



Education Survey Summary 2016



TSAE
Texas Society of Association Executives

Introduction

As part of the Developing Leaders strategic initiative, the Texas Society of Association Executives (TSAE) conducted a survey of its membership in order to identify gaps in educational programming. This summary provides an overview of the responses we received from association executive staff and CEOs .

The survey was member-led and included a member workgroup that informed the goals, process, and questions. Over 250 responses were collected from members and prospect members (January 13-29, 2016) in order to take a pulse of their professional development needs.

The majority of TSAE education is developed through a task force of informed members working together to identify trending topics and influential speakers. Results from the survey conducted will now be used in conjunction to assembling a member task force in order to determine 2017 programming.

Because TSAE serves a diverse membership of individuals working for a variety of associations from various staff size, budget, membership, it's vital for TSAE to continue to ask members about their needs and what problems are challenging their organizations.

The feedback generated from the survey provides insights on the trending topics and the challenges associations are currently facing as well feedback about where constituents are receiving their professional development and their goals for earning the Certified Association Executive credential.

Education Survey Workgroup

Stacy Cantu, CAE, THA Foundation

Denise Finch, Marriott

Veronica Garza, Southern Gas Association

Kelly George, CAE, SeminarWeb

Kent Hughes, SeminarWeb

Ursula Jimenez, IBAT

Brian Levy, Texas Charter Schools

Regina Lim, Texas Hospital Association

Ginger Meyners, CAE, TCASE

Trevor Mitchell, CAE, American MENSA

Ryan Poulos, Real Estate Council of Austin

Rachel Reed, Texas Ophthalmological Association

Donicio Rubalcava, Freeman

Jessica Smith, Order of the Golden Role

Steven Stout, CAE, HFTP

Gloria Terry, Texas Council on Family Violence

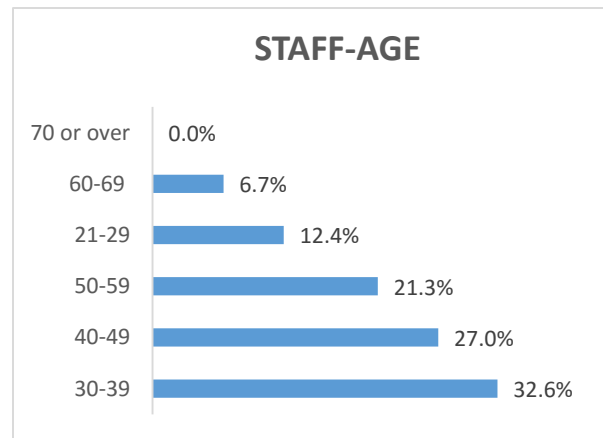
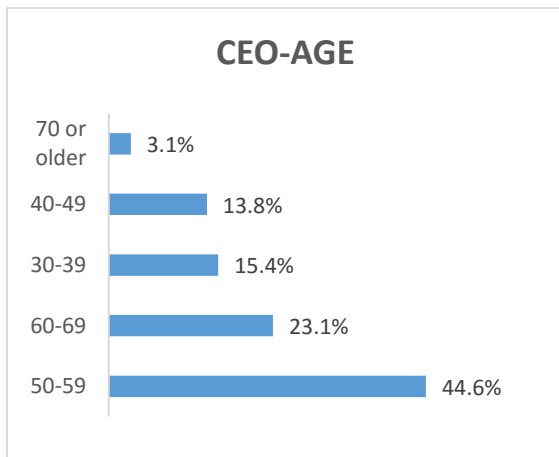
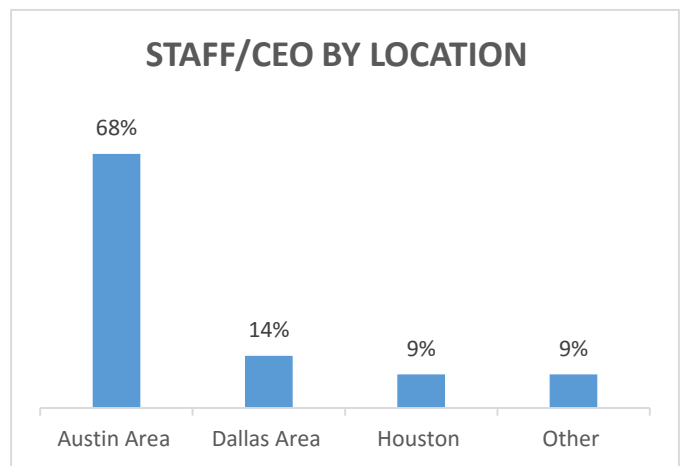
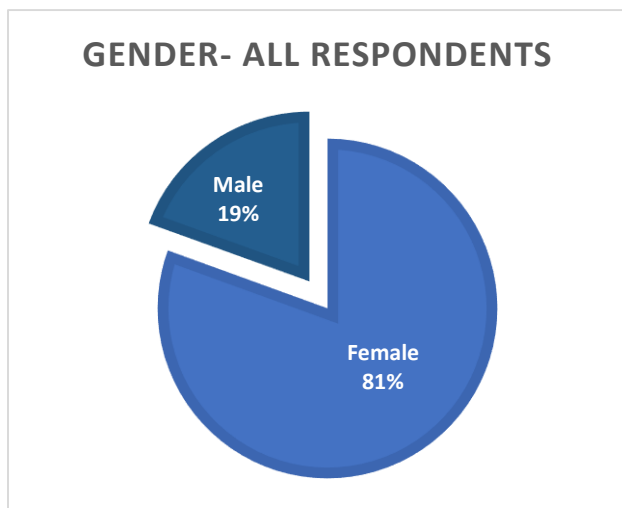
Megan Woodburn, CAE, Strategic Association Management

Survey Sponsored by

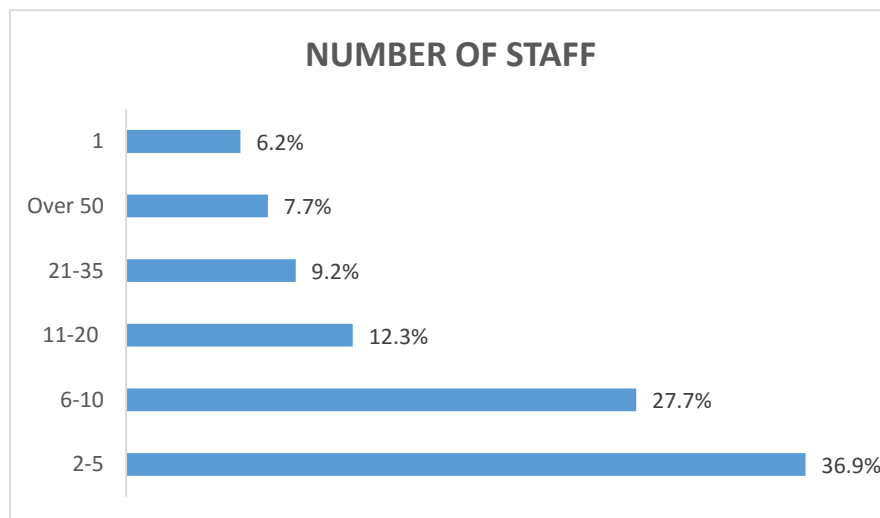
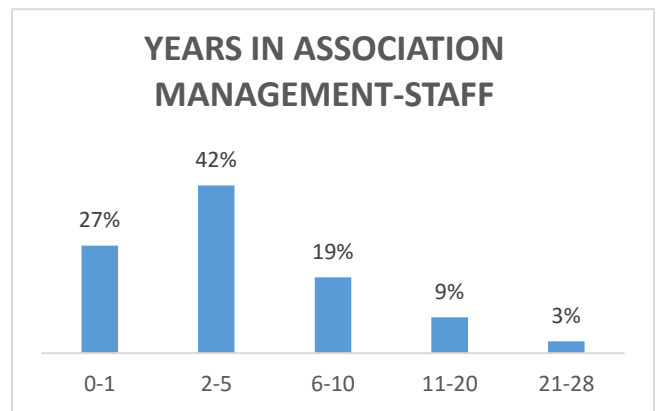
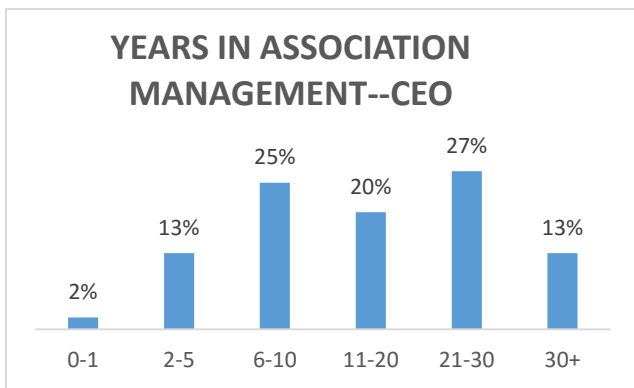
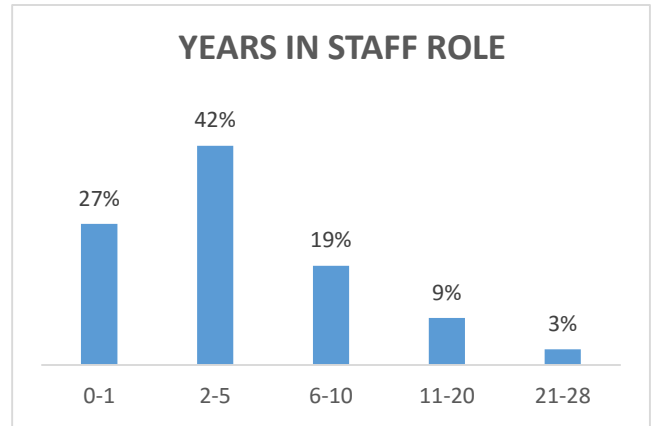
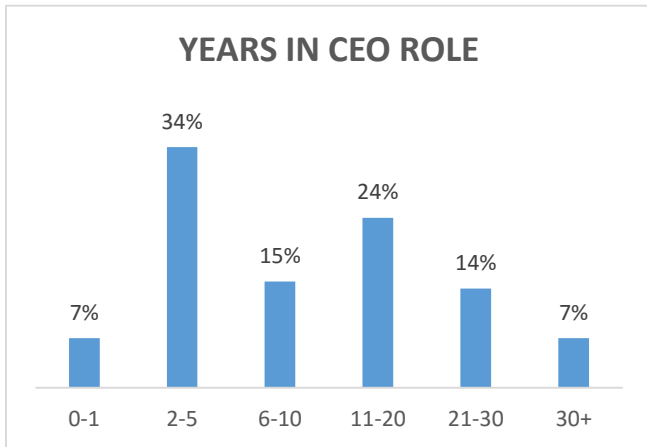


WHO WE SURVEYED

| Constituents | Invited | Response Rate |
|------------------------------|---------|---------------|
| Member CEO | 231 | 28% |
| Prospect CEO | 272 | 5% |
| Member Association Staff | 348 | 26% |
| Prospect Staff | 1412 | 5% |
| Member Affiliate | 347 | 7% |
| Total Invited to Participate | 2610 | |
| Total Responses | 257 | 10% |



Work Experience and Staff





Top Three Topics for Staff

Association staff members were asked to identify the top three topics in their respective department; CEOs identified topics their staff needed. While there was a diverse list of topics, there were 1-2 common topics that were shared by both the CEO and Staff. Overlapping topics are bolded and underlined.

Communications

| CEO | STAFF |
|--|--|
|  <ol style="list-style-type: none">1. Building Plans for Diverse Constituencies2. Communicating Effectively by Email3. Communication-Maximize Member Engagement4. Effective Use of <u>Social Media</u>, |  <ol style="list-style-type: none">1. Creating a Marketing/Communications Plan2. <u>Social Media</u>3. Content Creation |

Membership

| CEO | STAFF |
|---|--|
|  <ol style="list-style-type: none">1. Communicating Membership Value2. Member <u>Engagement</u>3. Member Incentives4. Membership Recruitment and <u>Retention</u> |  <ol style="list-style-type: none">1. Membership <u>Engagement</u>2. Membership Campaigns3. <u>Retention</u> |

Meeting Planning & Events

CEO



1. Contracts and New Trends
2. Event Marketing
3. Experimental Events, Productive Networking
4. Food & Beverage Planning

STAFF



1. Developing an Request for Proposals (RFP)
2. Planning Menus for you Event
3. Evaluating Events

Technology

CEO



1. Online Communities
2. Using Technology to Engage
3. Association Best Practices

STAFF



No staff respondents submitted responses for the technology portion of the survey.

Sponsorship and Business Development

CEO



1. Sales Training
2. Relationship Building
3. Current Trends

STAFF



1. Sponsorship trends
2. Communicating value/benefits
3. Developing Sponsorship levels

Education

CEO



1. Trends and Best Practices in Adult Learning
2. Staying Relevant
3. Measuring Effectiveness



STAFF

1. Developing Customized Curriculum
2. Creating revenue through CE offerings
3. Adult Learning Styles

Finance

CEO



1. Budgeting
2. Financial Reports and Analysis
3. Creating Reports and Tracking Costs of Projects
4. Accounting 101



STAFF

1. Preparing for Audits
2. Financial Controls (segregation of duty)
3. Form 990

Public Policy & Government Relations

CEO




1. Laws, Rules, Regulations and Reporting
2. Legislative and Grass Roots Advocacy Best Practices
3. Do's and Don'ts of Lobbying



STAFF

1. Political Action Committees
2. Organizing an Advocacy Day
3. Media Relations

Administration

| | |
|---|--|
| <p>CEO</p>  <ol style="list-style-type: none">1. Project Management2. Operations3. Strategic Planning | <p>STAFF</p>  <ol style="list-style-type: none">1. Elements of Contract/Negotiations2. Employment Appraisals/Annual Evaluations3. Developing/Revising an Employee Policy and Procedure Manual |
|---|--|

Other

| | |
|---|--|
| <p>CEO</p>  <ol style="list-style-type: none">1. <u>Managing Volunteers</u>2. Contracts and Negotiations3. Vendor Management | <p>STAFF</p>  <ol style="list-style-type: none">1. <u>Volunteer Management</u>2. Improving the Member Experience3. Membership Trends, Dues Options |
|---|--|

CEO Education

We asked CEOs what their education topics or opportunities that would help their find solutions to their Organizational Challenges? Three main areas of focus were identified.

BOARD, STAFF and MANAGMENT TOPICS

- Encouraging Volunteers and Leadership Commitment How to deal with difficult board members
- Board communications
- Keeping board energy level high, but not micromanaging
- Board Relations
- Setting up Boundaries with Board Members
- Volunteer motivation
- Managing negative and/or difficult board members
- How to assist in changing bylaws without overstepping boundaries
- Board Relationships - development, off boarding

- HR issues
- Communications with staff
- Keeping high energy staff and focused on priorities
- How to manage salary increases and staff growth
- Emotional Intelligence
- Employee motivation
- Small staff management an effective staff meeting how to reward staff without always spending money

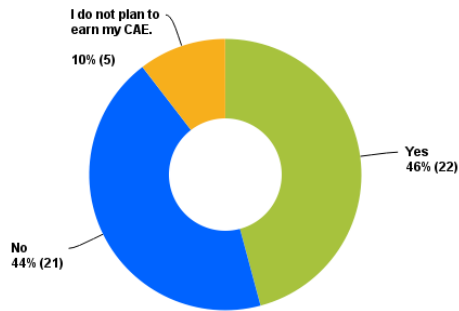
- How to delegate
- Evaluation and compensation
- Managing Time and Priorities
- Succession Plans
- Managing Disruptive Change
- Coaching skills
- New methods of performance appraisals overall program evaluation
- Techniques to energize staff

Career Development

Certified Association Executive Designation

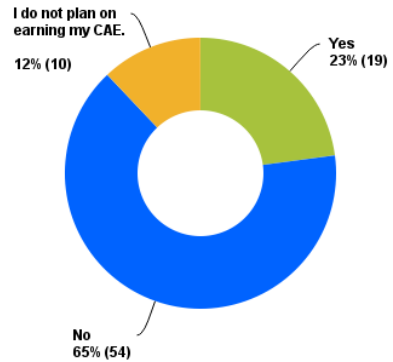
Q14 CEO: Have you earned your Certified Association Executive (CAE) designation?

Answered: 48 Skipped: 17



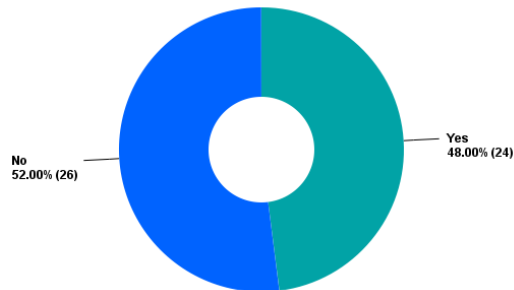
Q40 Staff: Have you earned your Certified Association Executive (CAE) designation?

Answered: 83 Skipped: 6



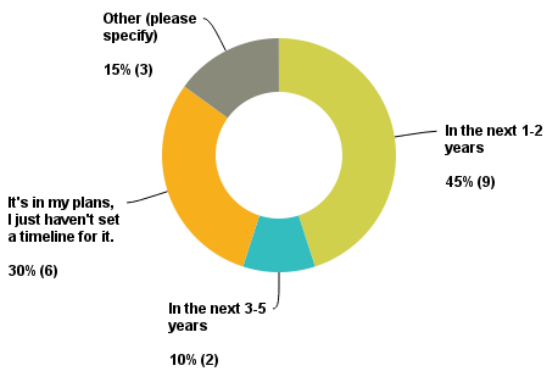
Q8 CEO: Do you encourage staff members to earn their Certified Association Executive (CAE)?

Answered: 50 Skipped: 15



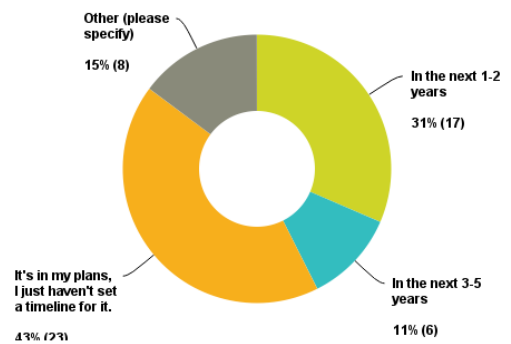
Q15 CEO: When do you plan on earning your CAE?

Answered: 20 Skipped: 45



Q41 Staff: When do you plan on earning your CAE?

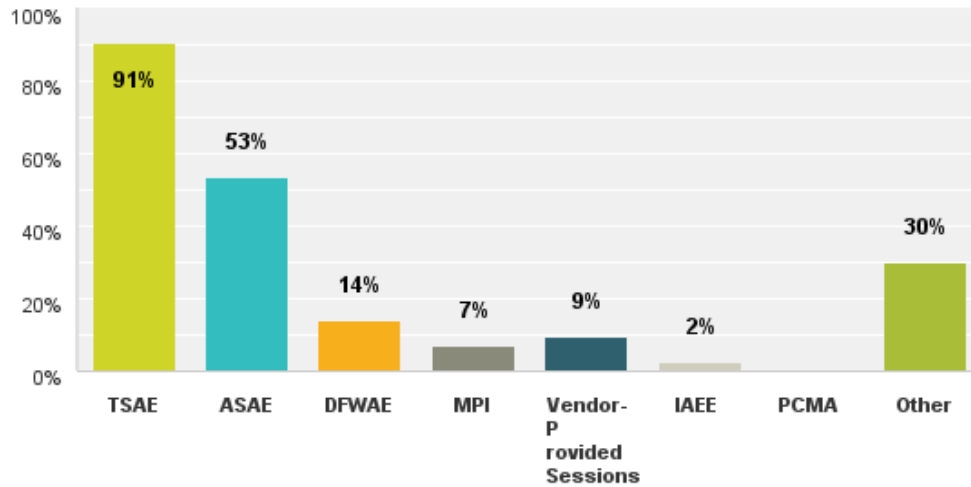
Answered: 54 Skipped: 35



Continuing Education Units

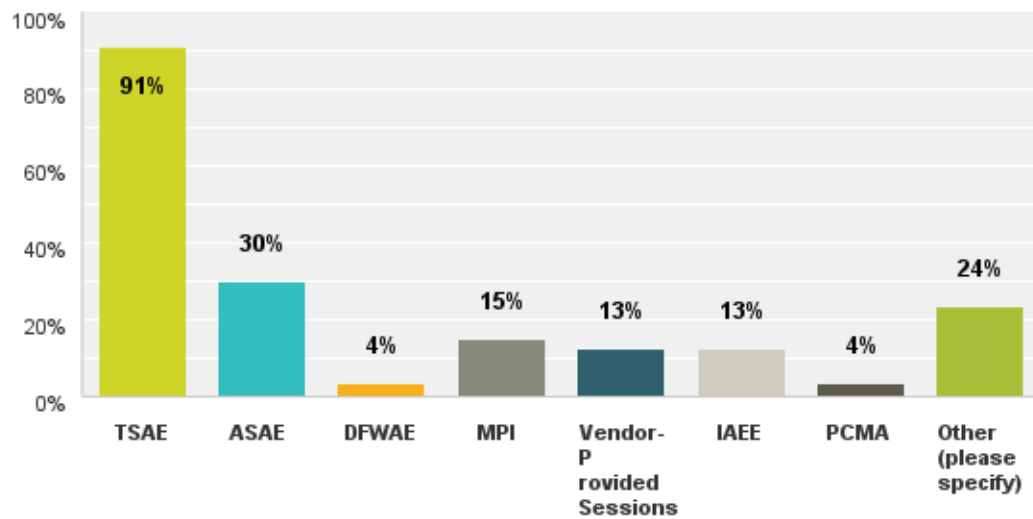
Q17 CEO: Where are you receiving your CAE Continuing Education credits?

Answered: 43 Skipped: 22



Q43 Staff: Where are you receiving your professional development? Or CAE Continuing Education credits?

Answered: 80 Skipped: 9



Certificate Program

49%

**OF CEOS
WERE
VERY INTERESTED**

47%

**OF CEOS
WERE
SOMEWHAT INTERESTED**

4%

**OF CEOS
WERE
NOT INTERESTED AT ALL**