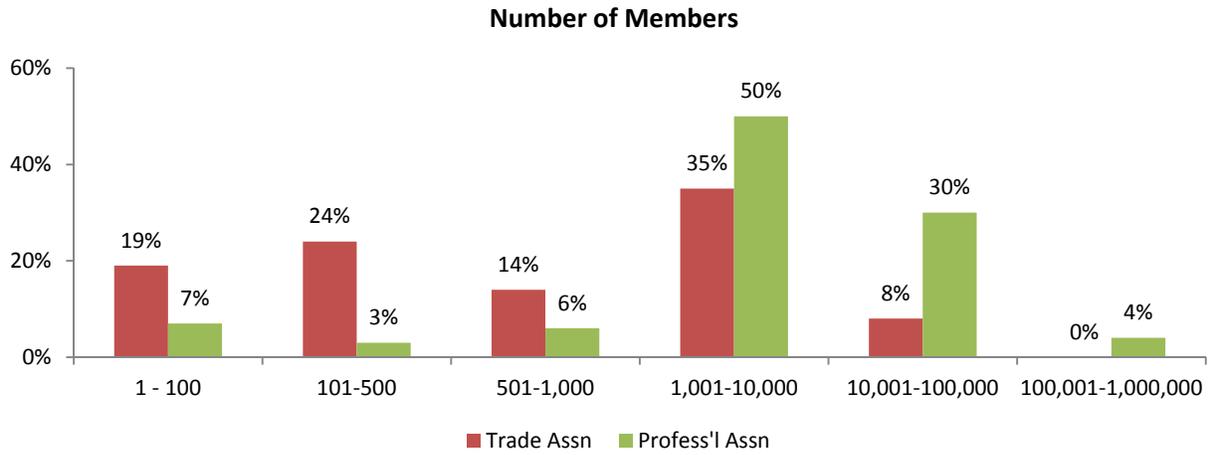
The study collected input from executives representing organizations from local to global; 69% of respondents are from associations that are predominantly national in scope.

Respondents represented more than 30 different industries/professions. Education, health care, and science/research are the leading professions in the professional association sample; construction, finance/insurance, manufacturing, and real estate and rental are the leading industries in the trade association sample.

Trade Associations (n=74)	
Administrative and Support and Waste Management and Remediation Services	3%
Agriculture	9%
Arts or entertainment	1%
Construction	21%
Devices	1%
Education	8%
Finance and Insurance	13%
Food Services	5%
Forestry	4%
Health Services (nonclinical professionals)	8%
Health Services (other clinical professionals)	8%
Health Services (physicians)	5%
Other healthcare	5%
Hotel, convention or other accommodation	4%
Information	4%
IT Services	7%
Other information technology products/services	4%
Management of Companies and Enterprises	4%
Manufacturing	26%
Medical device, manufacturing or laboratory sciences	4%
Mining, Quarrying, and Oil or Gas Extraction	3%
Pharmaceutical	3%
Professional, Scientific, and Technical Services	7%
Public Administration	3%
Real Estate and Rental and Leasing	12%
Recreation	3%
Retail Trade	9%
Telecommunications	5%
Transportation and Warehousing	12%
Utilities	8%
Wholesale Trade	5%
Other	14%

Professional Associations (n=105)	
Agriculture, farming or veterinary	3%
Architecture, art or other design	3%
Armed services (active or retired)	1%
Athletics, sports or music	1%
Banking, finance or insurance	8%
Business consulting or other professional services	8%
Commercial heating, cooling, masonry, carpentry, plumbing, electrical or other trade	1%
Education administration or consulting	11%
Educator	15%
Engineering	8%
Equipment installation, operation, supervision, maintenance or repair	1%
Executive or corporate management (HR/Finance/Marketing/Etc.)	5%
Fire, law enforcement or security	3%
Food or beverage preparation or management	2%
Health care administration	12%
Health care executive	8%
Health care provider (MD)	19%
Health care provider (other clinician)	20%
Health care provider (RN/ARNP)	8%
Health care technician	6%
Information services or web development	6%
Landscape contracting, gardening or grounds management or maintenance	1%
Legal, policy, regulatory or compliance	9%
Office administration or clerical	2%
Personal or household services	1%
Residential heating, cooling, masonry, carpentry, plumbing, electrical or other trade	1%
Retail management or service	1%
Science or research	15%
Tourism, travel, meetings or hospitality	3%
Transportation or logistics	1%
Other	15%

Trade associations typically have fewer members than the professional associations in the sample.



Nearly three of four survey participants are chief staff officers at their association.

Other respondents to the survey include senior executives representing a range of different association business domains.

Respondents identified the areas in which they primarily spend their time within the organization.

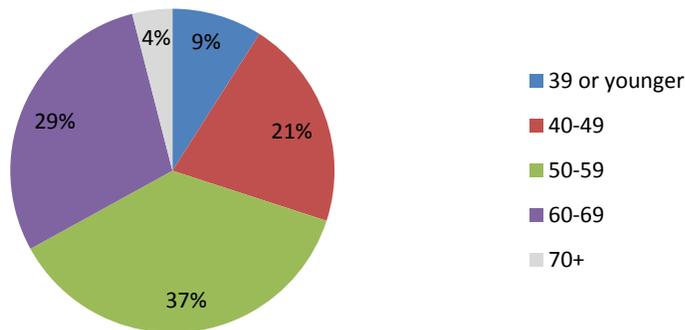
Main Functions Performed



Function descriptions are based on the outline of activity developed for the certified association executive (CAE) exam.

As expected from a predominantly chief staff officer response group, administration of the organization was the most significant area of activity.

Respondent Age



Most respondents are between 50 and 69 years of age.

In addition, more respondents are male (55%) than female (45%).

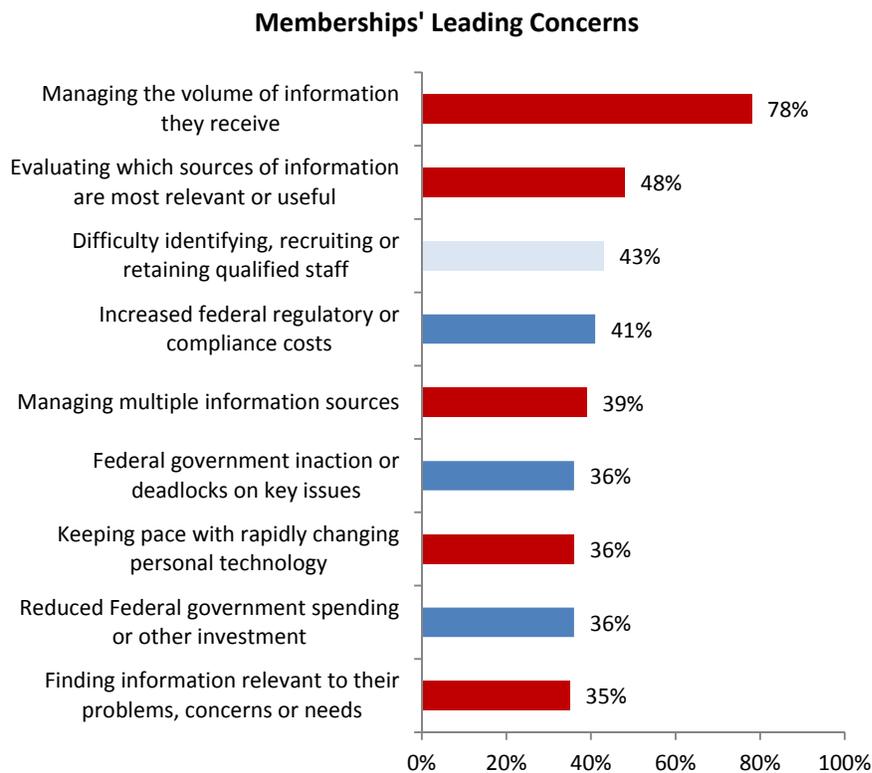
Overall, the survey was answered by a diverse group of chief staff officers and senior executives, providing a strong overview of the association industry, the environmental factors association executives believe their members consider important, and the likely implications of these factors on association strategy.

Overview of Influences on the Association Environment

Primary Environmental Factors

Qualitative research identified sixty-three (63) potential environmental factors with significant impact on association members. Response options were customized to the perspectives of trade and professional associations.

Managing information was overwhelmingly identified as the primary concern of association members.



Five of the nine concerns most often selected pertain to information management (red bars).

Association Laboratory concludes this outcome reflects growing concern over the increasing amount of information being produced and the challenge of determining which information is important and trustworthy.

Three of the four remaining concerns relate to governmental activity (darker blue bars).

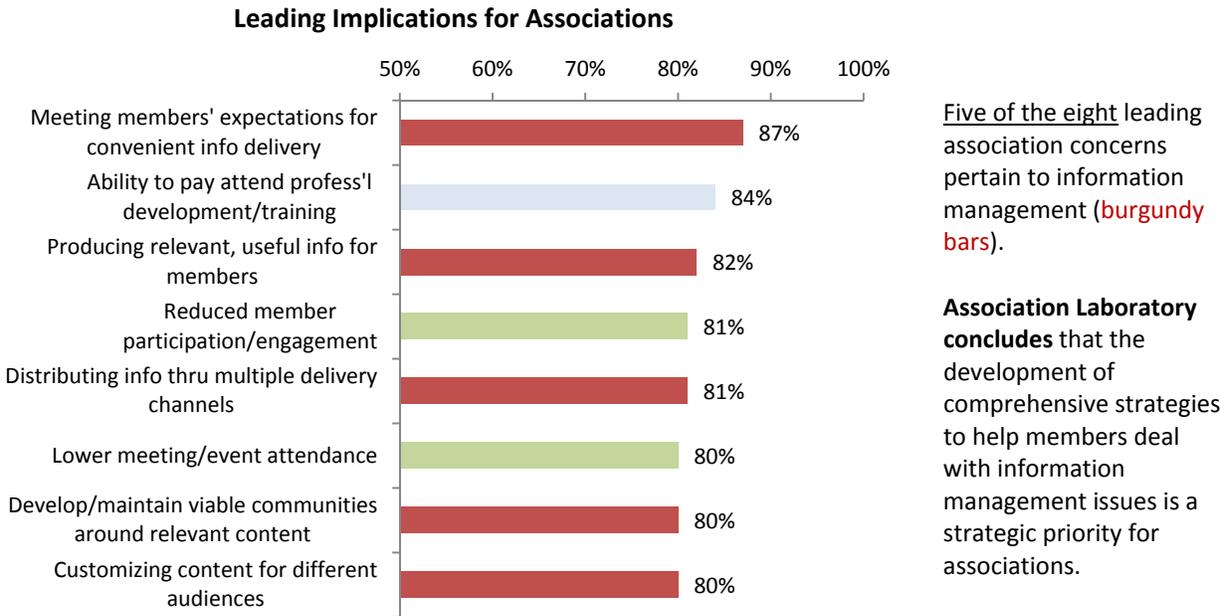
The final leading concern (pale blue bar) relates to workforce management. Given public concerns regarding the economy and high unemployment, this is a surprising result and may reflect a mismatch between employment needs and job skills.

Primary Implications on Association Strategy

The study tested fifty-five (55) different potential implications on association strategy related to the environmental factors identified. Specific implications were linked to groups of environmental factors (such as information, economy, and government).

Looking at the leading implications association executives identify as most likely to affect their own organizations reinforces the importance of information management.

Eight different implications were identified by 80% or more of respondents reflecting a diverse range of association executives' concerns.



Other issues of concern to the largest proportion of association executives stem from environmental factors in the workforce (pale blue bar) and the economy (green bars) that threaten associations' financial stability.

The following sections provide additional detail regarding specific environmental factors and the resulting implications on association strategy.

Information Management

Abstract

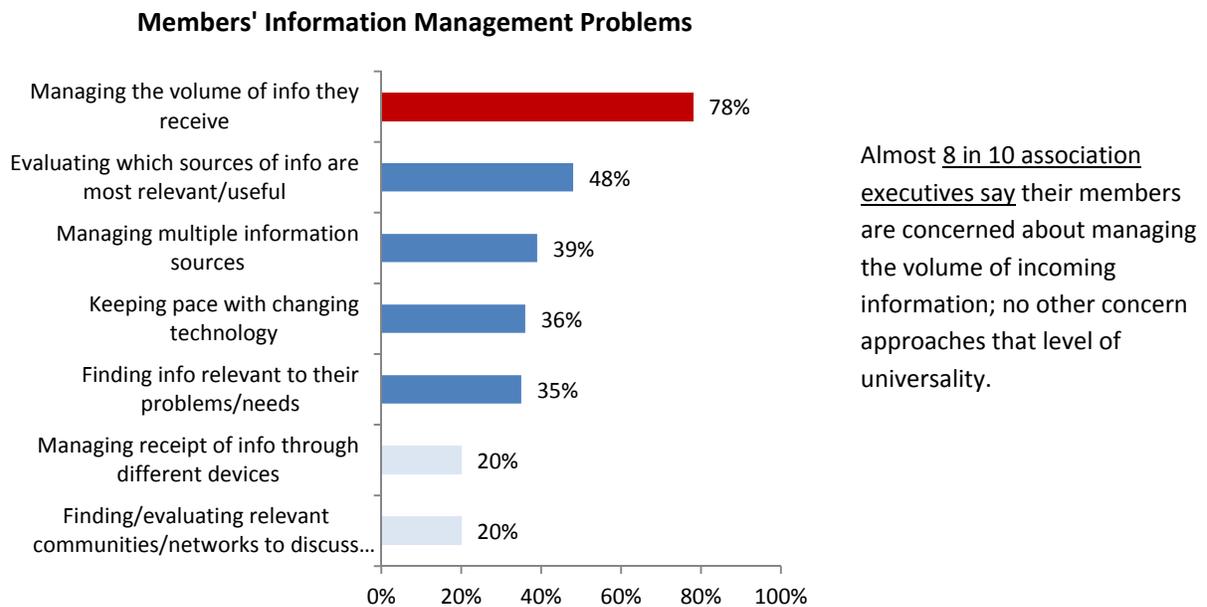
Information management is the leading environmental concern identified by association members; association executives are struggling to manage members' expectations regarding information management issues.

Members' challenges with information impact associations in a variety of areas ranging from their ability to manage members' expectations to developing and providing relevant information through multiple delivery channels. Associations play an important role in helping their members sift through massive amounts of data to identify the information that will be of most importance to their industry or career.

Association Laboratory concludes that associations will continue to be a critical resource for members but that the development of comprehensive strategies to help members deal with information management issues is a strategic priority for associations. Associations need to assimilate industry or professional data, transform it into information, and communicate it to their membership quickly and efficiently, as well as in a context pertinent to the decisions members are making.

Association Members' Concerns

An overwhelming majority of association executives believe their members are experiencing difficulty managing the volume of information. This is true regardless of the association type, size, or its geographic scope.



Another information management issue that association executives report is creating widespread concern among members relates to evaluating which sources can be trusted to be reliable and/or relevant; almost half the executives surveyed identify this among the top three information management issues troubling their members.

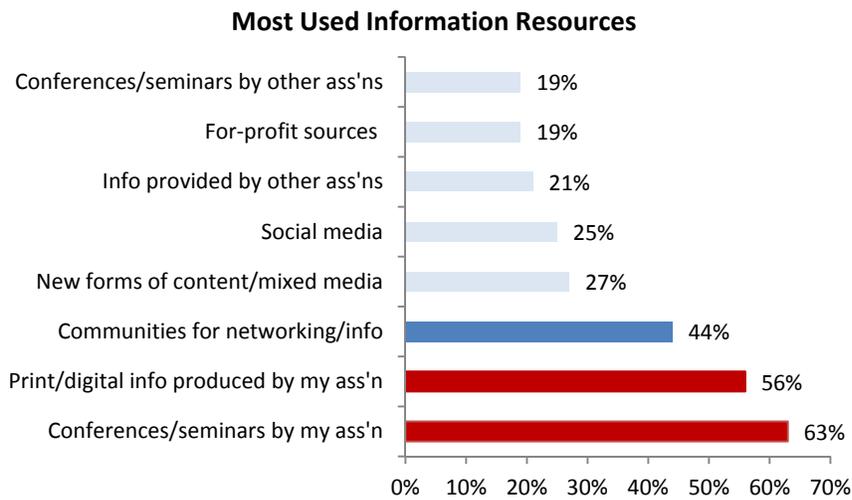
Of concern to fewer, but none the less a substantial percentage of association members, is deciphering which sources are most useful or relevant. In addition, executives report that more than one in three members are concerned about managing multiple information sources, keeping up with ever changing information technology, and locating the information that is relevant to addressing their specific problem or need.

Information Sources

To examine information issues more closely, the study investigated likely sources of information sought after by association members.

Executives anticipate that members will continue to rely on their associations as a primary source of information.

Seminars and conferences, as well as print and digital information resources produced and distributed by the association are the leading information dissemination tools. Communities and networks, which may or may not be affiliated with the association, are another important source of information.



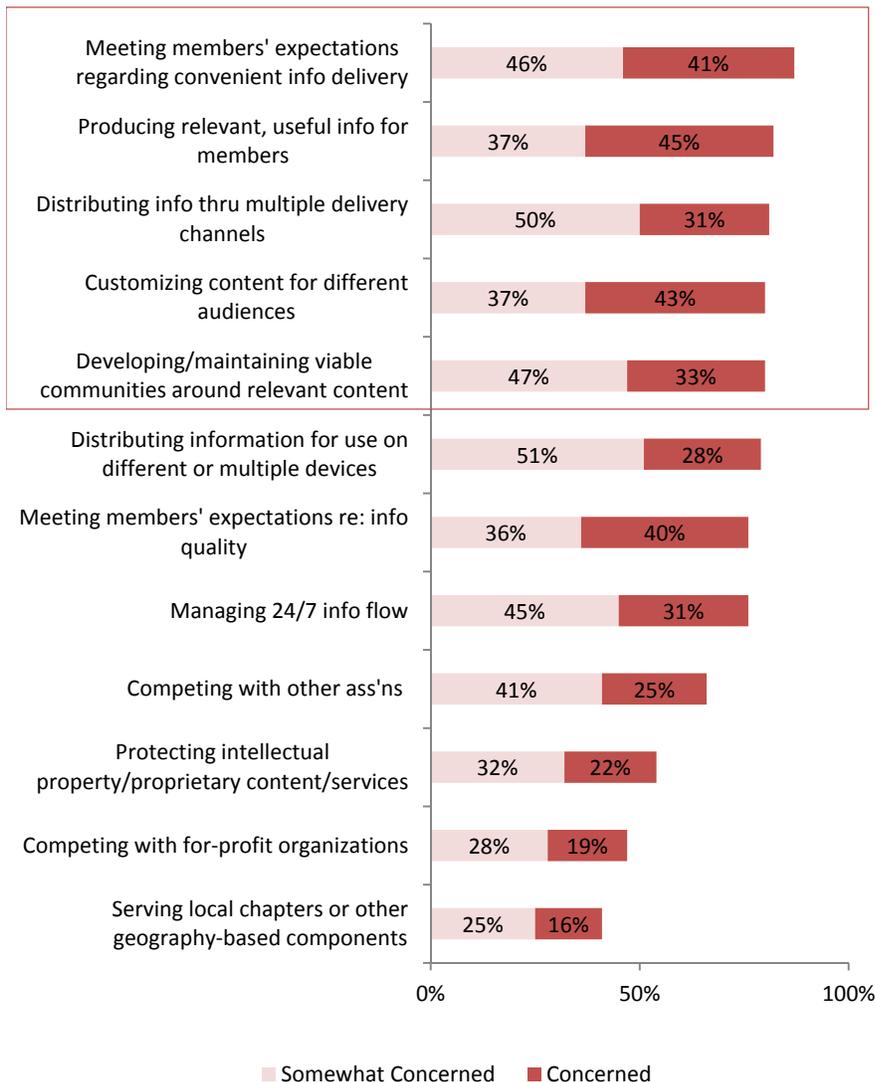
Association Laboratory concludes that associations will continue to be a primary resource in the near future for information management and information quality evaluation.

Impact on Associations

Based on the identified information management concerns, the study asked respondents to assess the implications of these concerns on association strategy.

Association executives are struggling to meet members' expectations for assistance in managing the volume of information.

Associations' Information Management Concerns



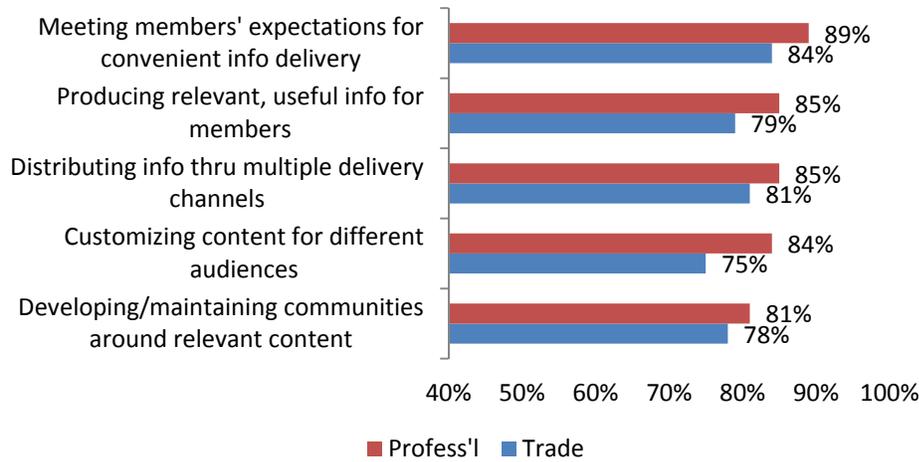
Nearly **9 in 10** association executives are either somewhat concerned or **concerned about the ability of their organization to meet members' expectations for delivering information in a convenient manner.**

Eight in 10 worry about their ability to produce relevant and useful information, customize the content to meet the needs of differing target audiences, and distribute it through multiple channels.

Developing and maintaining communities of interest around relevant content areas is troubling to an equal proportion.

Three-quarters of association executives report it is difficult to ensure the information their association delivers is relevant, of high quality and available in a timely manner.

Impact on Associations by Type



Among the information management issues that most impact associations, differences in perceived impact on trade and professional associations are relatively minor.

Associations have historically been information resources for their members. However, the exponential increase in information, including juried and non-juried sources, places a new burden on associations to help members avoid information overload.

Government Activity

Abstract

While both trade and professional association members are concerned about the rising costs of federal regulation and compliance, professional societies are also concerned that federal government budget reductions will impact government workers' participation in association programs. Association members are also worried about the potential for substantial policy change and, conversely, government policy deadlock.

Association members operate in an environment where state and/or federal government actions may have a substantive impact on their organizations or professions.

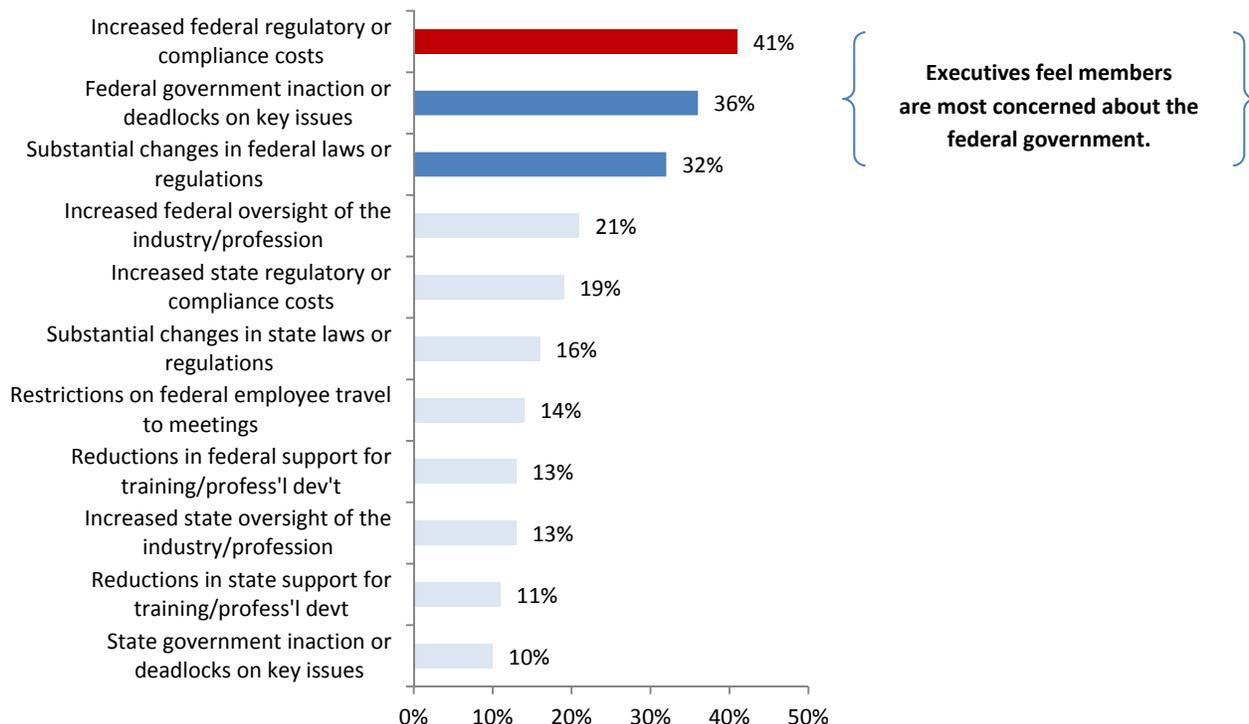
Association Laboratory concludes that government challenges, combined, with members' difficulties with information volume, will make it particularly difficult to ensure their industry's or profession's voice is heard.

Association Members' Concerns

Association executives report members are **most often concerned about increasing federal regulation and associated compliance costs** – four in ten indicate this is a concern. Government deadlock and the impact of changes in government laws and regulations are other issues of concern to at least one in three association members.

Federal inaction or deadlock on key issues is troubling to about one in three and equally concerning to members of both trade and professional associations – 38% and 37%, respectively. As might be expected, changes in state laws and regulations tend to be of higher concern to associations whose members are based in a single state than to those with broader geographic scope.

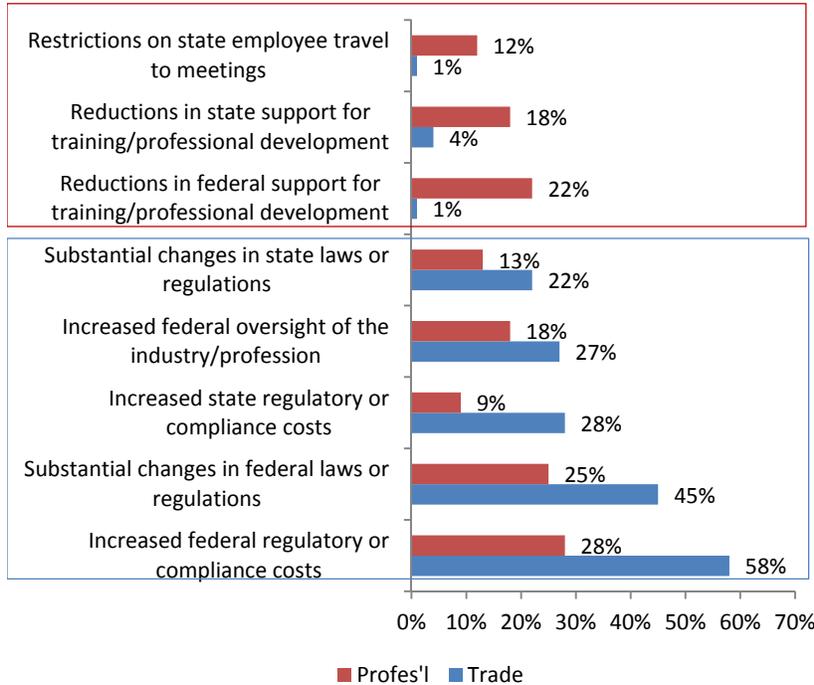
Members' Concerns About Government Actions



With such a high level of concern regarding federal activity, national associations will need to increase their ability to focus members' activity to be successful.

Overall, differences between trade and professional associations are greater with respect to concern for government actions than about information management.

Member Concerns by Type of Association



Initiatives that impose travel and/or educational restrictions on government employees are of concern to more professional association members than to trade association members.

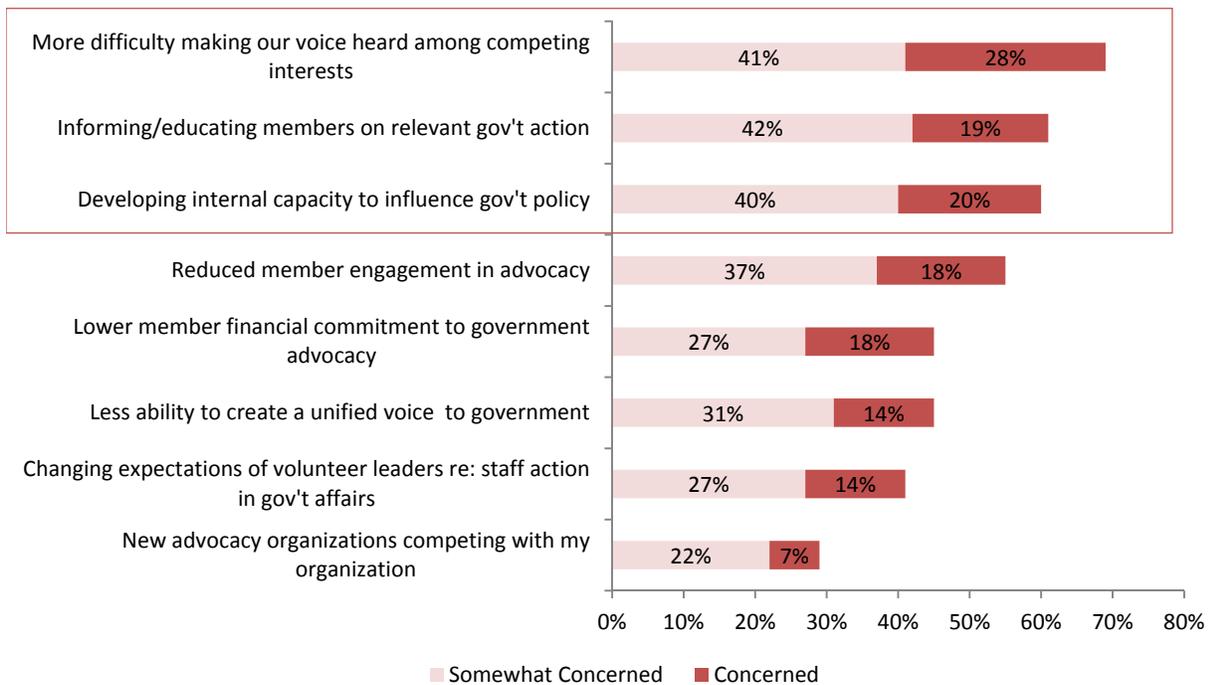
Many of the affected government employees are likely members of professional associations and these restrictions are pertinent to their professional development.

By contrast, changes in laws or regulations and increased regulatory/compliance costs are of much **greater concern among members of trade associations** than professional associations.

Impact on Associations

Association executives are most often concerned about their ability to be heard among the competing interests jockeying for attention, and their power to influence government policy, legislation, and regulation. This is a vital role for many associations and failure to deliver can disappoint or alienate a critical portion of the membership. It is of almost equal concern to executives at trade and professional associations (71% vs. 66%).

Impact of Government Activities on Associations



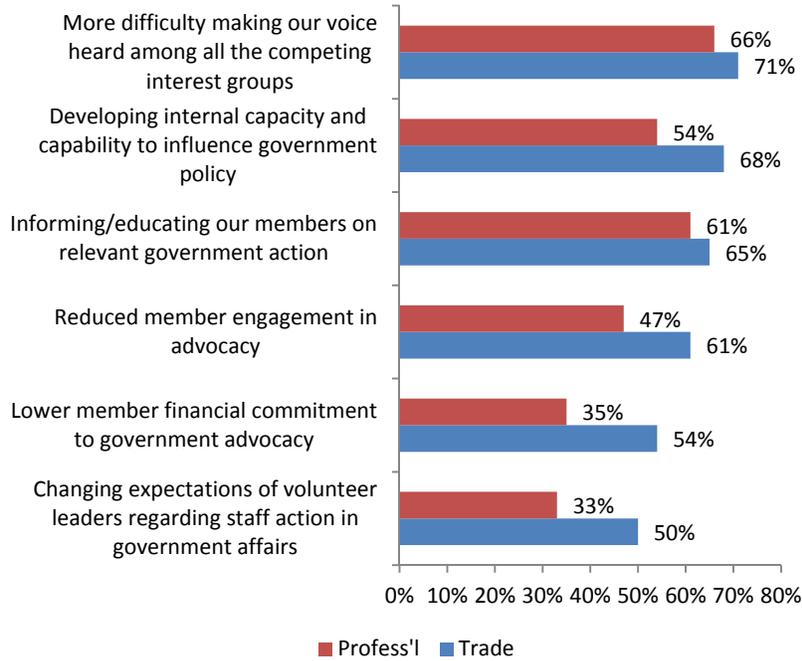
Professional societies are more focused on communication concerns such as informing or educating members.

Executives from trade associations are particularly concerned about member engagement and financial support, and developing the internal operations that might be necessary to make up for reduced member participation.

Trade association executives are more often concerned about developing internal capacity to influence government policies than their counterparts at professional associations (68% vs. 54%). Informing or educating members about relevant government actions is almost equally of concern to executives at trade and professional associations (65% vs. 61%).

Industry advocacy is an important function particularly for trade associations. However, six in ten trade association executives (61%) express at least some concern because it is becoming more difficult to engage members in this function and half are concerned because members are becoming less financially committed to advocacy (54%) and expectations for staff action in government affairs are changing (50%). These developments are likely to place a greater burden on trade associations in 2014.

Impact of Government Actions by Type of Association



Industry advocacy is an important trade association function. Today, trade associations are challenged to find new approaches for fostering a sense of community and assembling viable coalitions to influence government policy, legislation, and regulation. If they cannot engage members in this function or obtain financial commitment to it, their capacity to promote industry views will decline and membership may decrease.

Workforce Issues

Abstract

While association members are most concerned about their ability to identify, recruit, and retain qualified staff, association executives are most concerned about the ability of their members to attend or pay for professional development or related activities.

The changing nature of the workforce creates challenges for employers and workers, as well as for the associations who represent these businesses and employees.

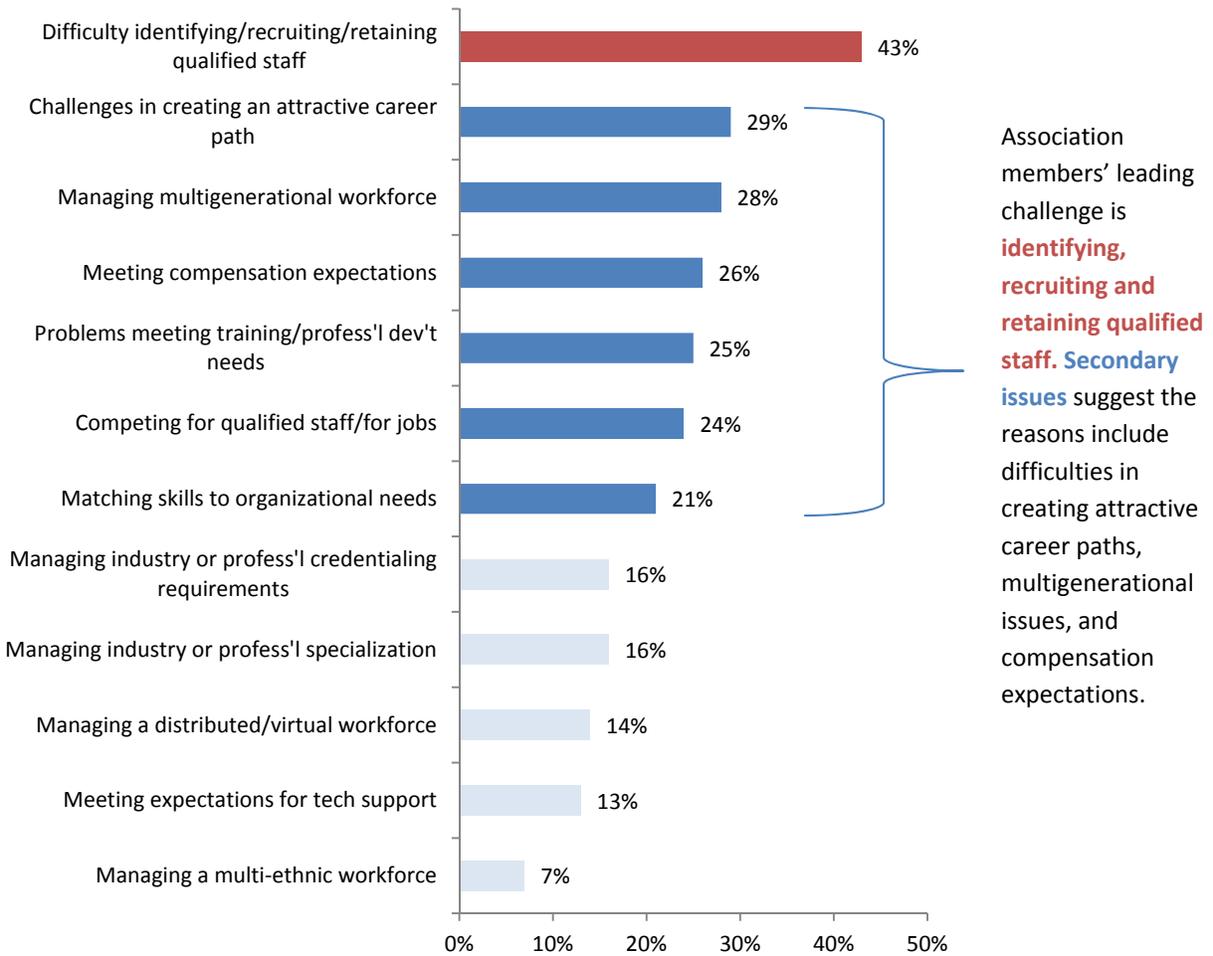
This section explores the issues of greatest concern to association members and how workforce trends are affecting associations.

Association Members' Concerns

More than four in ten association professionals indicate the **workforce issue most likely to affect their members in 2014 is identifying, recruiting, and retaining qualified personnel**. This is more often a problem for members of trade associations than for professional association members (59% vs. 34%). This outcome is not surprising, as trade associations represent employers who need to fill positions with the best qualified workers. State and regional associations report this issue affects more of their members than organizations with a wider geographic scope; this may be due to the smaller pool of qualified workers from which to draw in specific localities.

Workforce issues likely to impact about one-quarter of association members relate to ensuring workers' satisfaction with opportunities for advancement and compensation, managing a multigenerational workforce, and job or skill training. These issues are equally important to members of trade and professional associations, and there are no distinctions based on geographic scope.

Workforce Issues Impacting Members



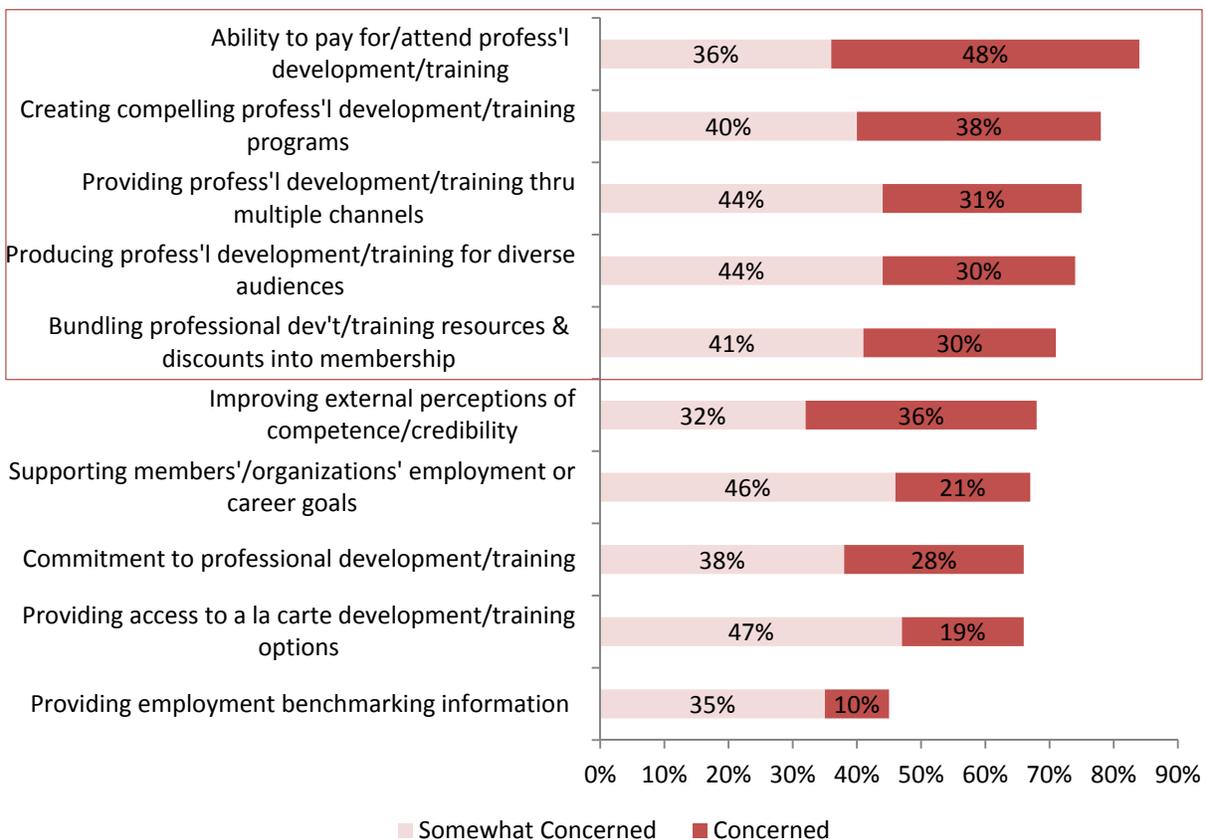
Impact on Associations

Ability to pay for and attend professional development and training is the workforce issue that will most impact associations. This will be equally vexing to both trade and professional associations (84% and 85%, respectively).

Four other issues, also highlighted in the graph below, are expected to affect at least seven in ten associations in 2014; all impact professional associations somewhat more often than trade associations:

- Creating compelling development and training programs (80% vs. 58%)
- Providing professional development/training through multiple delivery channels (80% vs. 72%)
- Producing development and training for diverse audiences (79% vs. 70%)
- Bundling development and training resources or discounts into the membership offer (77% vs. 67%)

Impact of Workforce Issues on Associations



Attendance at training and development conferences and seminars is an important revenue source for many associations; threats to this revenue stream may place finances in jeopardy. Therefore, it is ironic that difficulty paying for training and development programs will have the greatest impact on associations even though the greatest workforce problem facing members is finding and retaining qualified personnel.

This paradox highlights the need to devise cost-effective delivery mechanisms for skills training. Large, national conferences and training seminars may need to be offset by online offerings, such as self-paced learning programs and webinars. These tools make training more affordable and require less time away from the workplace.

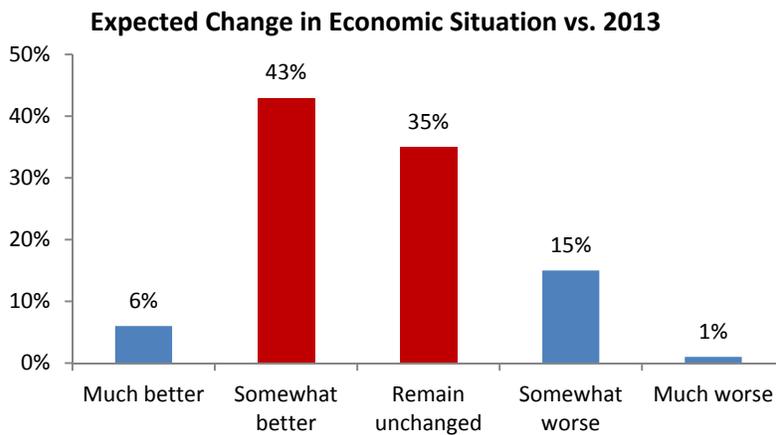
Economic Conditions

Abstract

Executives are cautiously optimistic about the economic circumstances of their members, with executives representing trade associations most enthusiastic. Professional societies are more concerned about government budget cuts impacting their members' economic prospects. Trade associations anticipate more mergers. The result will lower member engagement and participation.

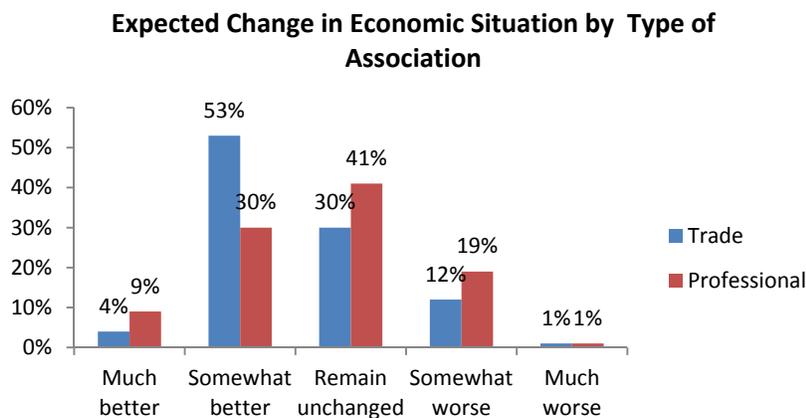
The economy has a substantial impact on associations and their members. This section covers perceptions about the general direction of the economy, specific economic factors of concern to members, and potential implications on associations.

Two-thirds of association executives expect the **economic situation for their members will be the same or better in 2014 than in the prior year**. Fewer than two in ten foresee a worsening of economic conditions.



About half of respondents believe the economic situation facing their members will improve; a substantial percent believe the economy will remain unchanged or even worsen.

Executives from trade associations are more optimistic.



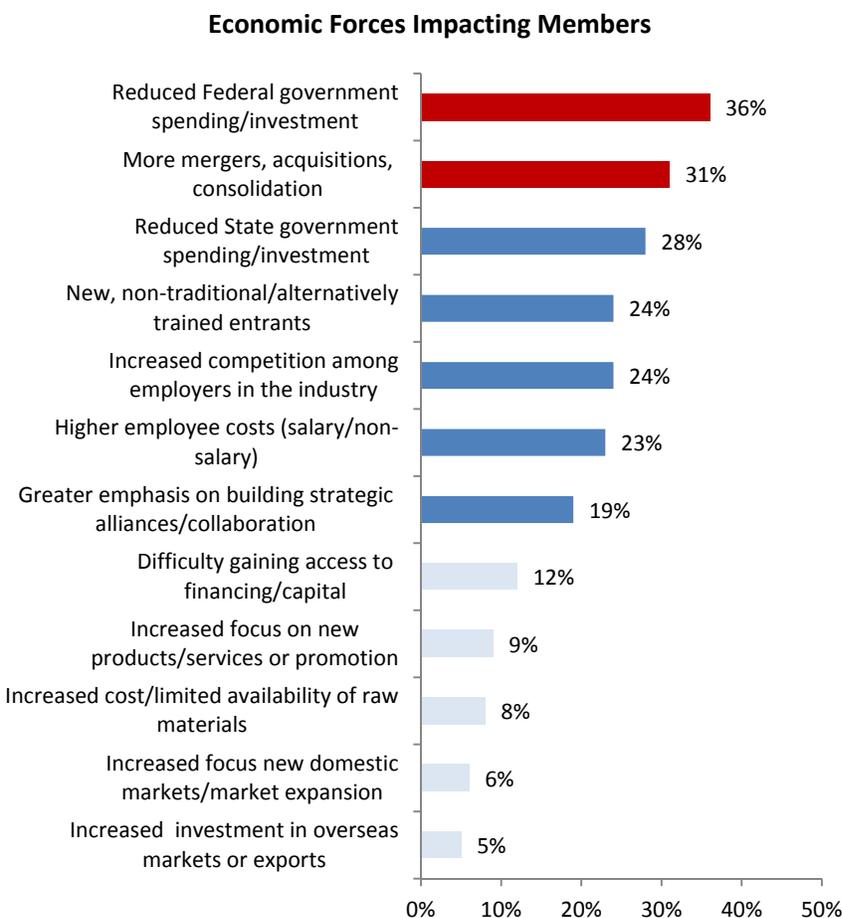
Association Members' Concerns

Association executives expect reduced federal spending and an uptick in mergers and acquisitions will have the most impact on members in 2014.

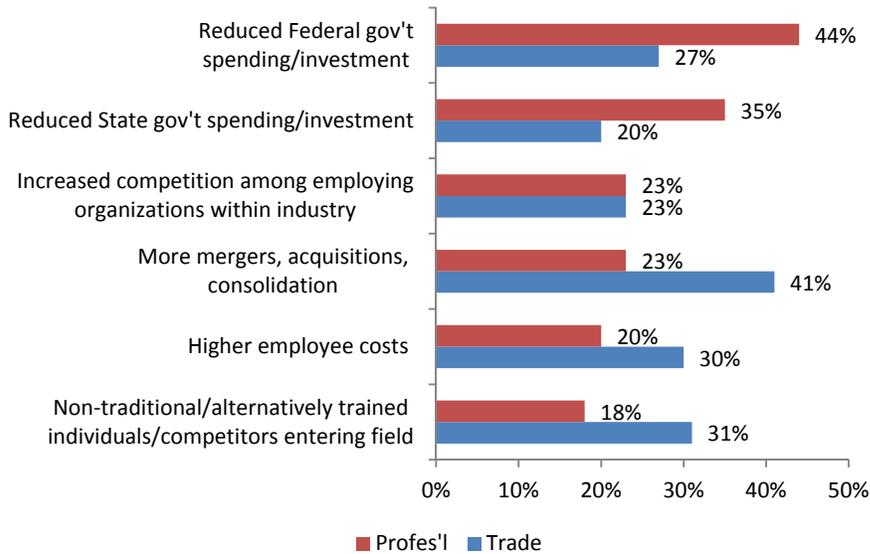
Professional association executives express more concern than trade association executives about the effect of reduced federal (44% vs. 27%) and state government spending (35% vs. 20%) on their members.

The opposite relationship exists with respect to increased merger and acquisition activity (41% for trade vs. 23% for professional associations), greater competition from non-traditional sources and alternatively trained workers (31% vs. 18%), and increases in employee expenses (30% vs. 20%).

The geographic scope of an association influences expectations about how economic forces will affect association members. As might be expected, executives who manage associations focused solely on the United States are more likely to indicate reductions in federal spending will affect their members than executives with either a broader or narrower geographic focus. Executives from associations with the broadest geographic scope are most likely to anticipate that mergers, acquisitions and/or consolidation will impact their members (41%).



Members' Economic Concerns by Type of Association



The different level of concern between executives from trade vs. professional associations regarding federal and state investment is very evident.

Given their membership and product mix, government employees are a substantial source of members for professional societies, more so than for trade associations.

In addition to the items listed in the survey, respondents were allowed to identify other economic forces that would impact their members; 5% indicate implementation of the *Affordable Care Act* will have an economic impact on their members.

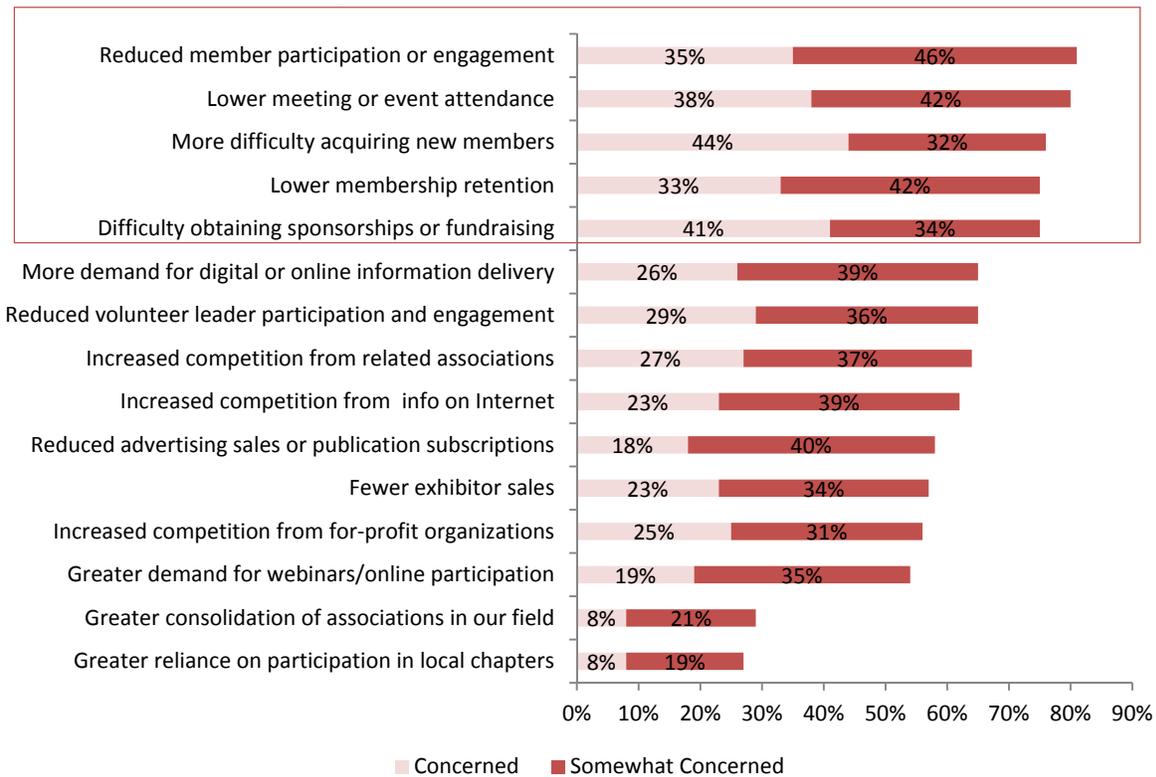
Impact on Associations

At least **three in four association executives predict negative consequences for their organization as a result of economic forces**. Chief among them are

- Reduced member engagement
- Greater difficulty acquiring new members and retaining current ones
- More problems fundraising and securing sponsorships

Trade association executives foresee more negative impact from reduced member engagement than their professional association counterparts (92% vs. 75%). Difficulties with fundraising and sponsorships are anticipated by slightly more professional than trade association executives (77% vs. 69%). Trade and professional association executives are equally likely to predict substantial impact from the other economic forces in the top five.

Impact of Economic Conditions on Associations



Economic conditions have been especially challenging world-wide over the past five years; thus, it is not surprising association executives are concerned. Although these administrators predict stable to improved economic conditions for 2014, the fiscal outlook for associations remains murky. Consumers and businesses, having been burned by the severe recession, are taking a cautious approach to spending and associations are experiencing the effects. The effects of an improving world economy, if it materializes, may not be seen in the association world until 2015 or later.

Consumers have modified buying behavior and internalized various adaptive behaviors such as thrift shopping culture, a reliance on credit and openness to collaborative consumption. The motto of this year's congress of Germany's protestant church, "As much as you need," emphasizes today's less consumerist point of view. Many formally free-spending emerging market consumers are also more price-sensitive.¹

Economic growth will strengthen in 2014, averaging 2.6% to 2.7% for the year, with the second half registering stronger quarterly gains than the first. The gains will come as business and consumer confidence strengthens and Europe begins to emerge from its 18-month recession, brightening overseas sales prospects. Growth will remain restrained by continued government deficit reduction, however.²

¹ Daphne Kasriel-Alexander. Top 10 Global Consumer Trends for 2014. Euromonitor International

² David Payne, "Kiplinger's Economic Outlooks" January 13, 2014. <http://www.kiplinger.com/tool/business/T019-S000-kiplinger-s-economic-outlooks/>

Globalization

Abstract

As the geographic scope of the association becomes more limited, concern regarding global issues decreases. From those who operate globally, threats due to economic conditions in other countries and adverse effects of global competition are the **global factors most likely to negatively impact association members.**

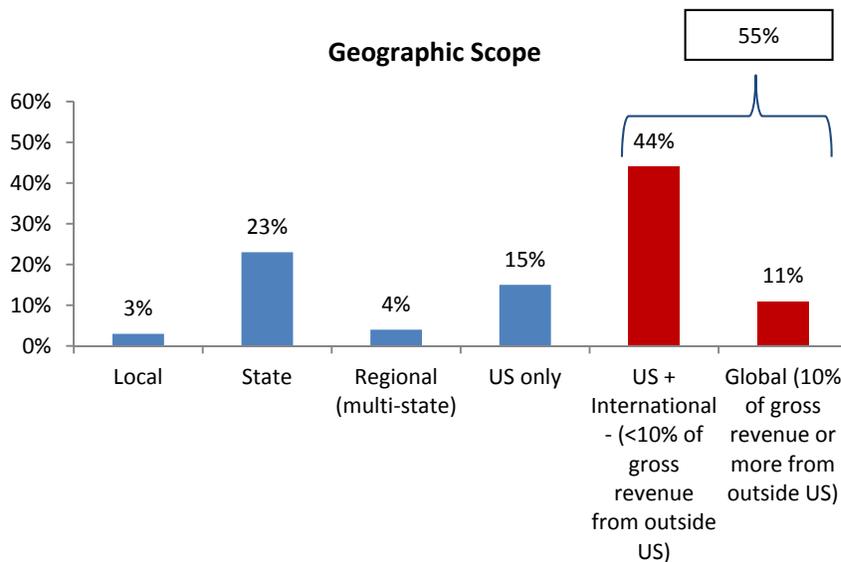
Respondents are most concerned about educating members on global activities and developing collaborative activities such as developing or maintaining partnerships.

As many businesses now operate in a global environment, associations are heading in this direction, as well. With increasing globalization, money, people, opportunities, and competitors flow relatively freely across geographic borders.

Based on previous research **Association Laboratory continues to suggest** that all associations, regardless of scope, are impacted by the forces of globalization and that this impact needs to be considered in association strategy.

Association Members' Concerns

Over half the association executives in the *Looking Forward 2014* sample report their organization receives at least some revenue from outside the United States.



55% of respondents indicate some level of global activity; the other 45% indicate they do not operate outside of the U.S. in any fashion.

Associations recognize that global conditions impact their members and need to be addressed. In 2012, participants in *Looking Forward* believed that associations would need to consider the implications of global activity more seriously. By 2013, participants clearly believed that associations of all sizes were operating in a global system and that association professionals needed to take this global system into account. This is even more the case as associations look to 2014. Nevertheless, fewer association executives consider globalization a concern of their members than the other strategic factors examined in this research.

Global Forces Impacting Members



Only one-third of the association professionals in Association Laboratory's most recent *Looking Forward* survey do not perceive their members are concerned about any global forces tested. This response comes largely from executives whose associations have a more limited geographic scope (local, state, regional, or U.S. only).

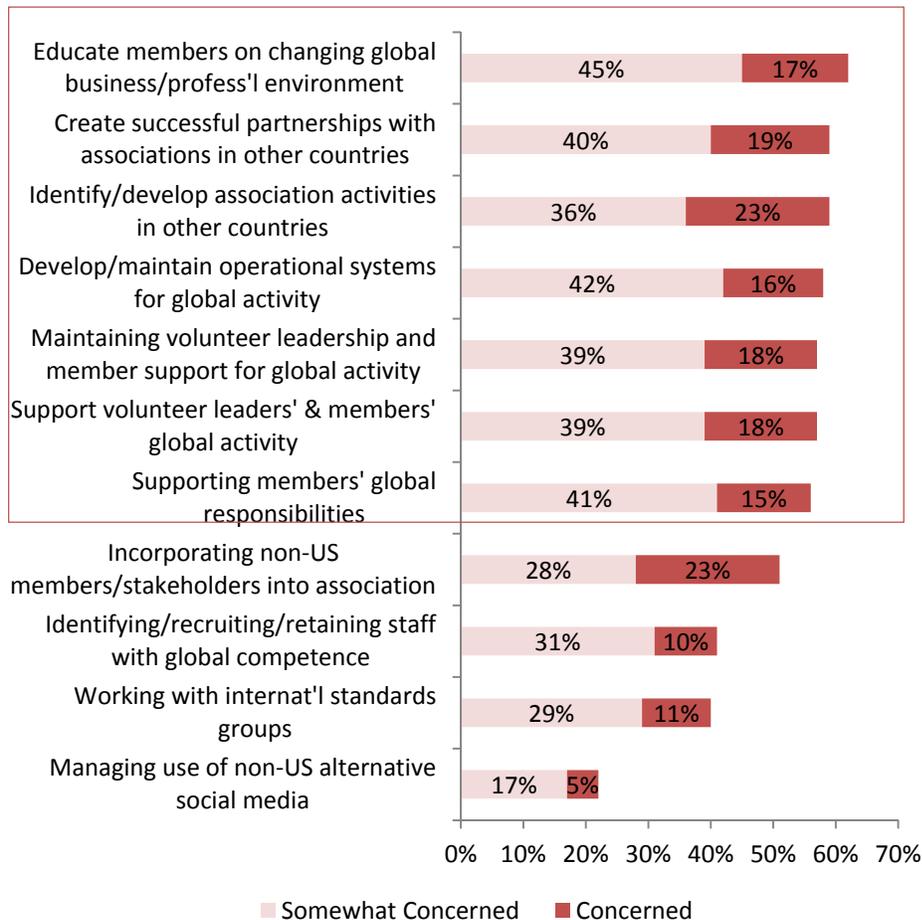
Threats due to economic conditions in other countries and adverse effects of global competition are the global factors most likely to negatively impact association members. More than one in ten respondents report members' own international activities, challenges associated with managing a multicultural, global workforce, and opportunities afforded by economic conditions in other countries also will affect their members.

Impact on Associations

Association executives need to help both their own organization and their members cope with the impacts of globalization. Over half the association executives indicate they are at least somewhat concerned about ensuring successful international operations for their own organizations. Approximately the same proportion is concerned about supporting members in understanding the global environment and meeting their increasingly global responsibilities.

Association executives believe many globalization issues, including the first four on the graph and incorporating non-U.S. members, are more challenging for professional associations than for trade associations.

Impact of Globalization on Associations



The effects of globalization are not felt equally by all associations.

Associations with the broadest geographic focus are addressing more challenges associated with globalization, and are affected by more global forces than associations with a targeted geographic focus. Similarly, executives at professional associations more often indicate globalization is affecting their organizations than trade association managers.

As the effects of globalization become more widespread, these issues will increase in importance to association members. More associations will need to address the pressures global forces exert on their members, their members' organizations, and long-term association strategy. It behooves those associations not yet feeling the impact to prepare their membership and their organizational infrastructure to accommodate this eventuality.

Appendix 1: Methodology

Methodology

The *Looking Forward* series represents a continuing effort by Association Laboratory to investigate and track the strategic forces in the macro business environment with the greatest impact on association strategy and structure.

Initial efforts in 2012 and 2013 focused on identifying the overarching themes impacting the association industry and profession and developing initial hypotheses regarding strategic implications on association strategy.

In 2014, Association Laboratory explored quantitative testing of the initial environmental factors and corresponding implications.

To develop *Looking Forward 2014*, Association Laboratory conducted the following research activities and analysis:

1. Review of association qualitative and quantitative research conducted by Association Laboratory during 2012 and 2013, specifically activities related to environmental scanning, strategic planning, and membership value.
2. Creation of an online survey designed to test perceptions about the importance of various strategic forces to association members and to identify how the forces are affecting association management.
3. Data collection throughout November and December 2013, with invitations sent to a list of association executives; participation also was solicited through social media. The result was completion of the survey by 195 association management professionals.
4. Analysis of the data with a focus on identifying similarities and differences based on type of association and geographic scope. Although differences by size of association (as defined by membership size and revenue) were also noticed, they are not reported because these variables so closely correspond to membership type and geographic focus.

Future efforts will focus on refining the list of environmental factors and developing more focused descriptions of strategic impact and tracking changes in these areas over time.

Appendix 2: About Association Laboratory

Principal Authors

Looking Forward 2014 Principal Authors

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Dean West is one of the nation's most recognized experts on association strategy. He is a former association CEO and has served as Chairman of the ASAE Professional Development Council and as a member of the ASAE Membership Council. He is also a former member of the Board of Directors of the Association Forum of Chicagoland.	Carol Wolinsky is an award-winning senior executive researcher with more than 25 years' experience leading integrated research projects for corporations and trade and professional associations.	Cecilia Sepp is a nationally recognized expert in association management. Ms. Sepp is a current faculty member of the ASAE Association Management Week certificate program, and a former faculty member of the online program ASAE University. She has served as Chair of the ASAE Communication Section Council, and is currently serving on the ASAE Component Relations Council. Ms. Sepp is a member of the Content Creation Committee of Association Media & Publishing.

About Association Laboratory

Association Laboratory is one of the nation's leading strategic consulting firms specializing in the research and development of business strategy for associations. The award-winning company serves a national client base of leading trade and professional associations through staff in Chicago, IL, and Washington, DC.

The company produces a variety of strategic white papers on issues related to association business strategy. More information on the company can be found at www.associationlaboratory.com.