



Association Management: A Case for Building a Comprehensive Body of Knowledge

The Emergence of the Association Management Profession

First in the Series

This white paper describes the emergence of association management as a profession within the nonprofit sector and the challenges that have arisen as a result. It is the first in a series of three white papers making the case for a comprehensive systems-oriented principles-focused body of knowledge to support the governance and management of these organizations. The ultimate goal in doing so is to provide association management professionals with the knowledge and tools that will help them deliver a much more worthwhile and meaningful experience for the members of their organizations.

To maintain brevity, this paper has compressed the actual timeline of events thereby straining historical accuracy. The ultimate goal of the white papers in this series is to identify the pressing issues affecting the further advancement of this profession and offer a suggested solution.

Mission

The Melos Institute is dedicated to creating and disseminating a comprehensive body of knowledge for the advancement of membership-based organizations.

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Emergence of Associations and a Profession

From the colonial period to the present, associations have enjoyed a distinguished history in our society, representing a wide range of professions, trades, and personal avocations. Most of us are only familiar with our own affiliations. But when we become sensitized to their wider existence - stickers, decals, pins and all kinds of promotional products bearing the organization's name and logo magically appear identifying someone's affiliation with another such institution.

As yet, no formal approach has been taken to determine precisely how many of these organizations exist in our society. A good estimate suggests that associations represent approximately ten percent (120,000) of the 1.2 million organizations within the nonprofit sector. Approximately 55 million Americans are members of an association representing a profession, trade or personal avocation organization¹. And, an estimated one million individuals are employed in a wide range of staff positions.²

Individuals and groups establish these organizations to address specific challenges or threats to a vital concern they have. Their efforts are then directed toward mobilizing others to join them to address those concerns. We define these types of institutions as membership-based organizations. A **membership-based organization (MBO)** is drawn from a population of individuals or organizations that voluntarily join together to promote and protect their mutual interests. The members of these organizations are generally self-selected but membership is

often limited to those who possess a specific set of qualifications. For most of these organizations at the founding members voluntarily fulfill the routine tasks necessary for their operations. Even as it grows, members must continue to perform certain key functions (like serving in volunteer leadership roles or contributing their information and expertise toward building their discipline's body of knowledge) if the organization is to sustain itself over time and stay true to its mission.

Because of the relationships that develop and the functions that are established, these organizations reflect many of the attributes of a community³. In some cases the term 'family' has been used in the published histories of these organizations to describe the feelings of affiliation that were created in their formative years. These feelings of affiliation remain and are generally extended to newer members. These feelings are reinforced in the organization's rituals or in stories and myths that are continuously repeated at meetings or important ceremonies.

These developmental patterns are repeated with remarkable regularity as new organizations emerge. As they become successful and grow in size and complexity, hiring a professional staff is often required. Staff recognize that they can never replace the members' knowledge and expertise in the core content areas but seek to support members in successfully fulfilling the organization's mission. With the introduction of staff, new roles and role relationships are created. And over time the role staff

¹ Generations and the Future of Association Participation, The William E. Smith Institute for Association Research, 2006

² Associations Matter: Associations by the Numbers, ASAE & the Center for Association Leadership, 2007

³ A community is defined as an organized population that is able to sustain itself over time.

play as association managers has gained traction and status as a profession. And, as expected, this profession has followed the same path in forming its own set of membership-based organizations.

While associations have been in existence for a much longer period of time, around 1920 a number of trade association managers recognized that they too could benefit personally and professionally from being organized. They also recognized that such an organization could provide support to help other managers increase their efficiency and effectiveness. They founded the American Trade Association Executives (ATAE). Ironically it took fifteen years before the ATAЕ leadership was willing to employ its own association manager.

As the profession matured and expanded, ATAЕ realized it needed to expand its membership and broaden its mission. In 1956, it changed its name to the American Society of Association Executives (ASAE). From its inception, ASAE focused on education as its primary objective; a commitment that has continued to this day.

"It is important that the business world generally knows that the work of the trade executive is a profession, and when trade associations require executives they should look for a man skilled in the profession."
Emmet Naylor
ATAE's President
1921

During the post World War II era, many thousands more associations were formed representing an ever widening range of trade, professional and personal avocations. This growth has given association management greater visibility and status; increasing the attractiveness of these positions. This growth has also led to the increase in the number of associations nationwide – at all levels –representing association managers. The term, as seen in the sample below, most often used to describe these institutions has been the "society of association executives."



- Empire State Society of Association Executives (ESSAE)
- California Society of Association Executives (CalSAE)
- New England Society of Association Executives (NESAE)
- Tallahassee Society of Association Executives (TSAE)
- Association Forum of Chicagoland

To meet the unique needs of specific disciplines, new organizations were also formed by association man-

agers. They focused on supporting a specific sector of society from medicine to engineering and more.

- American Association of Medical Society Executives (AAMSE)
- Council of Engineering & Scientific Society Executives (CESSE)
- National Alliance of State Pharmacy Associations (NASPA)

The emergence of organizations supporting association management professionals did not stop there. Many large national and international membership-based organizations with local, state and regional components (with association managers at those levels) also recognized the benefits of providing specific opportunities for these individuals to connect with their peers. Organizations were established that often affiliated with the larger association. For example, the Executive Officers Council of the National Association of Home Builders (NAHB) was established in 1964 to represent the 875+ association managers whose state and local associations are affiliated of NAHB.

Many opportunities now exist for association managers to connect with fellow colleagues. The decision of where to connect is an individual one. All of these institutions focus on serving the association professional regardless of scope. Each remains committed to serving these paid professionals by providing quality education, outstanding member services, and an opportunity to communicate with colleagues who share similar goals. Yet despite the number of organizations that exist to serve association management professionals, many of the same management and governance challenges and obstacles remain.

Professional Development as a Means to Advance the Profession

As with most occupations, those involved in association management also recognized early on the value of sharing and exchanging information about their respective work. Since no formal body of knowledge existed, it was the only way to supplement their professional development. As these organizations increased in size, scope, and complexity, it became evident that something more formal had to be created. ASAE rose to the task in 1970 by establishing the CAE voluntary certification program (Certified Association Executive). Those who successfully passed the exam would represent a distinguished group of professionals who possessed a level of awareness and knowledge of association management over others who had not.

Since the inception of the CAE designation, those in the profession have had the opportunity to attend a wide range of educational events (often to satisfy a

specific topical interest like membership development, social media, legislative advocacy, etc.) from a host of associations and other companies. Others have chosen to pursue a more structured learning experience via the CAE designation program (to secure a broader understanding). While this evolution was underway in the association community, another was forming within academic institutions that would have an equally interesting impact on the larger nonprofit sector.

The Study of Nonprofit Organizations as a Strategy to Advance Professional Development

As previously indicated, nearly 1.2 million nonprofit organizations operate within the United States. They represent an enormous range of organizations, institutions, and social interests. From hospitals, to schools, to social service institutions, they command great resources from the government and other funding agencies. They are recognized by the public as empowering and furthering the well-being of our civil society (from educating youth to providing health services, to serving the disenfranchised).

In the past few decades, an interest has emerged among academicians to study these institutions in greater depth. That effort has led to the establishment of academic courses and formal degree programs in nonprofit management. At last count, 292⁴ such programs exist nationwide among a wide range of private and public colleges and universities. These nonprofit management programs include coursework designed to serve the broad needs of the nonprofit profession from board governance, to management to fund development. Not surprising, the core content included in the curriculum is quite varied despite attempts among academics to find common ground in the field.

About the same time nonprofit practitioners were also busy forming new organizations (e.g. Board-Source, CompassPoint, State Associations of Non-profit Management, etc.) dedicated to providing professional development opportunities for the paid staff operating within the nonprofit sector. A great deal of information has been generated over the years covering a wide range of topics. Additionally, even more information and material has been developed by practitioners who have left this chosen field to become consultants serving the nonprofit and association management communities.

More awareness and knowledge about the funding, governance, and management of nonprofit organizations exists today than ever before in our history.

⁴ Survey conducted by Seton Hall University, 1996.

Yet agreement has not as yet been reached on the most appropriate message, management techniques as well as suitable roles for board, volunteers and staff. With the continued growth in attendance of students in the academic setting as well as participants at training sessions, the number of institutions providing information on nonprofit management and governance is expected to remain strong.

Questions Needing Further Study

While we have some perspective, the questions that remain unresolved for us focus first on whether the educational efforts developed by the larger nonprofit sector sufficiently support and reflect the attributes of membership-based organizations (whose members are more homogenous in scope).

Some of the more specific questions include:

1. Are there distinguishing features between and among the various types of nonprofit organizations? If so, what are they?
2. Do all nonprofit institutions reflect the same structure and function?
3. Do volunteer and staff leaders play the same roles and possess the same responsibilities across the nonprofit sector?
4. When it comes to establishing curriculum content to build competence among nonprofit professionals, does one size fit all?

Our curiosity also led us to examine why many of the same obstacles and challenges have remained over time within the association management profession. That interest initiated a different set of questions that included:

1. While many professional development opportunities exist in the association management profession, what impact is it having on advancing the overall competence and capacity of professionals?
2. Do actual solutions exist to address many of the obstacles or challenges that have persisted over time?
3. Can information and knowledge, developed for other disciplines and sectors, be used to accomplish similar desired outcomes in membership-based organizations?
4. Can a profession be built upon information and knowledge that has no underlying set of principles and theoretical framework?

At the Melos Institute, we argue that not all nonprofit institutions are the same. We present our reasons why membership-based organizations are distinctly different in another white paper entitled,

"*Membership-based Organizations as Agents of Social Change.*" Further examination has led us to believe that the association management profession needs its own ***unique comprehensive systems-oriented, principles-based body of knowledge.***

A small group of professionals, practitioners, and academicians joined together to examine a number of strategies to determine the most practical approach to developing such a body of knowledge. Establishing an ***international independent think tank*** that would provide an impartial and apolitical space for those interested was determined to be the best approach. Within this space, professionals could come together to explore and create new ideas, techniques, and approaches to increase effectiveness. Then test, analyze and share the findings to build a set of meaningful tools that contribute to a comprehensive systems-oriented, principles-based body of knowledge.

The Melos Institute⁵ is that agent. Its goal is to build upon the established practical, pragmatic, and theoretical approaches. Additionally, it seeks to provide a fresh perspective; one that recognizes that a membership-based organization as a social system that operates with a corporate structure and a uniquely defined community.

Our efforts focus on developing a comprehensive principles-based systems-oriented body of knowledge complete with theories, paradigms and models that reflect these dimensions. This approach is different in that it starts out by taking a more strategic approach in building a theoretical framework. At the same time our efforts seek to weave together the specific strategies and tactics with sound theories and new practices.

We invite you to participate with us in this most exciting and meaningful endeavor.

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Visit us at: www.melosinstitute.org
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⁵ The Melos Institute is a 501(C)(3) nonprofit organization.