



Association Laboratory Inc.

25 YEARS HELPING ASSOCIATIONS MAKE BETTER DECISIONS

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***Executive Summary and Discussion Guide***  
***Looking Forward<sup>®</sup> Impact 2026***

# Contents

- Letter from the President ..... 3
- The Association Laboratory Research Alliance ..... 4
- Thanks to Our Strategic Partners ..... 5
  - CE21 ..... 5
- The Issues Facing Association Members ..... 6
  - Global Issues ..... 9
  - Economic Circumstances ..... 10
  - Competition ..... 11
  - Sources of Association Competition ..... 13
- Closing ..... 14
- Appendix 1: Methodology ..... 15
- Appendix 2: About Association Laboratory ..... 16
- Appendix 3: Discussion Guide ..... 17
  - Introduction ..... 17
  - Overview: Leading the Futures Discussion ..... 18
  - How to Use This Discussion Guide ..... 19
    - Section 1: Preparing for a Futures Discussion Meeting ..... 19
    - Section 2: Onsite Discussion Steps & Supporting Materials ..... 22



## Letter from the President

As Association Laboratory celebrates its 27<sup>th</sup> year in business, we are proud to provide an executive summary of the 15<sup>th</sup> annual edition of Looking Forward<sup>®</sup> Impact, the leading environmental scan of the association strategy environment, and the first of three yearly studies in the Looking Forward<sup>®</sup> series for 2026.

This year, the name of the game is uncertainty. **82% of CEOs cite “general economic pressures and financial uncertainty”** as a factor affecting members. When members are uncertain about the future, they are less likely to invest or allocate resources to discretionary activities.

Increasingly, associations are viewed as optional. Competition for education, advocacy, and community is increasing, particularly by for-profit organizations. The relationship between associations and policymakers is shifting. Employers are less supportive of association engagement. Artificial intelligence (AI) and its impact are growing across professions and industries.

Association CEOs and Board members need to quickly examine how their association is a solution to uncertainty, not an optional expense. The more an association is an expense, not an investment, the less likely people and companies are to see associations as a relevant platform for their success.

As the Association Laboratory reviewed the data, several key themes emerged.

- **Environmental Volatility Has Shifted from Episodic to Structural** - economic uncertainty, policy unpredictability, and workforce disruption are no longer cyclical shocks but persistent conditions.
- **Technology Has Shifted from a Tool to an Essential Pillar** – without an integrated technology infrastructure, the necessary customization and adaptation to a changing world becomes impossible.
- **Competitive Boundaries Are Blurring Across Member Markets** - respondents report pressure from existing competitors, new market entrants, and substitute products/services, indicating an erosion of traditional industry or professional boundaries.
- **Workforce Disruption Is Affecting Both Members and Associations Simultaneously** - severe recruiting and retention challenges and difficulty creating attractive career paths are reported across member industries.
- **Trust, Reputation, and Narrative Control Are Becoming Critical Assets** - inaccurate public representations of member industries/professions indicate reputational exposure beyond traditional advocacy channels.

Association volunteer leaders continue to operate within poorly informed governance systems ill-suited to a fast-paced, dynamic world. The result? Too many associations will struggle to succeed in an environment characterized by rapid change and intense competition.

We will continue our commitment to providing the information, insights, and opportunities you need to thoughtfully consider your future and develop strategies to achieve your professional and organizational success. If I or my team can ever assist, don't hesitate to contact us. We look forward to working with you.



Dean West, FASAE  
President and Founder  
Association Laboratory Inc.



# The Association Laboratory Research Alliance



Association Laboratory is proud to be the founder and leader of the Association Laboratory Research Alliance®.

The Association Laboratory Research Alliance® is a collaboration of more than 20 state, national, specialty, and global societies of association executives designed to investigate, lead the discussion of, and provide insight into the future of the association business model.

Since its inception, the Association Laboratory Research Alliance® has investigated the forces shaping association members and the implications of these forces on association strategy. Through research reports, articles, white papers, and virtual and in-person seminars, the Alliance provides the latest, most relevant, and most helpful information for association leaders on the future of associations. The Association Laboratory Research Alliance® produces three sector studies under the Looking Forward® banner critical to association sector thought leadership.

- **Looking Forward® Impact** – This global environmental scan of the association strategy environment identifies the factors with the most significant impact on association members.
- **Looking Forward® Challenges** – This study looks at the challenges that the changing environment creates for association strategy.
- **Looking Forward® Solutions** – This study assesses more than 135 different strategies and solutions and identifies the ones that association leaders believe are important to success, given the changes in the member environment.



# Thanks to Our Strategic Partners

## CE21

CE21 is a cloud-based technology and services company providing a full-service Learning Management System (LMS) that delivers distance education, online registration, and physical product sales solutions.

The company serves professional education verticals, including Legal, Accounting, Health Care, Insurance, Business, Education Content Providers, Professional & Trade Associations, and Non-Profit Organizations.

Association Laboratory uses CE21's LMS system to give us more capacity and capability to provide leading-edge content to association leaders. You can see the system in action at the [Association Laboratory's Knowledge Center](#).

CE21's award-winning LMS can help your organization deliver a best-in-class e-learning experience explicitly designed for your most important customers –learners.

Built for today but designed with the flexibility to meet tomorrow's changing needs, CE21 provides an elegant, mobile-optimized online learning environment that transforms your organization into a 24/7 on-demand value provider.

For more information, visit [CE21.com](https://ce21.com).



# The Issues Facing Association Members

Looking Forward® Impact 2026 assessed more than 60 factors affecting association members within six domains. The chart identifies, in descending order, the factors selected by at least 30% of respondents in 2026. Percentages are shown for the current year (2026).

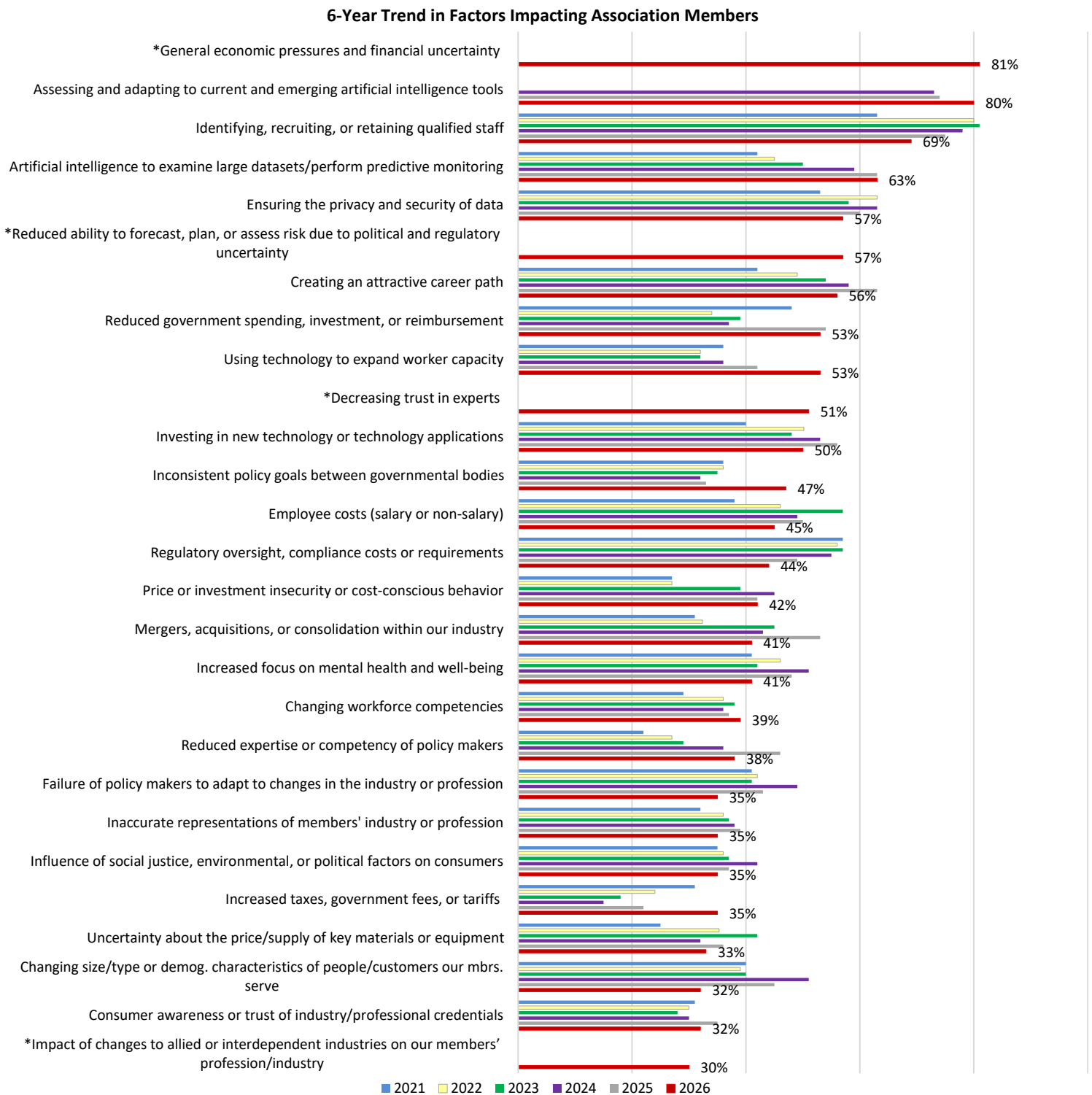


FIGURE 1 LOOKING FORWARD IMPACT

\*= new option for 2026

In addition, trade and professional respondents were presented with some unique issues facing their members, worded to reflect their unique perspectives. The following are responses from professional and trade association respondents for unique issues affecting their respondent group.

### Factors Specific to Professional Societies

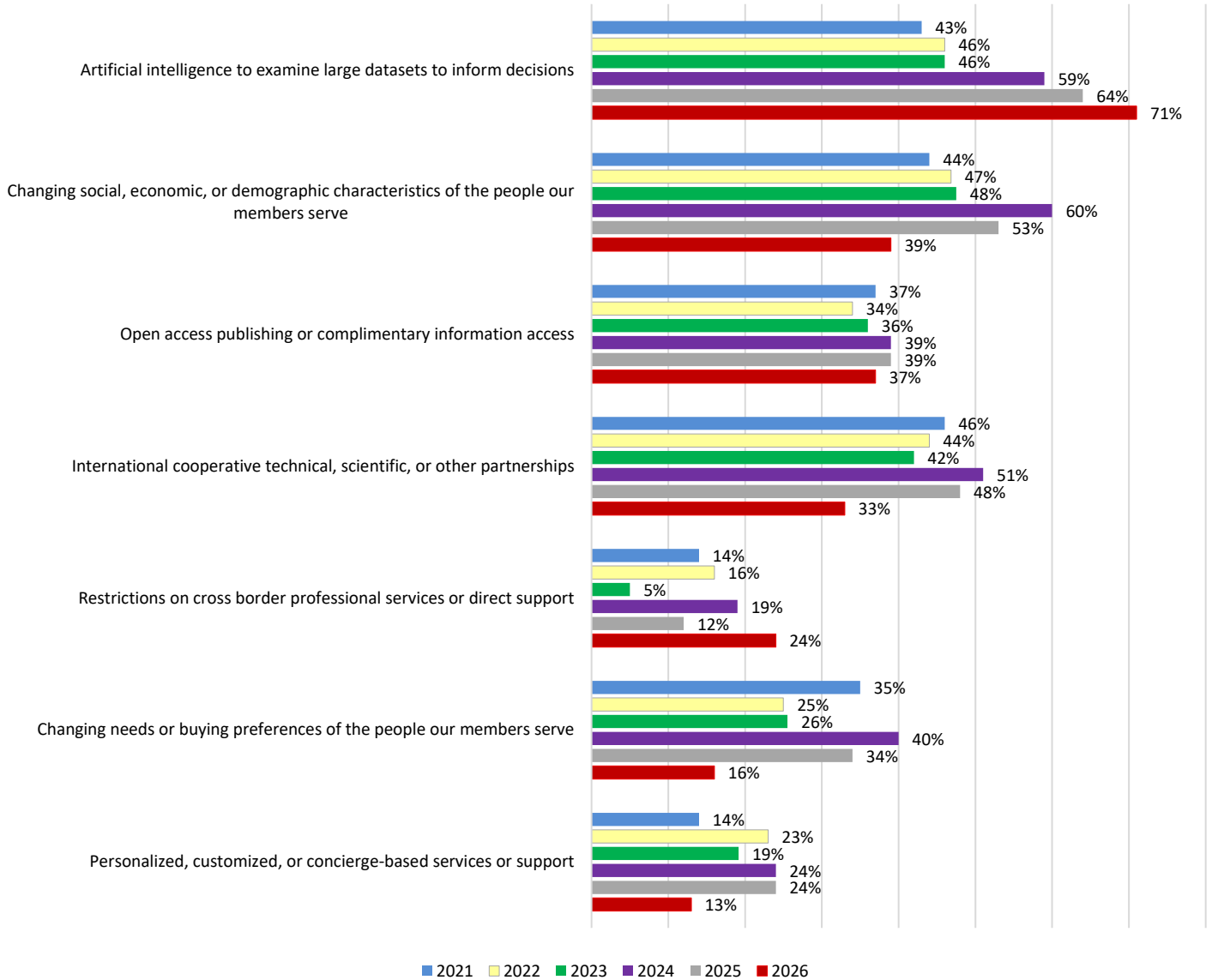


FIGURE 2 LOOKING FORWARD IMPACT

### Factors Specific to Trade Associations

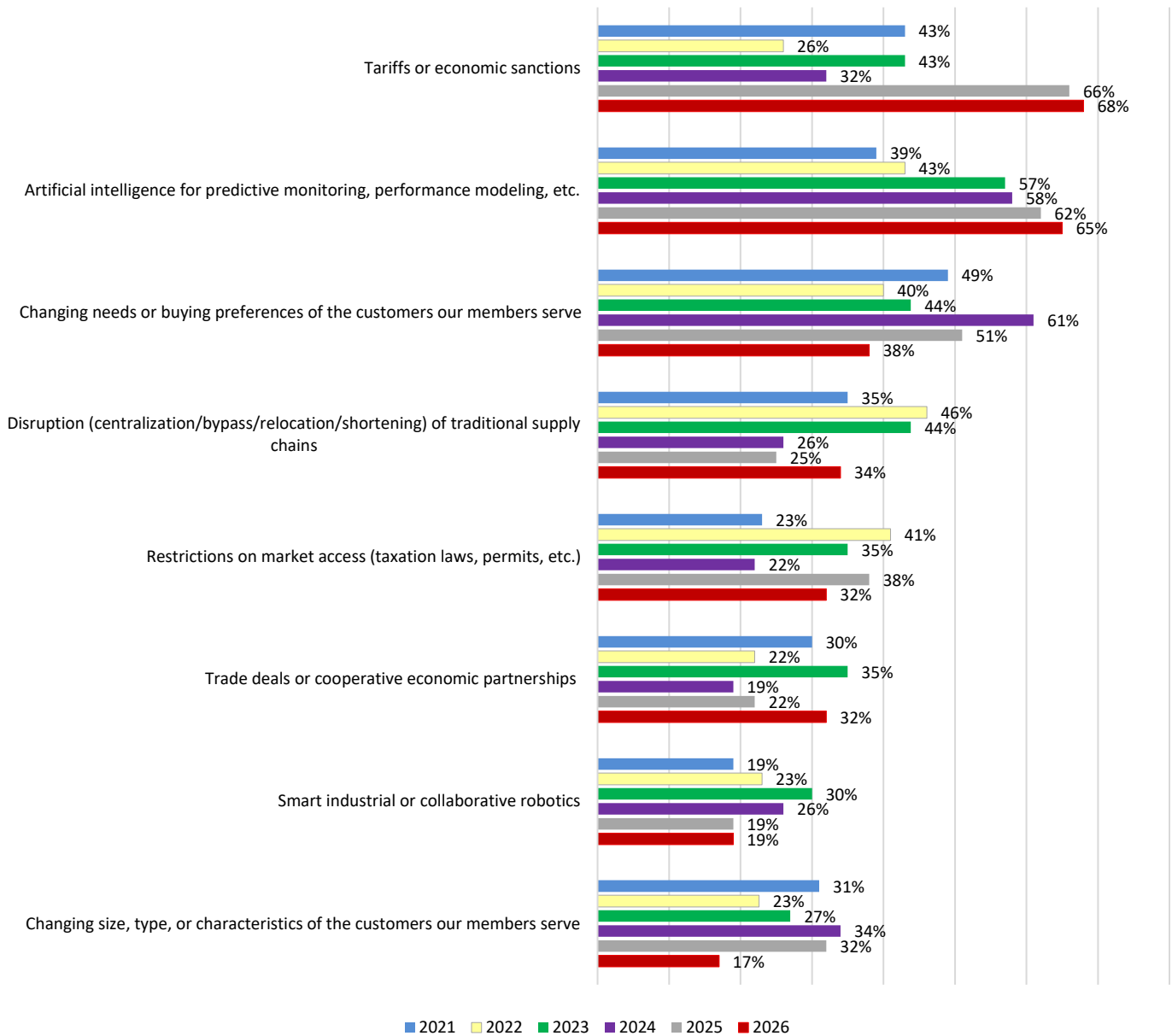


FIGURE 3 LOOKING FORWARD IMPACT

# Global Issues

The study assessed several\* different issues impacting members of associations with non-U.S. activity. The chart below identifies the factors impacting respondents from associations with a multi-country scope:

The Issues Impacting Members of Global or International Associations

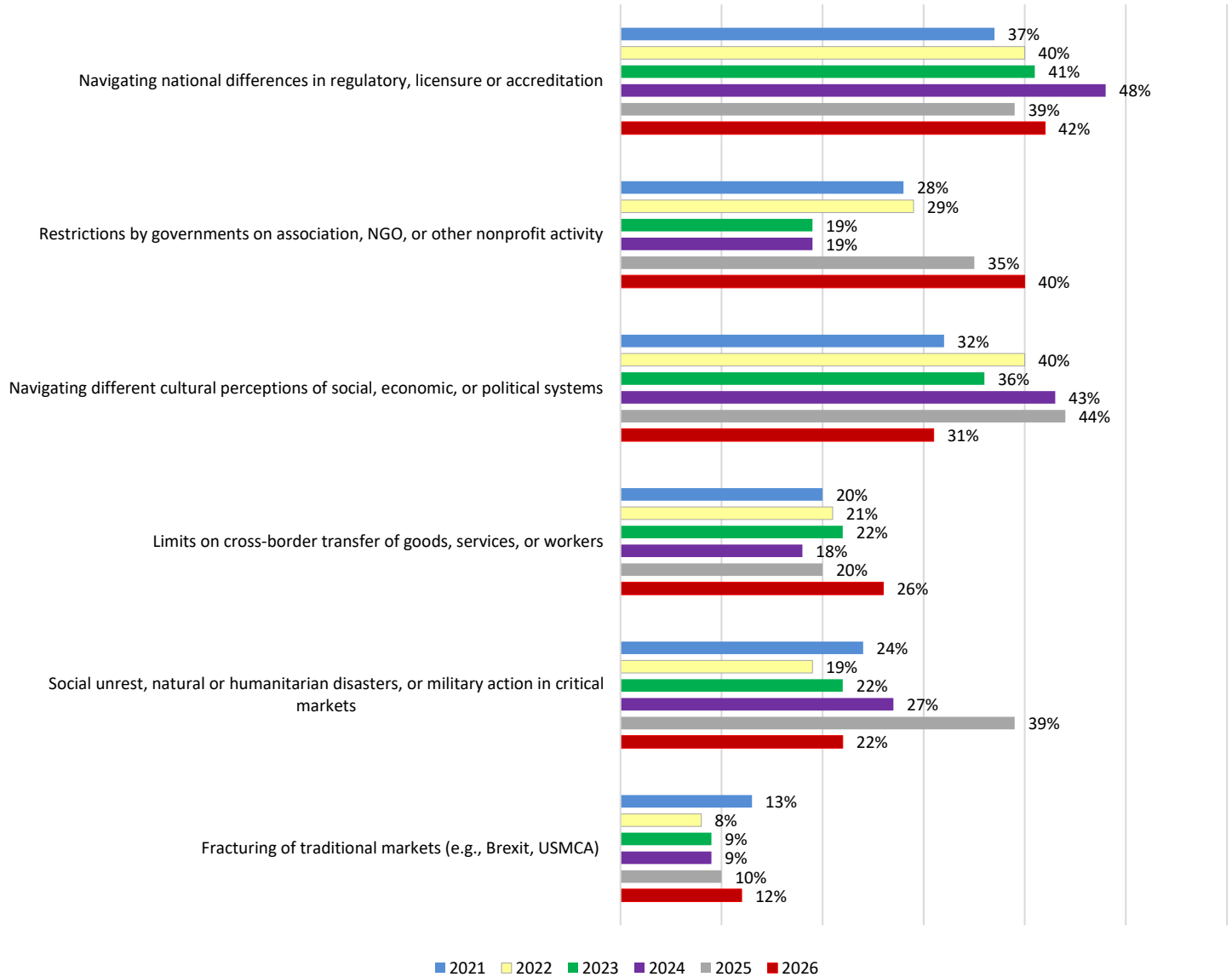


FIGURE 4 LOOKING FORWARD IMPACT

Question text: Which of the following will have the most impact on your members over the next three years? Select up to five.  
 (Global, US+International, and Multi-Country Federation [non-US] respondents only)

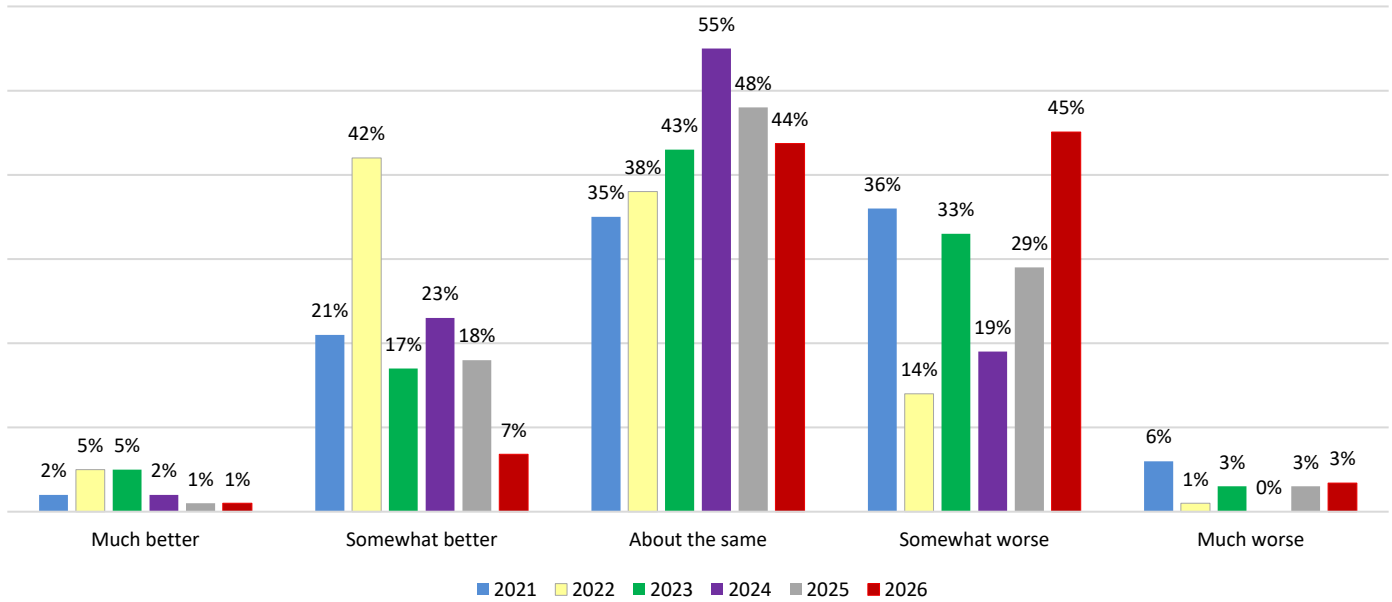
\*There were 11 total Global issues tested. Figure 4 shows the six issues that were shown to all Global/International association respondents. For the remaining five options, the wording was modified to address the perspective of a trade or professional association respondent – these responses are included in the preceding Trade and Professional-specific charts (Figures 2 & 3).

## Economic Circumstances

In 2014, Association Laboratory’s sector research on behalf of the ASAE Foundation identified a link between the economic circumstances facing members and member organizations and their likelihood of engagement with the association.

Historically, the more economic hardship association members face, the less likely they were to engage with an association. In Looking Forward® Impact, we asked respondents to identify the anticipated economic circumstances of their members during the upcoming year.

Change in Anticipated Economic Conditions Facing Members Over the Next 12 Months



**FIGURE 5 LOOKING FORWARD IMPACT**  
*Question text: What will be the economic situation facing your members over the next 12 months?*

Respondents are more pessimistic about the economy in 2026 than they were in any other year since 2021.

In 2026, just 8% of respondents anticipate a more favorable economic climate for their members, down from 19% in 2025. Meanwhile, 48% of respondents anticipate worse economic conditions in 2026, up from 32% in 2025.

This is a significant increase in negative sentiment about the economy in the coming year, continuing a trend from 2024.

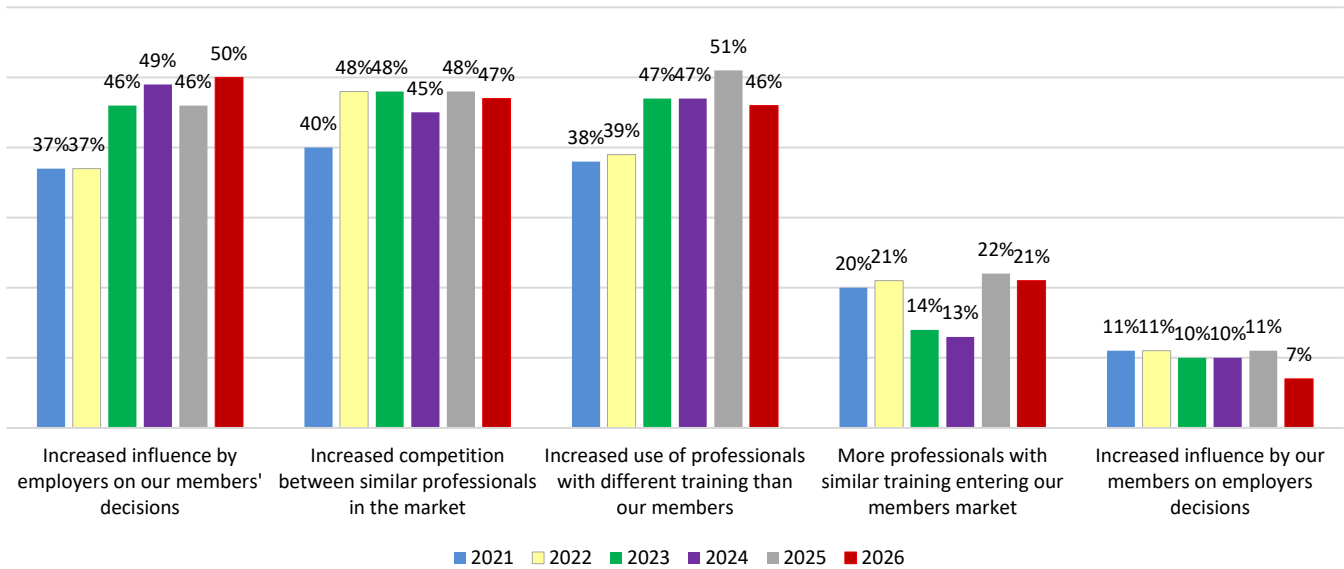
# Competition

Looking Forward® Impact has identified competition as a significant factor impacting association members. Using [Porter’s Five Forces](#) as a frame of reference, the study assessed the types of competition with the most substantial influence. Porter’s Five Forces can be summarized as:

1. Existing competitors
2. Threat of new entrants
3. Threat of substitutions
4. Increasing buyer power
5. Increasing supplier power

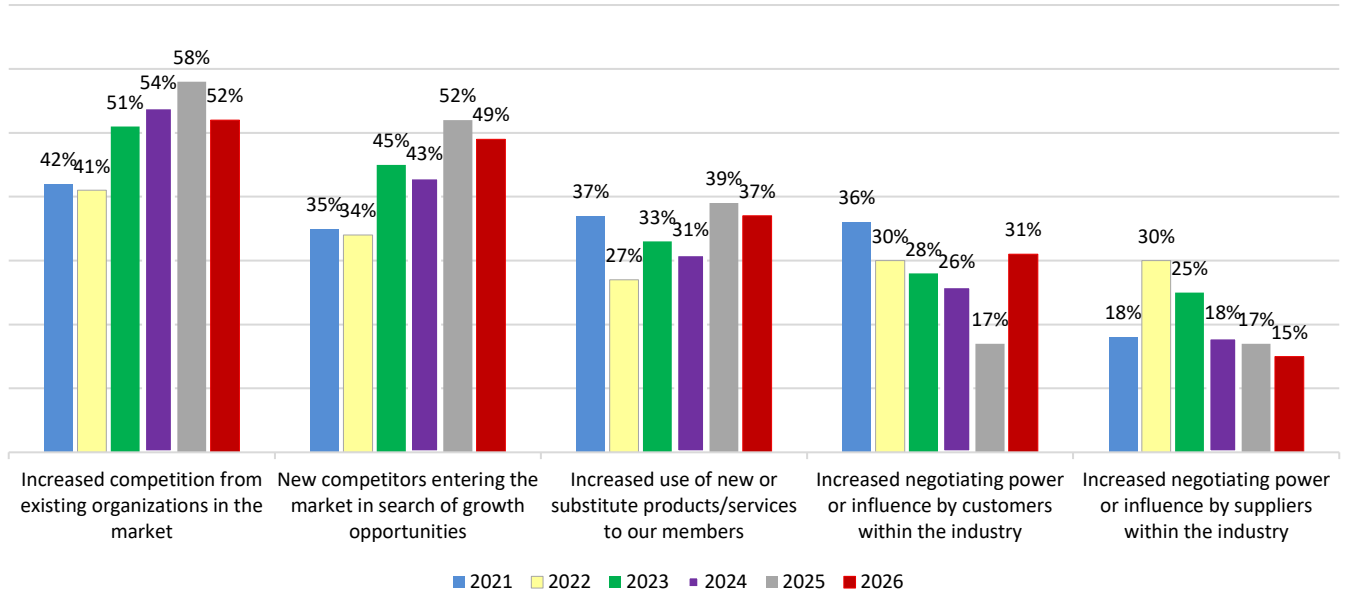
The graphs below identify trade and professional association respondents’ perceptions of whether these competitive factors will impact their members. Question wording was adjusted to reflect the unique perspective of each audience:

Competitive Landscape - Professional Societies



**FIGURE 6 LOOKING FORWARD IMPACT**  
*Question text: Your members operate in a highly competitive environment. Which of the following will have the most impact on your members over the next three years? Select up to three.*  
 (Professional association respondents only)

Competitive Landscape - Trade Associations

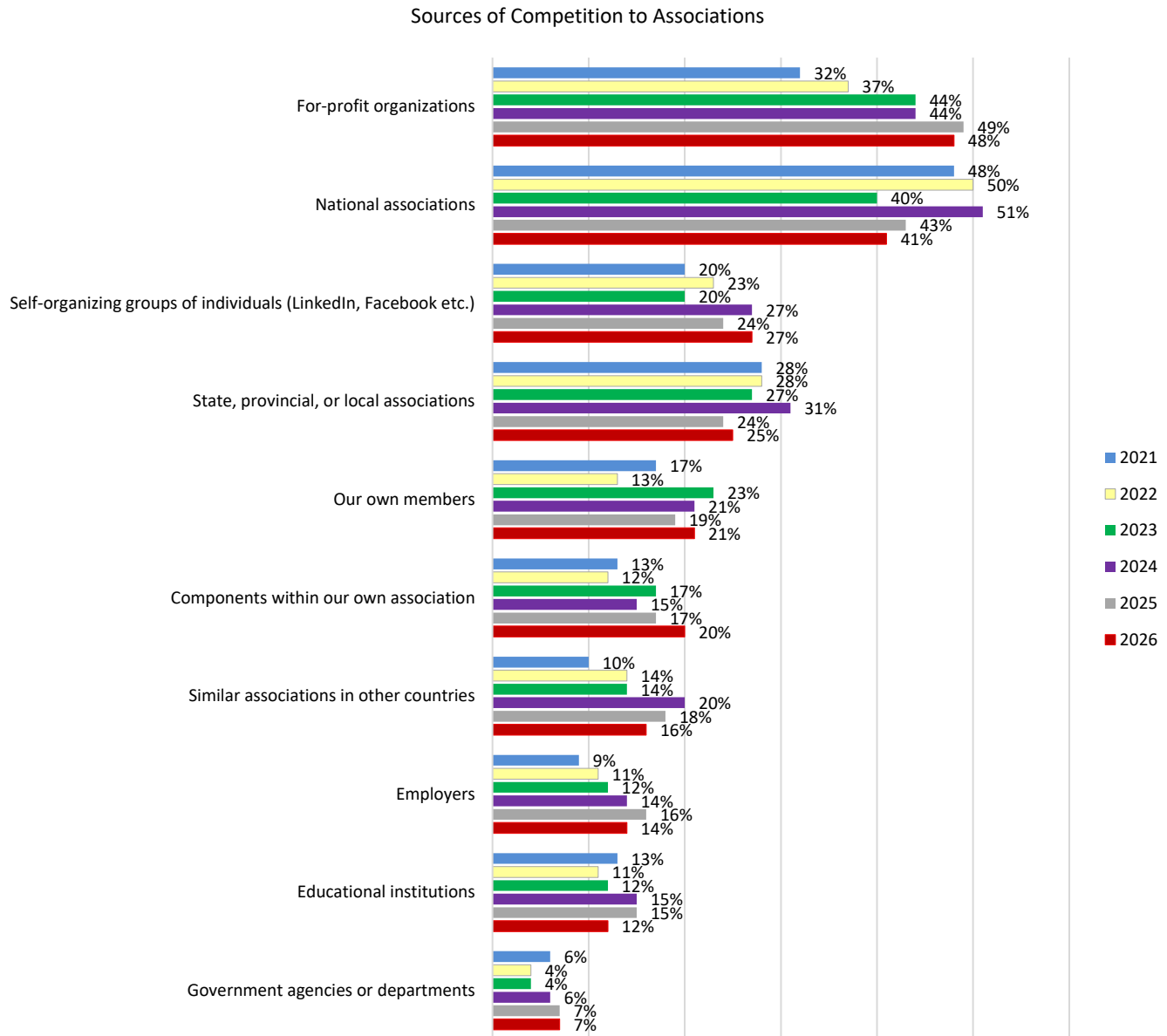


**FIGURE 7 LOOKING FORWARD IMPACT**

*Question text: Your members operate in a highly competitive environment. Which of the following will have the most impact on your members over the next three years? Select up to three.*  
 (Trade association respondents only)

# Sources of Association Competition

Associations operate in a highly competitive environment. The following chart identifies the anticipated sources of competition to association products, services, and initiatives.



**FIGURE 8 LOOKING FORWARD IMPACT**  
*Question Text: What are the top three sources of competition for your association? Select up to three.*

In a highly competitive environment, it will be essential for associations to clearly define who they serve, understand their needs, and develop a competitively differentiated value proposition.

In addition, it will be critical to establish business processes to monitor and adapt this value proposition to the changing needs of the market and the environment in which it operates.

## Closing

It is becoming clear that associations continue to struggle with the changing world in which they must succeed.

Strategies that do not anticipate these market changes will suffer as a result.

Too many associations are structured around historical assumptions, trying to be successful in a world that has changed so dramatically that these assumptions are obsolete.

Associations that invest in market knowledge, create business processes to make effective decisions, and strategically differentiate themselves from competitors are more likely to be successful.

As a new generation of volunteer leaders and executives assumes leadership roles, we will have tools, resources, and opportunities like never before.

Over the next 10 years, we will determine whether our executive ability is sufficient to sustain the association sector's prosperity.

Please get in touch with Association Laboratory if you believe we can help in any way.

Good luck.

# Appendix 1: Methodology

Looking Forward® Impact provides an ongoing picture of the forces influencing members' professional and business environment and the implications on association strategy and the association business model.

Association Laboratory developed and deployed an online survey directly and via collaboration with the company's Research Alliance partners. Data collection occurred from November 2025 through January 2026.

Response options for Looking Forward® Impact 2026 were initially informed by qualitative research conducted in 2021 involving executives from the Association Laboratory Research Alliance membership, combined with the Association Laboratory's extensive experience with environmental scanning on behalf of clients representing a wide range of professions and industries.

The study assesses factors affecting the association environment in six domains:

- **Economic Factors** — issues regarding the financial and competitive outlook of association members' industry or profession.
- **Information & Technology Factors** — issues regarding the technology and communications underpinning industry and professional activity.
- **Workforce Factors** — issues regarding the movement, engagement, and competencies of workers in association members' industries or professions.
- **Government Factors** — issues regarding the relationship between association members and local, state, and federal governments.
- **Global Factors** — issues regarding relationships between individuals, companies, and governments across international boundaries.
- **Uncertainty and Adaptation Factors** — issues regarding association members' psychological outlook and response to rapid and unpredictable change.

For each domain, participants were shown a list of issues and asked to select up to five that would most impact the members of their association over the next three years:

*"Which of the following will have the most impact on your members over the next three years? Select up to five."*

The survey also collected information, including:

- Changes in the competitive landscape and sources of competition
- General economic outlook for members

A total of 206 individuals took part in the survey.

## Appendix 2: About Association Laboratory

### **Your Leadership Asset** - Helping Associations Make Better Decisions in Complex Environments

Association Laboratory is an award-winning research and strategy consulting firm dedicated exclusively to the needs of trade and professional associations. Founded in 1999, the firm works with national and international organizations operating in complex, volunteer-led environments where strategic clarity, member engagement, and public trust are essential to success.

With offices in Washington, DC, and Chicago, IL, Association Laboratory is recognized globally for its deep expertise in associations that function as knowledge authorities, standards-setters, education providers, and conveners of the professional community.

### **Decisions and Strategy Backed by Research**

Association Laboratory specializes in turning complex strategy into practical, evidence-based action. Its work is grounded in both qualitative and quantitative research and designed to support associations across the full lifecycle of strategy—from insight gathering to implementation.

### **A Modern Approach to Member Insight**

Association Laboratory's **Authentic Voice of the Member Program** is a continuous research solution that replaces episodic surveys with a structured, year-round approach to understanding member needs. The result is a clear, always-on picture of what matters to members, what's changing, what's working, and where opportunity lies—supported by strategic guidance tailored for staff and volunteer leadership.

### **Global Perspective. Local Relevance.**

Association Laboratory routinely conducts research across global markets. It brings the voices of practitioners, academic leaders, industry partners, and other stakeholders into strategy discussions—producing insights that reflect market diversity while supporting enterprise-level decisions.

### **Evidence-Based. Volunteer-Centric. Transparent.**

Association Laboratory's approach is distinguished by:

- Research designed around real decisions, not abstract data
- Iterative strategy development that engages stakeholders along the way
- Neutral, structured facilitation that supports informed consensus
- Transparency in methods and findings to support Board-level decision-making

### **Thought Leadership for the Sector**

Association Laboratory is also the publisher of Looking Forward®, the longest-running environmental scan of the association sector. This research, based on interviews with hundreds of association CEOs and senior staff, helps leaders understand the evolving landscape of association strategy, membership, governance, and related areas.

**Association Laboratory helps CEOs lead with clarity, act with confidence, and build strategies that earn adoption—not just approval.** To learn more, visit: [www.associationlaboratory.com](http://www.associationlaboratory.com)

# Appendix 3: Discussion Guide

## Introduction

Without understanding the future in which your members live and work, developing a successful, sustainable, long-term strategy is impossible.

Therefore, forward-looking leaders must be prepared to **foster and lead engaging conversations about the future.**

This **Looking Forward® Impact 2026 Discussion Guide** is designed to help you lead a productive conversation about the future of your industry or profession. A companion piece to the Looking Forward® Impact Executive Summary, it enables you to identify, deepen understanding, and reach consensus on three essential questions:

1. *What environmental factors have the greatest impact on your members?* – Identify the issues with the most impact on your members and the decisions they will be making over the next three years.
2. *What are the **implications of these factors** for your association’s strategy?* – Assess the impact of evolving member decision-making on the future strategies of the association. *How should the association **act on this information?*** – Determine what the association needs to strengthen, evolve, or reduce to be more successful, given these implications.

By using the Looking Forward® Impact 2026 Discussion Guide, you will arrive at a research-based, consensus understanding of the future of your industry or profession and the implications for your association’s strategy.

### Consider the following.

In 2016, the Harvard Business Review published a study of 30,000 publicly listed companies over a 40-year span that reached a striking conclusion:

“Companies are dying at a faster rate than ever before.”

The reasons, according to the research:

“Organizations are dying younger because they are failing to adapt to the growing complexity of their environment.”<sup>1</sup>

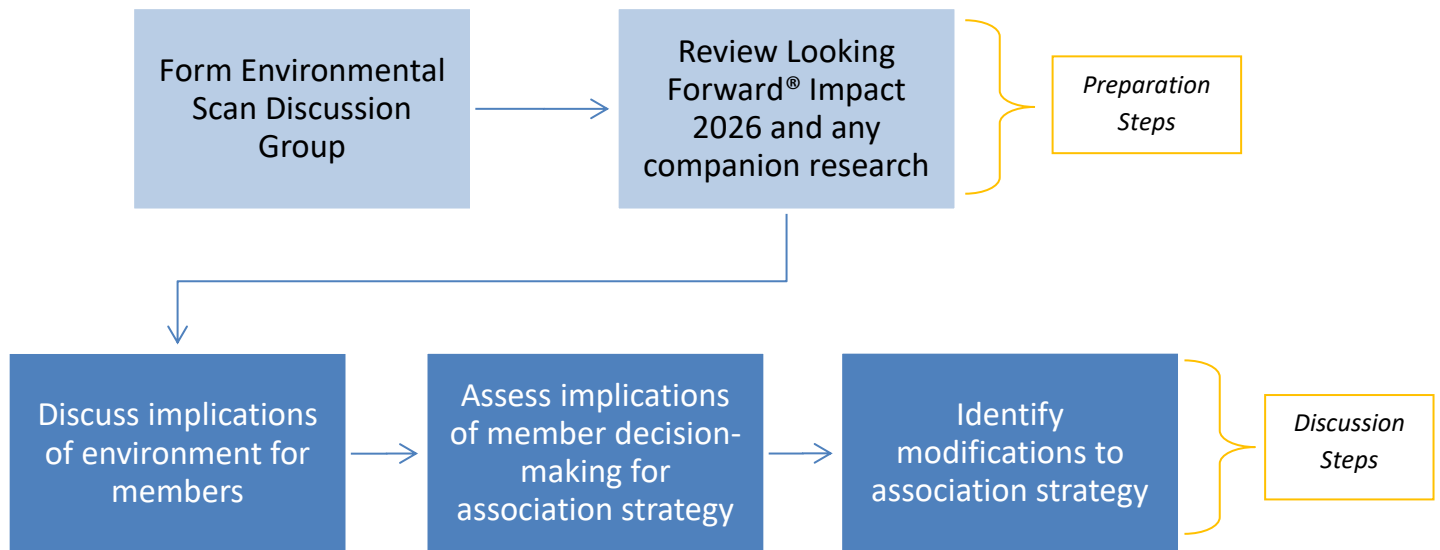
The tools in your **Looking Forward® Discussion Guide** will help prepare you and your volunteer leaders to adapt to an uncertain future, and to continue advancing your Mission and serving your members and other stakeholders.

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<sup>1</sup> The Biology of Corporate Survival, Harvard Business Review Jan/Feb 2016

## Overview: Leading the Futures Discussion

The futures discussion process involves a series of iterative steps that lead to consensus on the factors most significantly impacting your members and the corresponding association strategy. The process affects the following key steps:



These steps provide a structured process for reviewing, understanding, and applying data-driven, future-focused knowledge to your association's strategy.

# How to Use This Discussion Guide

The following sections will guide you through creating a productive futures discussion within your organization.

**Section 1** provides information on creating the discussion group, reviewing the research, and tips for successful facilitation.

**Section 2** provides a sample agenda for a full-day meeting and participant worksheets to be used during the meeting to facilitate discussion and reach consensus on critical issues.

## Section 1: Preparing for a Futures Discussion Meeting

The following steps will help you create an influential discussion group and guide the preparation and setup of a productive futures discussion meeting.

### Create an Environmental Scan Discussion Group

Assemble a group of 8–12 people to participate in the discussion.

This group can consist of staff only, volunteer leaders only, or some appropriate combination based on your association's culture. You can also include external subject matter experts.

The participants in your discussion should meet the following criteria:

- **Intellectual Diversity** – Participants should represent a diversity of perspectives and opinions regarding the association, its activities, and its members.
- **Association Commitment** – Participants should be critical to the long-term successful implementation of strategies designed to address the issues identified in the discussion, and they should be willing to take the time to participate fully in discussions and, if necessary, post-discussion follow-up.
- **Personal Capability and Capacity** – Participants should have the intellectual curiosity and willingness to think strategically about the future of their industry, profession, and association.

### *Advice and Tips*

There is no perfect group. Don't worry about precision.

The group size should be sufficient to have diverse perspectives without creating extensive logistical expenses or hassle.

In Association Laboratory's experience, the group should be no less than eight people and no more than 12 people.

## Organize an Environmental Scan Discussion Meeting

Identify a one-day timeframe to organize the group to discuss and decide on the changing environment facing your members and the implications for your association's strategy.

You will need space for 8–12 people to meet. In addition, you will require sufficient space for 2–3 small break-out groups and their corresponding discussions.

### *Advice and Tips*

It is essential to have a quiet, reflective environment without the daily distractions of work. Consider an off-site meeting venue or another location that enables robust conversations.

## Conduct a Pre-Meeting Review of the Goals, Process, and Research

Before the meeting, provide Looking Forward® 2026 and any other research or information you believe is valuable to participants, and organize a 90-minute webinar or meeting to orient individuals to the onsite discussions.

This advanced webinar or meeting aims to address any questions about the goals, process, or data prior to discussions on-site. This improves the efficiency of on-site interactions by reducing the time required for administrative, logistical, or process-related discussions.

Agenda items include the following:

- Introduction of participants
- Review of the logistics, agenda, and process for the onsite discussions
- Presentation of the data from Looking Forward® Impact and any other relevant research
- Answer questions regarding the data, process, or other issues

Following this webinar, participants should be prepared to discuss the issues onsite without extensive additional orientation.

## Organize Small Groups and Leaders for Onsite Discussions

The following are vital steps guiding the onsite discussions. Modify as you see fit, given your needs and resource constraints.

### Create small discussion groups:

Once your participants have been recruited, divide the participants into smaller subgroups, each with a small group leader (more about leaders below).

Small discussion groups make participation easier because many people interact more productively in small groups.

In addition, when separate small groups consider the same question or issue independently and simultaneously and come to the same conclusion, it creates **organic consensus**.

Each group should be approximately the same size, and the makeup of each group should represent the diversity of participants and perspectives.

### Designate a moderator:

The moderator is responsible for acting as a resource on the process for each small group and, if necessary, helping address any challenges that may occur with the discussion. The moderator can also act as an independent or objective voice.

### Designate a leader for each small group:

Small group leaders are responsible for keeping the participants on task, ensuring the groups are finished within the designated time, and organizing the small group's report to the larger group.

### *Advice and Tips*

The following are tips to improve the productivity of your discussions based on the Association Laboratory's experience facilitating staff and leadership retreats.

- Abide by the following **standards of conduct** throughout the process:
  - Participants are to discuss and decide issues with the association's best interests in mind.
  - Participants are not "representing" a department, constituency, or organization.
  - Participants should participate in an objective, open, and honest manner.
- **Be patient** – Keep the conversation high-level, and don't rush ahead. Develop understanding before conclusions and develop conclusions before recommendations.
- **Be open** – If you disagree with someone, explore why. Do you have different definitions of terms? Do you have different perspectives on the issue? Do you have other priorities or goals?
- **Be trusting** – Trust the process, but don't sacrifice outcomes on behalf of the process. If you need to adjust the agenda or explore an unplanned question, do so. But do so with intent and try to stay within the basic parameters of the process.
- **Be fearless** – Don't be afraid to ask difficult or nontraditional questions. Questions lead to understanding and unique perspectives.

## Section 2: Onsite Discussion Steps & Supporting Materials

### Template Agenda for a One-Day Meeting

The following outlines a potential agenda for a one-day meeting.

Association Laboratory believes that one full day of discussions allows for sufficient consideration of the issues without taking undue time or logistical expense. This agenda may be modified onsite to ensure enough time is devoted to important topics.

| Time              | Activity  | Description   |
|-------------------|---|---|
| 8:00– 8:15 am     | <b>Welcome</b>  |   |
| 8:15 am           | <b>Call to Order</b>  |   |
| 8:15 am – 8:30 am | Overview of Agenda and Process  |   |
| 8:30 – 8:40 am    | <b>Individual Reflection</b><br><br><u>Question 1:</u> Given the information in <i>Looking Forward® Impact 2026</i> , supplementary association research, and our experiences with members, what are the <b>top three issues</b> with the most impact on our members? | Participants complete Question 1 of the Looking Forward® Worksheet independently, identifying the top three issues impacting members.<br><br>Afterwards, allow 5 minutes to break into small groups.            |
| 8:45 – 9:45 am    | <b>Small Group Discussion</b>   | Each small group reviews the individual responses of the other participants in their group and agrees on the top three issues impacting members.  |
| 9:45– 10:00 am    | <b>Coffee Break</b>   |   |
| 10:00–10:30 am    | <b>Large Group Discussion</b>   | Each small group presents its top three issues to the full group. The moderator identifies common themes among the problems.  |
| 10:30–10:40 am    | <b>Individual Reflection</b><br><br><u>Question 2:</u> Given the identified thematic issues facing our members and considering the data in <i>Looking Forward® Impact 2026</i> , what are the <b>implications for the future</b> of our association and its strategy? | Participants complete Question 2 of the Looking Forward® Worksheet on their own, identifying the top three implications for association strategy.<br><br>Afterward, allow 5 minutes to break into small groups. |

|  |  |  |
|--|--|--|
| 10:45–11:45 am                                       | <b>Small Group Discussion</b>  | Each small group reviews the other participants' responses and agrees on the top three implications for the association and its strategy.  |
| 11:45–12:00 Noon<br>Noon – 12:30 pm<br>12:30–1:00 pm | <b>Email and Relaxation Break</b><br><b>Lunch</b><br><b>Large Group Discussion</b>   | Each small group presents its top three implications to the full group. The moderator identifies common themes among the implications.   |
| 1:00– 1:20 pm  | <b>Individual Reflection</b><br><br><u>Question 3:</u> Given our discussions and general agreement on the changes impacting our members and the implications for our association, what do we <b>need to do differently</b> over the next three years to be successful? | Participants complete Question 3 of the Looking Forward® Worksheet on their own, describing the top three most significant changes the association will need to implement.<br><br>Afterward, allow 5 minutes to break into small groups. |
| 1:25 – 2: 30 pm                                      | <b>Small Group Discussion</b>  | Each small group reviews the other participants' responses and agrees on the top changes the association needs to consider to be successful.   |
| 2:30 – 2:45 pm<br>2:45–3:45 pm                       | <b>Coffee Break</b><br><b>Large Group Discussion</b>   | Each small group presents its top three identified changes to the full group. The moderator identifies common themes among the specified changes.  |
| 3:45 pm – 4:30 pm                                    | What are the <b>next steps</b> necessary to translate the preliminary ideas into action?   | The large group agrees on the priority of the issues to be addressed. It discusses and decides on the next steps necessary to advance the discussion throughout the association and assess how best to implement change.                 |

## Onsite Worksheet for Participants

The following worksheet is designed to guide discussion group participants through the key questions affecting future-oriented strategy and arrive at a consensus. It should be used with the full-day meeting agenda on the previous pages.

### Instructions to Participants

This worksheet is designed to help you organize your thoughts and ideas before discussing your views with your colleagues. It should be used with the information from Looking Forward® 2026 and any complementary research or information you have received.

You will answer the question in each area just before the discussion period.

**Do not** complete all the questions at once – your response to each will be based on the outcome of the small group discussions for previous questions.

### *Advice and Tips*

The following are tips to improve the productivity of your discussions based on the Association Laboratory's experience facilitating staff and leadership retreats.

- The point of the worksheets is to help each participant organize their thoughts before the discussion. It is not a test.
- People will complete the worksheets differently. Some will scrawl notes, some will write paragraphs, and some won't write anything. They can decide to use the tool in any manner they see fit.
- for prioritization purposes, the Association Laboratory recommends three responses for each question; some people will have more, some less. Note that a short, undeveloped answer may be insufficient to determine implications, and a long list of potential issues makes prioritization difficult.

### Question 1: Member Environment

Given the information in Looking Forward® 2026, supplementary association research, and our experiences with members, what are the **top three issues** with the most impact on our members?

Question 2: Implications for the Association

After completion of Question 1.

Given the identified thematic issues facing our members and the data in Looking Forward® 2026, what are the three most significant implications for our association's future and strategy?

Question 3: Changes to Association Strategy

After completion of Question 2.

Given our discussions and general agreement on changes impacting our members and the implications for our association, what **things do we need to do differently over the next three years to succeed?**