

WELCOMING ENVIRONMENT® RESEARCH **EXECUTIVE SUMMARY**



OCTOBER 2020

Welcoming Environment® Executive Summary

Introduction

Association Forum partnered with association consulting firm McKinley Advisors (McKinley) to conduct sound research and facilitate leadership discussions with an aim to understand the current state of diversity and inclusion efforts in the association sector. Through this initiative, Association Forum intends to shed light on the tools, approaches, successes and challenges that associations are facing as they attempt to accelerate their programs in creating more diverse and inclusive organizations.

Methodology

The project included several key research phases including interviews with 25 key contacts and industry stakeholders and a thorough literature and research review of any past efforts to explore diversity and inclusion efforts in the association sector. Following these research phases,

Association Forum and McKinley recruited co-sponsors to participate in surveys about the importance of DE&I and a Welcoming Environment® as well as challenges encountered and opportunities to advance solutions. Two surveys were deployed, one to association members and one to association staff. Co-sponsors had the opportunity to participate in one or both surveys. Ten associations participated in the member survey with a total of 5,230 overall responses and two associations participated in the staff survey for a total of 134 responses. Associations were provided correspondence language and were encouraged to not only email the survey link to their members or staff, but also to use other communication channels (e.g., social media, newsletters, etc.) to encourage participation.

Participating Co-Sponsors Included:

- American Academy of Physical Medicine and Rehabilitation (AAPM&R)
- American Planning Association (APA)
- American Society of Anesthesiologists (ASA)
- Association of Equipment Manufacturers (AEM)
- Association of Women's Health, Obstetric and Neonatal Nurses (AWHONN)
- Illinois City/County Management Association (ILCMA)
- Institute of Real Estate Management (IREM)
- National Society of Genetic Counselors (NSGC)
- SmithBucklin
 - APRA
 - National Association of Personal Financial Advisors (NAPFA)
- Society of Actuaries (SOA)
- Wisconsin City/County Management Association (WCMA)

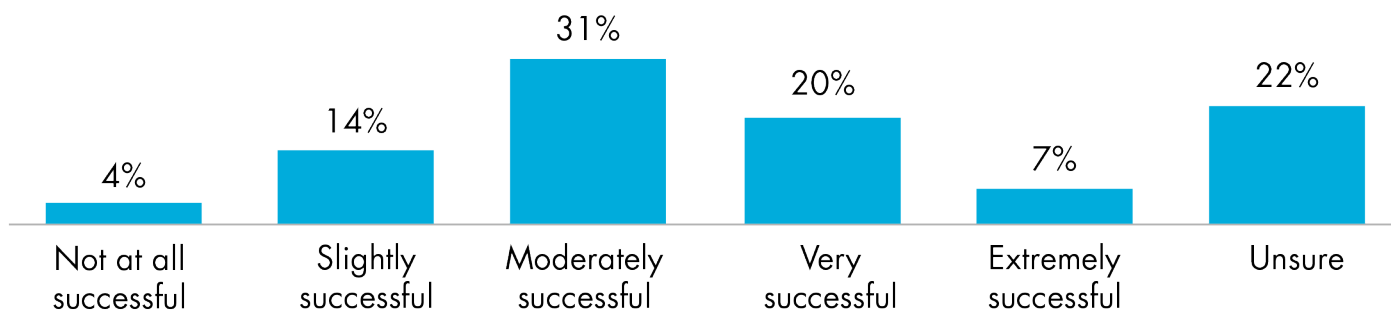
Executive Summary

The following is a summary of key findings that emerged from the research.

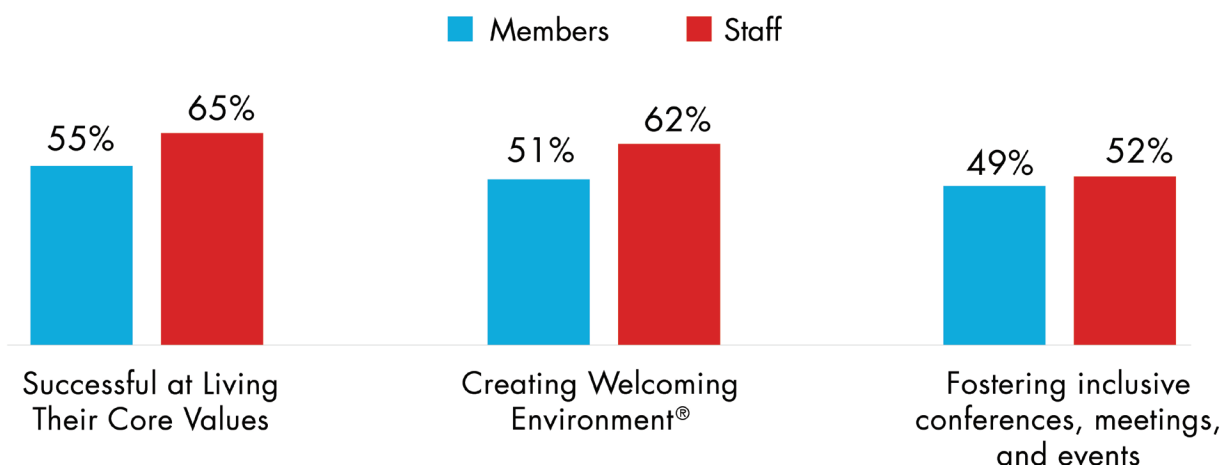
Familiarity with many DE&I related topics was high among both members and staff with an average extremely or moderately familiar rating at 69% for members and 64% for staff. However, the four topics both members and staff had the lowest familiarity with were those that are much more complex and nuanced including: marginalization, microaggressions, allies/allyship and intersectionality. Additionally, females, younger respondents, racial/ ethnic minority members and those who reported they are gay, lesbian or bisexual were more likely to be familiar with these terms. The disparity in familiarity ratings for more complex terms points to an opportunity to raise awareness with members and staff on topics they may have less exposure to or less understanding of.

Generally, both members and staff have neutral opinions of the success their associations have had in integrating DE&I and creating a Welcoming Environment®. Thirty-one percent of members gave their association a “moderately successful” rating, while 27% said the association has been very or extremely successful.

Overall, how would you rate your association’s level of success in integrating DE&I and creating a Welcoming Environment® through its overall practices?
(n=2,480)



Member vs Staff Rating Success in Implementing a Welcoming Environment®



Similarly, 44% of staff said the association has been “moderately successful”, while 21% said the association has been very or extremely successful. However, when looking more closely at specific areas within the association, staff were more likely to report higher levels of success than members. Specifically, staff were most likely to say associations have been successful at living their core values (55% members, 65% staff extremely or very successful), creating a Welcoming Environment® (51% members, 62% staff) and fostering inclusive conferences, meetings and events (49% members, 52% staff).

Members were not satisfied with diversity in association leadership and staff, along with inclusive behaviors that permeate the association. Only 32% and 36% of members found their associations to be successful at having a diverse leadership or a diverse staff, respectively. Members and staff were both least likely to say that their associations create opportunities for inclusion-focused events (52% members, 58% staff) and that inclusion is integrated into everyday behaviors in the association (46% members, 51% staff). This was particularly pronounced for female association staff.

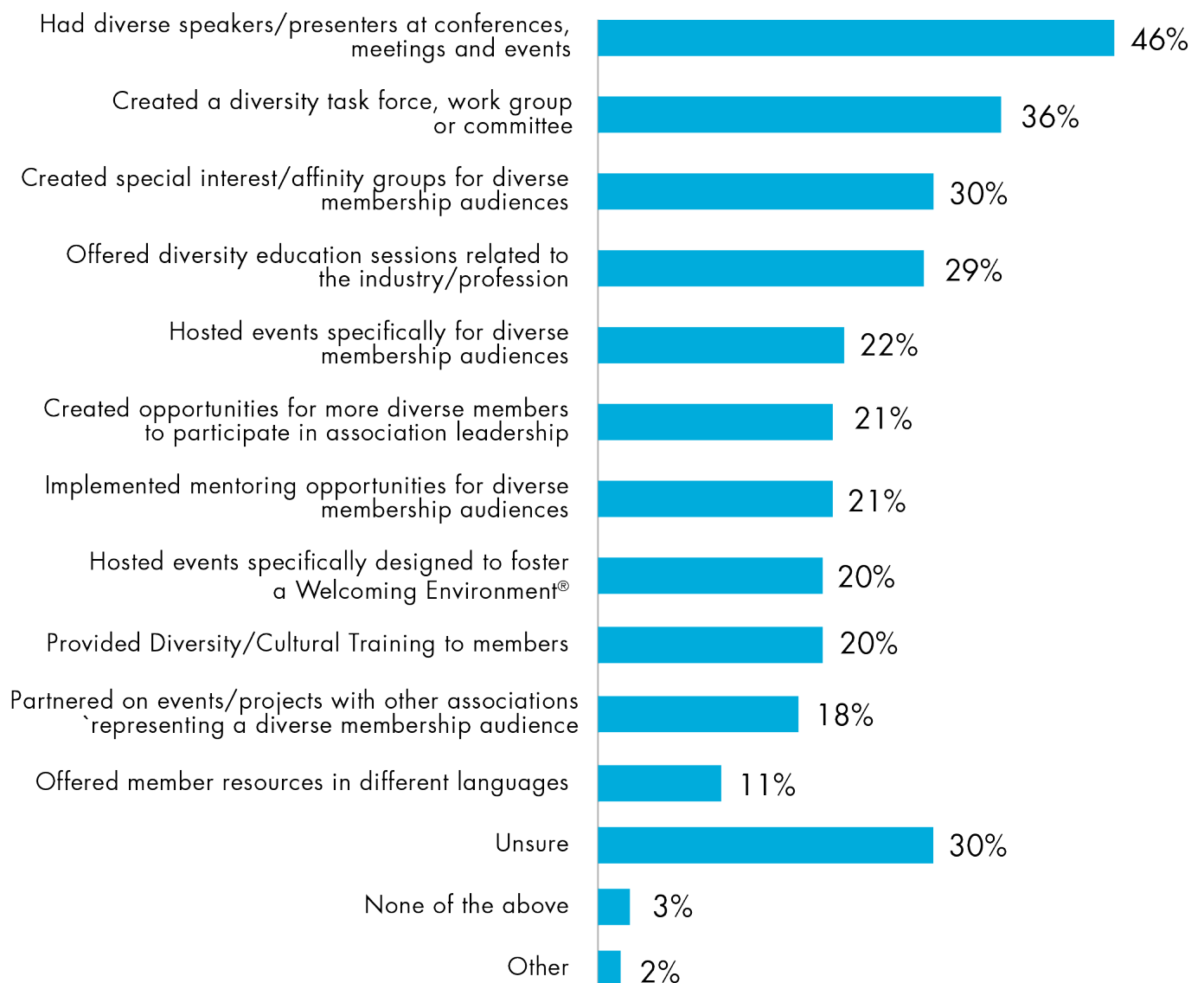
The most common challenges in associations integrating DE&I, as reported by staff, center around finding qualified diverse employees (41%), navigating competing strategic priorities (36%) and lack of time (34%). Finding qualified diverse employees is particularly interesting given that although survey participants were located all over the country, they were predominantly based in the Chicagoland area which is very diverse. This speaks to a larger question about the tactics associations are using in terms of hiring. Other challenges around competing priorities and a lack of time ultimately point to a major issue with prioritization of DE&I goals. Additionally, more than half of staff also reported that their associations have not yet overcome these challenges.

Which of the following barriers to integrating DE&I and creating a Welcoming Environment® has your association faced over the last year? (n=83)



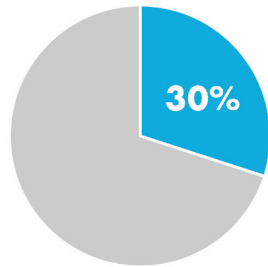
Almost a third of members (30%) were unsure of the specific tactics or strategies that have been implemented by their associations, indicating a prevalent lack of awareness related to DE&I work in their associations. The tactics most likely to have already been implemented to support a DE&I strategy as perceived by members include having diverse speakers or presenters at conferences, meetings and events (46%), creating a diversity task force, work group or committee (36%) and creating special interest/ affinity groups for diverse membership audiences (30%). More than half of staff reported that their associations have implemented tactics related to attracting diverse candidates through job postings (59%), diversity training (51%) and seeking employees' opinions about diversity and inclusion (50%).

Which of the following strategies has your association implemented to address DE&I and create a Welcoming Environment[®] among members? Select all that apply (n=2,219)

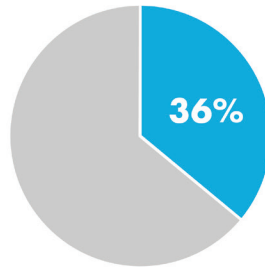


Tactics most likely to have already been implemented to support a DE&I strategy as perceived by members

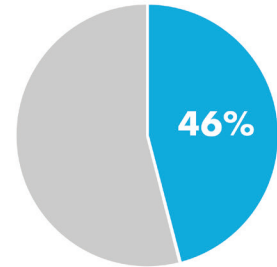
Creating special interest/affinity groups for diverse membership audiences



Creating a diversity task force, work group or committee



Having diverse speakers or presenters at conferences, meetings & events



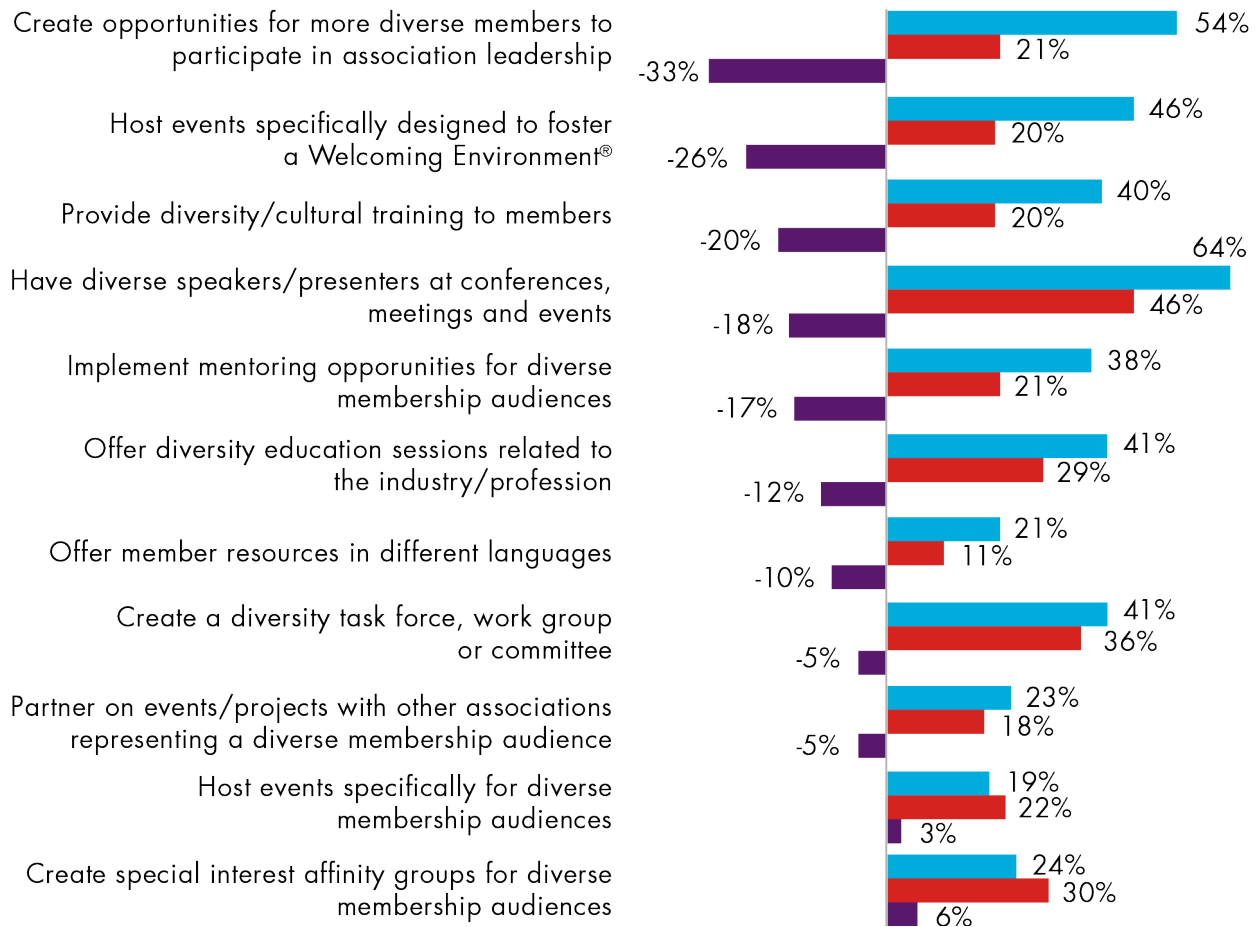
Tactics deemed most necessary by members focus on specific events or meetings held by the association, association leadership and education/training. More than half of members cited having diverse speakers or presenters at conferences, meetings and events (64%) and creating opportunities for more diverse members to participate in association leadership (54%). More than 40% also found hosting events specifically designed to foster a welcoming environment (46%) and offering diversity education sessions related to the industry/ profession (41%) as necessary tactics for any membership organization.

Tactics deemed most necessary by staff focus on training for managers, building inclusive relationships, accountability in the association and getting employees' opinions. More than half of association staff cited providing training for managers on how to be inclusive leaders (67%) and providing opportunities for staff to connect with leadership to build inclusive relationships as necessary tactics. Additionally, almost half of staff find encouraging social accountability throughout the organization (49%) and seeking employees' opinions about diversity and inclusion (49%) as necessary strategies for their association to implement.

When comparing the tactics already implemented and the ones members and staff deem most necessary, findings reveal that the tactics deemed most necessary by members and staff are among the least likely to already be implemented by the association. The biggest gap for members is creating opportunities for more diverse members to participate in association leadership for members (33% gap between "necessary" and "already implemented"). The staff survey revealed that the largest gap is providing training for managers on how to be inclusive leaders for staff (26% gap between "necessary" and "already implemented").

Necessary Tactics vs. What is Already Implemented

- Necessary, “must-have” tactic for any membership organization (n=2,015)
- Already implemented (n=2,219)
- Gap



**Data shown for association members*

For members, feelings of inclusion are low in the workplace with less than half of all members (47% satisfied) reporting they are satisfied with the level of inclusion, while also indicating it is one of the most important attributes to exist within a workplace (89% important). Members also don't find leadership in their workplaces diverse (38% satisfied) – indicating the lack of diversity at leadership levels is not unique to associations. Additionally, 44% of members have witnessed or experienced bias, discrimination or harassment in their workplace within the last year. The impacts of exclusion and discrimination were more acutely felt by historically marginalized groups: women, younger workers (millennials), racial/ ethnic minorities and those with a disability. But these effects are not something rare or only felt by a small group of association members. Thirty-two percent of members reported that their socioeconomic status has a major impact on them on a daily basis outside of their workplace. Similarly, 26% reported the same about their race and/or ethnicity and 22% said their age has a major impact on them on a daily basis. Despite all of this, 72% of members consider their direct manager to be a strong advocate and 71% feel comfortable speaking up if they experience or witness bias, discrimination or harassment.

For more information on establishing a Welcoming Environment at your organization, please visit the resource center associationforum.org/welcomingenvironment.

About Association Forum

Association Forum is the “association of associations” in Chicago. Founded in 1916, Association Forum has 4,000-plus members. These members represent more than 44,000 association professionals from over 1,700 organizations. These organizations serve over 28 million individual members, have 9 million donors and generate \$12.3 billion annually in economic impact. Association Forum’s mission is to advance the professional practice of association management and to provide our members with essential learning, compelling experiences and powerful resources.

About McKinley Advisors

McKinley Advisors is an award-winning association consulting firm providing tailored research, marketing and strategy services to solve unique challenges. They help mission-driven organizations by providing strategic guidance, research and insights, business transformation assistance, and membership and marketing services. For more information, visit www.mckinley-advisors.com.

Association Forum would like to thank the partners who made the Welcoming Environment® research possible:

