DEAR COLLEAGUES:

McKinley’s Economic Impact on Associations (EIA) Study was launched in 2008, a time when associations – and the sectors and members they represent - were feeling severe economic hardship. Now in our eleventh installment of this study, we have watched association perceptions and behaviors shift in response to economic and other environmental factors, yet none of the trends have been as pronounced as those of the early years. Associations have adapted, and today we see strong optimism and a commitment to enhancing value and impact while diversifying revenue streams and participation.

So, what lies ahead? In both our research and day-to-day exposure to hundreds of associations, we hear frank conversations about the future of the association model – even as the concept of affiliation and community remains undeniably relevant. For many associations, the pressing challenge is to remain relevant while relying on a largely 20th century business model. Association staff, leaders and even members are able to envision an ideal future (e.g., increased impact, new opportunities for member engagement, diversification of revenue streams) but they struggle to envision and realize the path to get there. In today’s complex, on-demand, “Amazon Effect” economy, the roadmap is unclear and the question persists: How can associations bridge the gap from past to present and develop viable, new models for success? In this year’s report, we draw back the curtain on current challenges and opportunities and provide insight into how associations are keeping pace with evolving member and market expectations.

We appreciate the time invested in this project by each of the nearly 200 association executives who responded to the survey, and we look forward to continuing to deliver meaningful studies that help organizations understand the larger environments in which they - and their members - are operating. If you would like to discuss the data in more depth, arrange a presentation for your staff or Board, or participate in future benchmarking presentations, please contact Jay Younger at jyounger@mckinley-advisors.com.

In partnership to advance association impact,

Jay Younger, FASAE
President & CEO
McKinley Advisors
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<td>34</td>
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</tr>
</tbody>
</table>
**INTRODUCTION**

In the midst of the Great Recession, McKinley Advisors launched the first EIA Study to examine how associations monitor, manage and, in some cases, thrive in dramatically changing economic conditions. Since the initial report, the EIA series has provided insight into the resilience of associations.

*So, what is consistent and what has changed as we dive into the economic impact of associations today?*

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### Survey Methodology

McKinley deployed an online survey to association executives and staff from January 18th to February 9th, 2018 to collect key data around the economy, its impact on associations, how associations are responding and implications for the future. Survey invitations were sent to McKinley contacts as well as distributed through various social media channels to collect as broad a response as possible. The results presented here emerged from 184 responses representing a broad spectrum of the association community.

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<table>
<thead>
<tr>
<th>Consistencies</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Economic Impact</strong></td>
<td>Associations are experiencing fewer economic surprises, as financial projections and preparedness have improved and remained relatively constant since 2012.</td>
</tr>
<tr>
<td><strong>Membership</strong></td>
<td>Member retention trends remain stable, with the majority of professional associations reporting a retention rate above 80% and the majority of trade associations reporting retention above 85%.</td>
</tr>
<tr>
<td><strong>Organizational Priorities</strong></td>
<td>Concern over core business lines, particularly membership, continued to rise.</td>
</tr>
<tr>
<td><strong>Organizational Actions</strong></td>
<td>Associations have continued to expand programs and grow staff positions for the past several years.</td>
</tr>
</tbody>
</table>

**The Bottom Line:** Despite continued economic expansion, new challenges and concerns are top of mind for association executives. Changes in organizational priorities and actions related to legacy programs, models and structures are under increased pressure, perhaps suggesting more substantial changes related to value delivery are on the horizon for many associations.
ECONOMIC IMPACT ON ASSOCIATIONS STUDY: 2018 Edition

>>> SHARPENING THE FOCUS: Associations & the Economy

There were unmistakable positive trends in the economic data McKinley collected through the 2018 EIA survey. It is clear that associations are becoming more adept at predicting and responding to economic conditions, though industry uncertainty continues to cause anxiety related to future outlook.

Reflecting on economic conditions over the past year, 40% of respondents indicated that the impact of economic conditions on their association was better than expected, representing an 11-point increase from the previous year. Segment-specific highlights include:

- Professional associations were more likely to report positive outcomes compared to trade and hybrid organizations.
- Respondents in the Architecture/Construction space reported the highest incidence of better than expected outcomes.
- The fields of Accounting/Finance/Insurance were more likely to report worse than expected economic results.

LOOKING BACK ON THE PAST YEAR, WAS THE IMPACT OF ECONOMIC CONDITIONS ON YOUR ASSOCIATION:

<table>
<thead>
<tr>
<th>Year</th>
<th>Better than expected</th>
<th>About what was expected</th>
<th>Worse than expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>40%</td>
<td>49%</td>
<td>11%</td>
</tr>
<tr>
<td>2017</td>
<td>29%</td>
<td>61%</td>
<td>10%</td>
</tr>
<tr>
<td>2016</td>
<td>32%</td>
<td>55%</td>
<td>13%</td>
</tr>
<tr>
<td>2015</td>
<td>35%</td>
<td>57%</td>
<td>8%</td>
</tr>
<tr>
<td>2014</td>
<td>33%</td>
<td>56%</td>
<td>10%</td>
</tr>
<tr>
<td>2013</td>
<td>33%</td>
<td>57%</td>
<td>10%</td>
</tr>
<tr>
<td>2012</td>
<td>44%</td>
<td>45%</td>
<td>11%</td>
</tr>
<tr>
<td>2011</td>
<td>42%</td>
<td>42%</td>
<td>16%</td>
</tr>
<tr>
<td>2010</td>
<td>36%</td>
<td>37%</td>
<td>28%</td>
</tr>
</tbody>
</table>
Association staff shared that concern for the economy and its impact on their association had generally decreased (34% “more concerned” in 2017 compared to 25% in 2018). Further, compared to previous years, participants experienced improvements in key measurements of organizational health, such as retention, and reflected that economic conditions in 2017 were largely better than expected. While categorical improvements were marginal, associations reported a growing sentiment of increased stability and optimism for the year ahead.

**ASSOCIATION OUTLOOK**

**ECONOMIC OPTIMISM FOR ASSOCIATION**

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>About expected</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>Worse</td>
<td>25%</td>
<td>34%</td>
</tr>
</tbody>
</table>

**INDUSTRY OUTLOOK**

**ECONOMIC OPTIMISM FOR INDUSTRY**

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>About expected</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td>Worse</td>
<td>31%</td>
<td>39%</td>
</tr>
</tbody>
</table>

1 Question: “Compared to this time last year, how do you feel about the economy with regards to your association?

2 Question: “Compared to this time last year, how do you feel about the economy with regards to the industry your association represents?”
Associations have benefited from better than expected economic conditions and are generally operating from a position of strength compared to previous years. Research findings validated that associations were slightly more optimistic about economic conditions in 2018 compared to 2017. That said, they continue to maintain caution about the possibility of future instability and unexpected changes in the environment.
THE STATE OF MEMBERSHIP

The chart below depicts the net membership growth reported in each EIA Study. The net membership growth is calculated to represent the difference between the percentage of respondents who reported a higher membership trend over a five-year period and the percentage of respondents who reported a lower membership trend over the same five-year period.

\[
\text{Net Membership Growth} = \\
(\% \text{ Reporting Higher Membership Trend}) - \\
(\% \text{ Reporting Lower Membership Trend})
\]

Associations experienced a steady upward trend in net membership growth from 2011 to 2015. Since the peak in 2015, the data suggests year-over-year stabilization, or perhaps a slight decline.
These annualized membership trends showcase volatility by sector and support the notion that:

- **Accounting/Finance/Insurance** associations as a sector have yet to reach pre-2009 membership numbers and were more likely than other sectors to report worse-than-expected (21%) economic impact in 2017. Looking ahead, they expressed moderate levels of increased economic optimism in 2018 compared to other sectors relative to their association (29%) and industry (26%). Associations in this sector experienced an 11-point increase in annualized five-year membership trends from 2017 to 2018, which provides reassurance for a future of continued sector growth.

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<table>
<thead>
<tr>
<th>Year</th>
<th>Accounting/Finance</th>
<th>Education/Humanities</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>5%</td>
<td>-4%</td>
</tr>
<tr>
<td>2011</td>
<td>38%</td>
<td>-25%</td>
</tr>
<tr>
<td>2012</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>2013</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>2014</td>
<td></td>
<td>4%</td>
</tr>
<tr>
<td>2015</td>
<td>6%</td>
<td>23%</td>
</tr>
<tr>
<td>2016</td>
<td>-4%</td>
<td>4%</td>
</tr>
<tr>
<td>2017</td>
<td>3%</td>
<td>26%</td>
</tr>
<tr>
<td>2018</td>
<td>14%</td>
<td>37%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Healthcare</th>
<th>Scientific/Engineering</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>44%</td>
<td>-4%</td>
</tr>
<tr>
<td>2011</td>
<td>54%</td>
<td>13%</td>
</tr>
<tr>
<td>2012</td>
<td>29%</td>
<td>6%</td>
</tr>
<tr>
<td>2013</td>
<td>48%</td>
<td>6%</td>
</tr>
<tr>
<td>2014</td>
<td>26%</td>
<td>6%</td>
</tr>
<tr>
<td>2015</td>
<td>51%</td>
<td>6%</td>
</tr>
<tr>
<td>2016</td>
<td>37%</td>
<td>6%</td>
</tr>
<tr>
<td>2017</td>
<td>30%</td>
<td>-2%</td>
</tr>
<tr>
<td>2018</td>
<td>17%</td>
<td>-18%</td>
</tr>
</tbody>
</table>
• **Architecture/Construction** associations saw an uptick in growth and operate in a state of relative strength today (likely associated with an improved economy and trends in the industry, such as growth in housing construction). These associations largely reported positive economic conditions in 2017, but maintained caution about the year ahead – reporting the second highest level of future concern for their associations.

• **Education/Humanities** associations did not report worse-than-expected economic impact in 2017. They have also not yet seen annualized membership decreases as aggressive as those experienced in other sectors. However, education and humanities association staff anticipate economic challenges on the horizon and feel the highest levels of concern for the future, likely related to observed instability in the political and regulatory landscape. While other factors may play into this growing concern, historical data provides a more optimistic view; associations in this sector have experienced a continued increase in retention levels and membership growth trends.

• **Healthcare** associations have remained largely insulated from economic uncertainties – likely due to their certification programs and required continuing medical education credits, as well as the fact that demand for healthcare remains constant regardless of economic conditions. These respondents reported that the economic impact on their associations was better than or as expected in 2017. In contrast, they felt more concerned about the economy’s impact on the healthcare industry at-large than on their associations specifically.

• **Scientific/Engineering** associations reported that the 2017 economic impact was better than or about what they had expected. However, executives reported less positive outlooks for the year ahead, in the context of a shifting political and funding landscape, than in recent memory and expressed slightly more concern about the economy’s impact on their associations than on the industry.

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1 Architecture/Construction was not analyzed as an industry segment in previous iterations of the EIA study. Therefore, there is no annualized five-year membership trend for this group.
While membership growth trends have fluctuated, membership retention scores have remained relatively constant since 2011. In 2017, associations saw slight increases in retention from the previous year (+5 percentage points), especially among hybrid organizations (37%), those with organizational budgets under $5 million (32%) and those in the Education/Humanities fields (38%). Trade associations still command the highest membership retention numbers in the field, though mergers and acquisitions continued to strain trade membership models.

### Over the Past 12 Months, Has Your Retention Rate:

<table>
<thead>
<tr>
<th>Year</th>
<th>Increased</th>
<th>Stayed the same</th>
<th>Decreased</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>46%</td>
<td>39%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>23%</td>
<td>45%</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td>2012</td>
<td>24%</td>
<td>46%</td>
<td>28%</td>
<td>12%</td>
</tr>
<tr>
<td>2013</td>
<td>24%</td>
<td>49%</td>
<td>24%</td>
<td>13%</td>
</tr>
<tr>
<td>2014</td>
<td>22%</td>
<td>54%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>2015</td>
<td>21%</td>
<td>54%</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>2016</td>
<td>23%</td>
<td>54%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>2017</td>
<td>24%</td>
<td>54%</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>2018</td>
<td>21%</td>
<td>52%</td>
<td>23%</td>
<td>17%</td>
</tr>
</tbody>
</table>

### One-Year Change in Retention Rate by Organization Type

<table>
<thead>
<tr>
<th>Type</th>
<th>Increased</th>
<th>Stayed the same</th>
<th>Decreased</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hybrid</td>
<td>46%</td>
<td>24%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Trade</td>
<td>62%</td>
<td>24%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Professional</td>
<td>47%</td>
<td>37%</td>
<td>21%</td>
<td></td>
</tr>
</tbody>
</table>

### One-Year Change in Retention Rate by Field/Industry

<table>
<thead>
<tr>
<th>Field/Industry</th>
<th>Increased</th>
<th>Stayed the same</th>
<th>Decreased</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting/Finance/Insurance</td>
<td>29%</td>
<td>43%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Architecture/Construction</td>
<td>15%</td>
<td>62%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Education/Humanities</td>
<td>8%</td>
<td>31%</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Healthcare</td>
<td>25%</td>
<td>47%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Scientific/Engineering</td>
<td>9%</td>
<td>50%</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>
As we look at organizational priorities and actions planned or anticipated by association staff, it is clear that the traditional membership model is under scrutiny. While most associations still enjoy relative stability and predictability in membership, they are also expanding horizons beyond traditional recruitment and retention to a more innovative approach to growth. Trends in data over the past three years have revealed a decrease in the prioritization of new member acquisition and improving member retention. Instead, respondents indicated an increased focus on generating non-dues revenue (33%) and developing new methods for member engagement (30%) – both of which represent a transition toward a more strategic posture to ensure long-term sustainability and respond to changing preferences in the marketplace.

The McKinley Perspective:
“Bolstered by positive indicators of economic strength and informed by research and data, our clients are reconsidering assumptions about their existing membership models and preparing for a more dynamic future. There is a shared acknowledgement that the era of unquestioning support for one’s professional or trade association is long-gone, and that their value propositions are being held to the light. None of this is news – associations have long grappled with the optimal approach to engaging the varied and diverse audiences within their fields, but trends in the data reveal that more and more respondents are accelerating their pace in pursuing new approaches to membership.”
WHAT ARE YOUR ASSOCIATION’S THREE HIGHEST PRIORITIES FOR THE NEXT YEAR?


- Generating non-dues revenue (2018: 33%, 2017: 30%, 2016: 24%)
- Developing new methods for member engagement (2018: 24%, 2017: 19%, 2016: 19%)
- Branding / increasing awareness (2018: 19%, 2017: 18%, 2016: 16%)
- Strategic planning (2018: 15%, 2017: 15%, 2016: 15%)
- New member acquisition (2018: 15%, 2017: 13%, 2016: 12%)
- Improving member retention (2018: 11%, 2017: 10%, 2016: 9%)
- AMS / database upgrade / conversion (2018: 10%, 2017: 8%, 2016: 7%)
- Member segmentation to create personalized experience (2018: 8%, 2017: 6%, 2016: 5%)
- Diversifying membership / attracting new audiences (2018: 8%, 2017: 6%, 2016: 3%)
- Enhancing advocacy programs (2018: 7%, 2017: 5%, 2016: 3%)
- Increasing meeting attendance (2018: 7%, 2017: 5%, 2016: 3%)
- Pricing / dues restructuring (2018: 6%, 2017: 4%, 2016: 3%)
- New product research and development (2018: 6%, 2017: 4%, 2016: 3%)
- Increasing participation among younger members (2018: 6%, 2017: 4%, 2016: 3%)
- Website enhancements (2018: 5%, 2017: 3%, 2016: 2%)
- Improving marketing results (2018: 4%, 2017: 2%, 2016: 1%)
- Governance changes (2018: 2%, 2017: 1%, 2016: 1%)
- Global / international growth (2018: 2%, 2017: 1%, 2016: 1%)
- Implementing / using digital marketing tools (2018: 1%, 2017: 1%, 2016: 1%)
- Student / young professional conversion (2018: 1%, 2017: 1%, 2016: 1%)
TOP PRIORITIES BY ORGANIZATION TYPE

**Professional**
- Generating non-dues revenue: 38%
- Developing new methods for member engagement: 31%
- Improving member retention: 26%

**Trade**
- Developing new methods for member engagement: 35%
- Enhancing advocacy programs: 28%
- Generating non-dues revenue: 28%

**Hybrid**
- Pricing / dues restructuring: 35%
- AMS / database upgrade / conversion: 30%
- Developing new methods for member engagement: 25%

TOP PRIORITIES BY FIELD/INDUSTRY

**Healthcare**
- Generating non-dues revenue: 38%
- Branding / increasing awareness: 32%
- Developing new methods for member engagement: 30%

**Scientific / Engineering**
- Generating non-dues revenue: 29%
- Developing new methods for member engagement: 29%

**Architecture / Construction**
- Generating non-dues revenue: 34%
- Developing new methods for member engagement: 23%
- Member segmentation to create personalized experience: 38%

**Education / Humanities**
- Generating non-dues revenue: 43%
- Developing new methods for member engagement: 43%

**Accounting / Finance / Insurance**
- Generating non-dues revenue: 36%
- Increasing participation among younger members: 36%
- Diversifying membership / attracting new audiences: 43%
- Developing new methods for member engagement: 43%

Total Responses: 149

Total Responses: 113
When considering the actions associations have taken in response to these priorities in 2017, we see a clear theme of expansion. Associations expanded programs and services in the search for non-dues revenue and overall portfolio diversification, and added staff, reorganized existing positions and sought outsource options to maximize resources and best deploy against organizational priorities. Further reinforcing the economic optimism detailed earlier in this report, few clients are anticipating negative changes such as layoffs/elimination of positions (15%) or salary freezes (10%) to occur in the near future.

WHAT DO YOU EXPECT TO HAPPEN AT YOUR ASSOCIATION IN 2018 BECAUSE OF CURRENT ECONOMIC CONDITIONS?

% Is happening now, definitely will happen and probably will happen

<table>
<thead>
<tr>
<th>Total Responses: 156</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expansion of programs and services</td>
</tr>
<tr>
<td>Addition of new positions</td>
</tr>
<tr>
<td>Staff reorganization</td>
</tr>
<tr>
<td>Outsourcing of staff function</td>
</tr>
<tr>
<td>Budget cuts</td>
</tr>
<tr>
<td>Change in investment strategy</td>
</tr>
<tr>
<td>Significant budget increases</td>
</tr>
<tr>
<td>Layoffs / elimination of positions</td>
</tr>
<tr>
<td>Hiring freeze</td>
</tr>
<tr>
<td>Reduction of programs and services</td>
</tr>
<tr>
<td>Acquisition</td>
</tr>
<tr>
<td>Freeze on salary increases</td>
</tr>
<tr>
<td>Merger / consolidation</td>
</tr>
</tbody>
</table>

Top Expectations (2017 EIA)
- Expansion of programs and services (61%)
- Addition of new positions (48%)
- Staff reorganization (34%)
- Outsourcing of staff function (33%)
Diversity, equity and inclusion (DE&I) are frequently cited in associations’ core values, mission and vision statements, and organizational priorities. However, research reveals a tendency among associations to identify DE&I efforts as a top organizational priority without implementing the specific strategies needed to advance this priority in a substantial way.

The 2018 EIA study included a focused exploration of current DE&I practices in the association landscape, presenting baseline benchmarks across sectors and organizations. These data points revealed a number of opportunities for the association sector to better align with best practices and deliver on its commitment to diversity and inclusion in the workplace.

As U.S. employers increasingly recognize the tangible bottom-line benefits of fostering diversity within the workplace, efforts to attract – and keep – diverse talent have been elevated from passive or discreet actions to a comprehensive strategy that advances diversity throughout the organization. Consistent with these broader trends, the respondents in the EIA study were likely to list the advancement of staff diversity and inclusion as an organizational priority. Further, association executives recognized the benefits of promoting diversity, with 72% indicating that attracting a greater breadth of talents, skills and experiences was a top expectation for enhancing DE&I efforts. However, the data indicated a gap in overall effectiveness of achieving diversity at the staff level: two thirds of respondents reported that increasing diversity among staff had been a priority over the past year, but only 62% of respondents indicated that they had been successful in achieving this priority.

The McKinley Perspective:

“Looking to external trends and practices in the broader marketplace, it is clear that simply articulating your commitment to diversity and inclusion is not sufficient to achieve the impact you seek, if not supported by a strategy that is grounded in evidence-based practices that involve every level of an organization, from entry level to C-suite. Often, we see ‘diversity’ emerge on a strategic plan as a priority workstream or as a core value, and while it is important to articulate the commitment your organization has to diversity, equity and inclusion, it’s even more critical to live this commitment through your hiring practices, membership strategies, brand story and partnerships. Staff and external stakeholders need to see, feel and experience a top-down commitment to promoting diversity through varied and meaningful tactics to achieve a culture that celebrates and attracts diverse staff talent and member cohorts.”

Jon Hockman, CPF, FASAE, Principal
HOW HAS INCREASING DIVERSITY AND INCLUSION AMONG STAFF AT YOUR ORGANIZATION BEEN PRIORITIZED OVER THE PAST 12 MONTHS?

Total Responses: 155

- The most important priority: 1%
- A top priority, but not the most important: 21%
- A priority, but not a top priority: 45%
- Not a priority at this time: 34%

PLEASE RATE YOUR LEVEL OF AGREEMENT OR DISAGREEMENT WITH THE FOLLOWING STATEMENTS:

Total Responses: 154

1. The staff employed by my association are at least as diverse as the industry or field the organization represents
   - Agree: 73%
   - Neutral: 7%
   - Disagree: 20%

2. My association has been successful in recruiting a diverse staff workforce
   - Agree: 62%
   - Neutral: 18%
   - Disagree: 21%

3. My association implements specific hiring practices and policies that are intended to foster a diverse staff
   - Agree: 41%
   - Neutral: 41%
   - Disagree: 18%

4. My association provides training, programs and/or other resources to ensure that staff are sensitive to people with different backgrounds, cultures and experiences
   - Agree: 39%
   - Neutral: 27%
   - Disagree: 34%

FOR WHICH OF THE FOLLOWING REASONS IS DIVERSITY AND INCLUSION A PRIORITY FOR YOUR ORGANIZATION? PLEASE SELECT ALL THAT APPLY.

Total Responses: 104

- To encourage a greater breadth of talents, skills and experiences within your organization: 72%
- Because it is the right thing to do: 65%
- To foster a more innovative and flexible culture within your organization: 61%
- To fulfill strategic or organizational goals: 39%
- To increase diversity within staff to mirror the industry or field your organization represents: 28%
- To boost the reputation of the organization within the industry or field your organization represents: 23%
- To fulfill member requests: 9%
When examining the specific actions taken to advance DE&I at the staff level, it is clear that stated priorities have not been fully translated into operational strategies. The implementation of an equal employment opportunity (EEO) policy was reported to be the most common strategy to advance diversity and inclusion among staff. While not required by law for all employers, this is increasingly seen as standard practice and a minimum threshold. Other common tactics to increase DE&I among staff – emphasizing benefits, such as a flexible work schedule, to attract diverse candidates in their job postings (46%) and using diverse sources for candidate recruitment (43%) – were similarly unlikely to affect significant change if not supported by internal efforts to sustain a diverse and inclusive culture in everyday operations.

A successful approach to diversity and inclusion seeks to remove barriers for prospective talent, demonstrates an organizational commitment to securing the most objectively qualified candidates and fosters a culture of inclusion at every level of the organization. However, in the association sector, active strategies to advance this goal, such as formal diversity trainings to management and staff, supporting diverse communities, and implementing mentoring programs and cross-training were among the least likely to be adopted.

WHICH OF THE FOLLOWING STRATEGIES HAS YOUR ASSOCIATION IMPLEMENTED TO INCREASE DIVERSITY AND INCLUSION AMONG STAFF? PLEASE SELECT ALL THAT APPLY.

Total Responses: 159

- Equal employment opportunity (EEO) policy: 72%
- Emphasizing details that will attract diverse candidates in job postings (e.g., flexible work): 46%
- Using diverse sources for candidate recruitment: 43%
- Visible EEO policy statements for all employees and potential candidates (e.g., website/hiring page): 37%
- Seeking employees’ opinions about diversity and inclusion: 34%
- Encouraging social accountability throughout the organization: 26%
- Providing training for managers on how to be inclusive leaders: 19%
- Supporting diverse communities within your region (e.g., sponsoring special events): 19%
- Offering formal diversity training: 14%
- Linking diversity management to other strategic initiatives: 14%
- Implementing mentoring programs and cross-training: 13%
- Using diverse suppliers for all business needs: 13%
Importantly, survey respondents seemed acutely aware that their organizations’ tactics had been unsuccessful in achieving the desired level of diversity, with nearly all respondents indicating that the adoption and promotion of EEO policies had resulted in minor or no impact (98% and 99%, respectively). Associations also recognized the relative effectiveness of more proactive strategies to advance DE&I, with management-level training and mentorship initiatives noted to hold the highest potential for major impact in improving DE&I at the staff level.

**IN TERMS OF INCREASING DIVERSITY AND INCLUSION AMONG STAFF AT YOUR ASSOCIATION, HOW MUCH OF AN IMPACT DO YOU THINK THE FOLLOWING INITIATIVES WOULD HAVE ON YOUR ASSOCIATION?**

Selections from previous question piped in

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Major Impact</th>
<th>Minor Impact</th>
<th>No Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing training for managers on how to be inclusive leaders</td>
<td>42%</td>
<td>46%</td>
<td>13%</td>
</tr>
<tr>
<td>Implementing mentoring programs and cross-training</td>
<td>36%</td>
<td>44%</td>
<td>21%</td>
</tr>
<tr>
<td>Using diverse sources for candidate recruitment</td>
<td>33%</td>
<td>47%</td>
<td>20%</td>
</tr>
<tr>
<td>Linking diversity management to other strategic initiatives</td>
<td>32%</td>
<td>47%</td>
<td>21%</td>
</tr>
<tr>
<td>Encouraging social accountability throughout the organization</td>
<td>31%</td>
<td>51%</td>
<td>18%</td>
</tr>
<tr>
<td>Emphasizing details that will attract diverse candidates in job postings (e.g., flexible work schedule)</td>
<td>30%</td>
<td>56%</td>
<td>14%</td>
</tr>
<tr>
<td>Seeking employees opinions about diversity and inclusion</td>
<td>27%</td>
<td>53%</td>
<td>20%</td>
</tr>
<tr>
<td>Offering formal diversity training</td>
<td>24%</td>
<td>59%</td>
<td>17%</td>
</tr>
<tr>
<td>Supporting diverse communities within your region (e.g., sponsoring special events)</td>
<td>10%</td>
<td>44%</td>
<td>46%</td>
</tr>
<tr>
<td>Using diverse suppliers for all business needs</td>
<td>7%</td>
<td>52%</td>
<td>41%</td>
</tr>
<tr>
<td>Equal employment opportunity (EEO) policy</td>
<td>6%</td>
<td>54%</td>
<td>44%</td>
</tr>
<tr>
<td>Visible EEO statements for all employees and potential candidates (e.g., website/hiring page)</td>
<td>2%</td>
<td>37%</td>
<td>28%</td>
</tr>
</tbody>
</table>
These findings reveal opportunities to improve DE&I efforts among associations in general, which can be further explored by sector to isolate trends and identify leaders in the marketplace. At a high-level, analysis indicated that:

- **Accounting/ Finance/ Insurance** associations fell behind other sectors in terms of staff diversity levels, but were most likely to have a diversity task force and more likely to implement diversity education sessions related to the profession than most other sectors.

- **Architecture/ Construction** associations reported success in recruiting a diverse staff, but few had member-based diversity initiatives. However, they were more likely than associations in other sectors to track membership diversity levels and utilize diverse sources in candidate recruitment.

- **Education/ Humanities** associations were well ahead of the curve on both staff and member-based diversity and inclusion efforts. Associations in this sector were the most likely to report that they employ a diverse staff, and efforts to promote DE&I were evident in widely-adopted, action-oriented tactics related to hiring practices and staff training.

- **Healthcare** associations reported employing a diverse staff, although this sector was less likely to indicate utilizing targeted hiring practices or trainings to attract and promote diversity at the staff level. Further, few had member-based diversity initiatives.

- **Scientific/ Engineering** associations demonstrated alignment with overall DE&I trends, with the majority of scientific and engineering associations reporting that they have a diverse staff. However, fewer efforts were made to promote diversity among membership.

### Case Study: Professional Engineering Society Turns DE&I Values into Action

A professional engineering society serving approximately 35,000 collegiate and professional members is committed to diversity and inclusion. McKinley facilitated strategic planning discussions to help the society bring its DE&I priorities to the forefront of its strategy, developing a dedicated DE&I goal and metrics-based indicators of success instead of infusing DE&I content more passively through other goal areas. Further, this society has appointed a “Special Director on Diversity” to its Board to ensure all Board-level strategy discussions are considered through a DE&I lens, while also offering DE&I training modules to its members and leaders. The association has decided that its race and gender goals should first mirror the profession to help narrow membership and volunteer audience targets in the near-term, with the long-term goal of impacting the overall diversity composition of the profession at-large through effective advocacy and workforce development efforts.

Learn more about McKinley’s experience in strategic guidance here.
CLOSING THOUGHTS: What it Means to “Accelerate”

It’s clear from the 2018 EIA results and other trends we have observed in the association space that while the economy remains healthy, political and industry instability bring other challenges and concerns to the forefront for association executives. Changes in organizational priorities and actions underscore that legacy programs, models and structures are under increased scrutiny – suggesting seismic changes related to value delivery are on the horizon for many associations.

So, where do we go from here? Change is not easy in the association space; emotion, self-interest, resources or lack thereof, complicated governance structures and history are all considerations that underpin what may seem like more practical business and investment decisions. But, from our experience, if you can unlock the key to your association’s value, the answers to change, growth and relevance will follow.

The Value Equation: Where to Start

Unpacking an organization’s value equation became one of McKinley’s most common projects from 2017-2018. Organizations frequently come to us thinking they had a “dues problem” or an “awareness gap” that was underpinning less than desired results, such as stagnant growth, member churn or difficulty attracting new member generations/demographics. Yet the “dues” or “messaging” hypothesis for these performance challenges is not always accurate, as more often than not the root of an association’s challenge is in its core value proposition. This diagram illustrates a high-level approach to honing in on the essential question of value in the quest for continued growth and success.
>>> APPENDIX I: Benchmarking Profiles

The following pages provide an “at a glance” view of the state of different association cohort groups – by sector, by organizational type, by budget size – as a benchmarking tool.
Accounting, Finance and Insurance

Accounting/Finance/Insurance associations as a sector have yet to reach pre-2009 membership numbers and were more likely than other sectors to report worse-than-expected (21%) economic impact in 2017. Looking ahead, they expressed moderate levels of increased economic optimism in 2018 compared to other sectors relative to their association (29%) and industry (26%). Associations in this sector experienced an 11-point increase in annualized five-year membership trends from 2017 to 2018, which provides reassurance for a future of continued sector growth.

**2017 Economic Impact**

- Better than expected: 21%
- About what was expected: 57%
- Worse than expected: 21%

**Future Outlook**

<table>
<thead>
<tr>
<th></th>
<th>Association</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>More concerned</td>
<td>14%</td>
<td>57%</td>
</tr>
<tr>
<td>About the same</td>
<td></td>
<td>29%</td>
</tr>
<tr>
<td>More optimistic</td>
<td></td>
<td>29%</td>
</tr>
</tbody>
</table>

**Member Retention**

- 90% or higher: 28%
- 80 – 89%: 64%
- Lower than 80%: 7%

Accounting, finance and insurance representatives reported the highest retention rates compared to other sectors and fell well above associations overall (45% overall reporting 90% retention rate or higher).

**Top Priorities**

- Increasing participation among younger members: 36%
- Diversifying membership / attracting new audiences: 43%
- Developing new methods for member engagement: 43%

**2018 Expectations**

- 86% Expansion of programs and services
- 77% Addition of new positions
- 54% Staff reorganization

While accounting, finance and insurance associations fell behind other sectors in terms of staff diversity levels, they were the most likely to have a diversity task force, indicating that member-based initiatives are in place.

**Staff Diversity Initiatives**

- 57% Staff is as diverse as the industry
- 57% Successful in recruiting a diverse staff
- 43% Hiring practices intend to foster diversity
- 21% Provide staff diversity training

**Member Diversity Initiatives**

- 79% Have a diversity task force
- 43% Provide diversity education sessions
- 29% Track membership diversity levels
- 21% Provide member diversity training
- 14% Offer resources in different languages

*Based on McKinley’s Economic Impact on Associations 2018 survey data from 12 accounting/finance/insurance association representatives.*
Architecture and construction representatives largely reported positive economic conditions in 2017, and feel more optimistic than other sectors about the impact of the economy on both their association and the industry-at-large.

**2017 Economic Impact**
- Better than expected: 62%
- About what was expected: 31%
- Worse than expected: 8%

**Future Outlook**
- Association:
  - More concerned: 38%
  - About the same: 38%
  - More optimistic: 24%
- Industry:
  - More concerned: 15%
  - About the same: 0%
  - More optimistic: 62%

**Member Retention**
- 90% or higher: 50%
- 80 - 89%: 33%
- Lower than 80%: 17%

Architecture and construction associations reported higher retention rates than associations overall (45% reporting a retention rate of 90% or higher).

**Top Priorities**
- Developing new methods for member engagement: 23%
- Generating non-dues revenue: 38%

**2018 Expectations**
- 100% Expansion of programs and services
- 54% Staff reorganization
- 54% Outsourcing of staff function
- 54% Change in investment strategy

While architecture and construction representatives reported success in recruiting a diverse staff, few had member-based diversity initiatives. However, they were more likely than associations in other sectors to track membership diversity levels.

**Staff Diversity Initiatives**
- Staff is as diverse as the industry: 67%
- Successful in recruiting a diverse staff: 67%
- Hiring practices intend to foster diversity: 42%
- Provide staff diversity training: 42%

**Member Diversity Initiatives**
- Track membership diversity levels: 67%
- Have a diversity task force: 23%
- Provide diversity education sessions: 23%
- Offer resources in different languages: 23%
- Provide member diversity training: 23%
While education and humanities representatives did not report any worse-than-expected economic impact in 2017, they expressed the highest levels of concern for the future of both their association and the field they represent.

**2017 Economic Impact**
- Better than expected: 36%
- About what was expected: 64%
- Worse than expected: Not applicable

**Member Retention**
- 90% or higher: 28%
- 80 - 89%: 35%
- Lower than 80%: 35%

Education and humanities associations reported the lowest retention rates and fell below associations overall (45% reporting a retention rate of 90% or higher).

**Top Priorities**
- Improving member retention: 50%
- Generating non-dues revenue: 43%
- Developing new methods for member engagement: 43%

**2018 Expectations**
- Expansion of programs and services: 86%
- Staff reorganization: 62%
- Budget cuts: 46%
- Change in investment strategy: 46%

Education and humanities associations are well ahead of the curve in terms of their reported staff and member-based diversity and inclusion efforts.
Healthcare association representatives largely reported that economic impact on their association in 2017 was better than or as expected, and feel more concerned about the economy’s impact on the healthcare industry-at-large than on their association specifically.

### 2017 Economic Impact

- Better than expected: 39%
- About what was expected: 47%
- Worse than expected: 13%

### Future Outlook

- Association:
  - More concerned: 28%
  - About the same: 39%
  - More optimistic: 33%

- Industry:
  - More concerned: 56%
  - About the same: 47%
  - More optimistic: 15%

### Member Retention

- 90% or higher: 40%
- 80 – 89%: 32%
- Lower than 80%: 28%

Retention rates fell slightly below associations overall, with 45% of survey respondents reporting a retention rate of 90% or higher.

### Top Priorities

- Generating non-dues revenue: 38%
- Developing new methods for member engagement: 30%
- Branding / increasing awareness: 32%

### 2018 Expectations

- Expansion of programs and services: 62%
- Addition of new positions: 42%
- Staff reorganization: 49%

While healthcare association representatives reported employing a diverse staff, few reported member-based diversity initiatives.

### Staff Diversity Initiatives

- Staff is as diverse as the industry: 72%
- Successful in recruiting a diverse staff: 69%
- Provide staff diversity training: 36%
- Hiring practices intend to foster diversity: 33%

### Member Diversity Initiatives

- Track membership diversity levels: 37%
- Have a diversity task force: 36%
- Offer resources in different languages: 22%
- Provide diversity education sessions: 19%
- Provide member diversity training: 14%
Nearly all scientific and engineering representatives reported that 2017 economic impact was better than or about what they expected. Looking to the future, they express slightly more concern about the economy’s impact on their association than on the industry.

**2017 Economic Impact**
- Better than expected: 37%
- About what was expected: 57%
- Worse than expected: 6%

**Future Outlook**
- Association:
  - More concerned: 32%
  - About the same: 26%
  - More optimistic: 47%
- Industry:
  - More concerned: 47%
  - About the same: 51%
  - More optimistic: 21%

**Member Retention**
- 90% or higher: 37%
- 80 - 89%: 28%
- Lower than 80%: 35%

Retention rates fell below associations overall, with 45% of survey respondents reporting a retention rate of 90% or higher.

**Top Priorities**
- Generating non-dues revenue: 34%
- Strategic Planning: 29%
- Developing new methods for member engagement: 29%

**2018 Expectations**
- Expansion of programs and services: 62%
- Addition of new positions: 62%
- Staff reorganization: 45%

Consistent with overall trends, the majority of scientific and engineering associations reported that they have a diverse staff. However, fewer efforts were made to promote diversity among membership.

**Staff Diversity Initiatives**
- 76% Staff is as diverse as the industry
- 59% Successful in recruiting a diverse staff
- 47% Provide staff diversity training
- 41% Hiring practices intend to foster diversity

**Member Diversity Initiatives**
- 44% Have a diversity task force
- 41% Track membership diversity levels
- 32% Provide diversity education sessions
- 24% Offer resources in different languages
- 12% Provide member diversity training

Based on McKinley’s Economic Impact on Associations 2018 survey data from 35 scientific/engineering association representatives.
Professional Associations

Professional association representatives were slightly more likely to report better-than-expected economic impact in 2017 compared to hybrid and trade associations as well as associations overall.

However, professional associations reported lower retention rates than associations overall (45% reporting 90% or higher) and have experienced a net decrease in retention over the past year.

While the majority of professional association representatives reported that increasing diversity and inclusion among staff was a priority, less than half had member-based diversity initiatives in place.

Based on McKinley’s Economic Impact on Associations 2018 survey data from 94 professional association representatives.
Hybrid Associations

While the majority of hybrid association representatives reported that economic impact on their association in 2017 was better than or as expected, they were more likely than professional and trade associations to indicate they experienced worse-than-expected conditions.

### 2017 Economic Impact

<table>
<thead>
<tr>
<th>Economic Retention</th>
<th>Better than expected</th>
<th>About what was expected</th>
<th>Worse than expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>32%</td>
<td>21%</td>
<td>47%</td>
</tr>
</tbody>
</table>

- **Top Priorities**
  - Pricing / dues restructuring: 35%
  - AMS / database upgrade / conversion: 30%
  - Developing new methods for member engagement: 25%

Hybrid association retention rates fell slightly lower than associations overall (45% reporting 90% or higher). However, they experienced positive trends in retention over the past year.

### Member Retention Rate

<table>
<thead>
<tr>
<th>Retention Rate</th>
<th>90% or higher</th>
<th>80 - 89%</th>
<th>Lower than 80%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>37%</td>
<td>27%</td>
<td>37%</td>
</tr>
</tbody>
</table>

- **Retention Trend in Past Year**
  - 37% Retention rate has increased
  - 16% Retention rate has decreased

Increasing diversity and inclusion among staff was less of a priority for hybrid associations than for professional and trade associations. However, hybrid association representatives reported more member-based diversity efforts than trade associations.

### Increasing D&I Among Staff

- Not a priority at this time: 42%
- A priority, but not a top priority: 32%
- A top priority or the most important priority: 26%

### Member Diversity Initiatives

- Track membership diversity levels: 39%
- Have a diversity task force: 27%
- Provide diversity education sessions: 26%
- Offer resources in different languages: 16%
- Provide member diversity training: 11%

Based on McKinley’s Economic Impact on Associations 2018 survey data from 20 hybrid association representatives.
Trade Associations

While trade association representatives largely reported positive economic conditions in 2017, they were slightly less likely than professional associations to report better-than-expected conditions.

Not surprisingly, trade associations reported much higher retention rates than professional and hybrid associations, and have continued to experience positive trends in the past year.

Increasing diversity and inclusion among staff was more of a priority for trade associations than for professional and hybrid associations. However, trade associations fell behind other associations in implementing member-based diversity efforts.

Based on McKinley’s Economic Impact on Associations 2018 survey data from 49 trade association representatives.
While associations with a national scope largely reported that economic impact on their association in 2017 was better than or about what they expected, they were slightly more likely than international representatives to report worse-than-expected impact.

### 2017 Economic Impact

<table>
<thead>
<tr>
<th>Economic Retention</th>
<th>13%</th>
<th>47%</th>
<th>40%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better than expected</td>
<td>40%</td>
<td>13%</td>
<td>47%</td>
</tr>
<tr>
<td>About what was expected</td>
<td>40%</td>
<td>13%</td>
<td>47%</td>
</tr>
<tr>
<td>Worse than expected</td>
<td>40%</td>
<td>13%</td>
<td>47%</td>
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</table>

National associations reported strong member retention rates, and were more likely to indicate that retention rates over the past year had increased than decreased.

### Member Retention Rate

<table>
<thead>
<tr>
<th>Retention Trend in Past Year</th>
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</thead>
<tbody>
<tr>
<td>28% Retention rate has increased</td>
</tr>
<tr>
<td>20% Retention rate has decreased</td>
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</tbody>
</table>

National associations fell behind international associations as well as associations overall (36%) with tracking membership diversity levels.

### Member Diversity Initiatives

<table>
<thead>
<tr>
<th>Track membership diversity levels</th>
<th>31%</th>
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</thead>
</table>

Based on McKinley’s Economic Impact on Associations 2018 survey data from 71 national association representatives.
Associations with an international scope experienced positive conditions in 2017, and were less likely than national associations (13%) and associations overall (11%) to indicate a worse-than-expected economic impact.

### 2017 Economic Impact

- **Better than expected**: 54%
- **About what was expected**: 39%
- **Worse than expected**: 8%

International association retention rates fell slightly below associations overall (45% reporting 90% or higher), and respondents reported a very slight net increase in retention rate over the past year.

### Member Retention Rate

- **90% or higher**: 40%
- **80 – 89%**: 26%
- **Lower than 80%**: 34%

### Retention Trend in Past Year

- **21% Retention rate has increased**
- **20% Retention rate has decreased**

International associations were slightly ahead of the curve with tracking diversity levels among membership (compared to 36% of associations overall).

### Member Diversity Initiatives

- **41% Track membership diversity levels**

Based on McKinley’s Economic Impact on Associations 2018 survey data from 83 international/global association representatives.
Budget: Less than $5 Million

While the majority of associations with a budget of less than $5 million reported that economic impact on their association in 2017 was better than or as expected, they were slightly more likely than associations overall (11%) to indicate a worse-than-expected economic impact.

2017 Economic Impact

- Better than expected: 46%
- About what was expected: 15%
- Worse than expected: 39%

Reported retention rates fell slightly below associations overall (45% reporting 90% or higher). However, associations with a budget of less than $5 million experienced positive trends in retention over the past year.

Member Retention Rate

- 90% or higher: 40%
- 80 – 89%: 38%
- Lower than 80%: 22%

Retention Trend in Past Year

- 32% Retention rate has increased
- 19% Retention rate has decreased

Associations with a budget of less than $5 million were less likely to prioritize both staff and member-based diversity and inclusion efforts compared to associations overall.

Increasing D&I Among Staff

- Not a priority at this time: 40%
- A priority, but not a top priority: 40%
- A top priority or the most important priority: 20%

Member Diversity Initiatives

- Track membership diversity levels: 27%
- Have a diversity task force: 24%
- Provide diversity education sessions: 22%
- Offer resources in different languages: 12%
- Provide member diversity training: 10%

Based on McKinley’s Economic Impact on Associations 2018 survey data from 54 association representatives from organizations with a budget less than $5M.
**Budget: $5 - $19.9 Million**

Associations with a budget between $5 million and $19.9 million largely reported that economic conditions in 2017 were better than or about what they expected.

### 2017 Economic Impact

- Better than expected: 52%
- About what was expected: 12%
- Worse than expected: 36%

Retention rates fell slightly above associations overall (45% reporting 90% or higher). However, respondents reported no net increase in retention rate over the past year.

### Member Retention Rate

- 90% or higher: 47%
- 80 – 89%: 31%
- Lower than 80%: 21%

### Retention Trend in Past Year

- 19% Retention rate has increased
- 19% Retention rate has decreased

Associations with a budget between $5 million and $19.9 million were less likely to prioritize both staff and member-based diversity and inclusion efforts compared to associations overall.

### Increasing D&I Among Staff

- Not a priority at this time: 38%
- A priority, but not a top priority: 43%
- A top priority or the most important priority: 19%

### Member Diversity Initiatives

- Have a diversity task force: 48%
- Track membership diversity levels: 32%
- Provide diversity education sessions: 32%
- Offer resources in different languages: 24%
- Provide member diversity training: 11%

Based on McKinley’s Economic Impact on Associations 2018 survey data from 734 association representatives from organizations with a budget between $5 - 19.9M.
Budget: $20 Million or More

Associations with a budget of $20 million or more reported stronger economic conditions in 2017 than associations with smaller budgets, most commonly reporting a better-than-expected impact.

**2017 Economic Impact**

- Better than expected: 45%
- About what was expected: 50%
- Worse than expected: 5%

While associations with large budgets reported strong retention rates overall, they experienced a net decrease in retention rate over the past year.

**Member Retention Rate**

- 90% or higher: 45%
- 80 – 89%: 30%
- Lower than 80%: 24%

**Retention Trend in Past Year**

- 17% Retention rate has increased
- 29% Retention rate has decreased

Not surprisingly, associations with a budget of $20 million or more are more likely than associations with smaller budgets to report that staff diversity is a priority, and are ahead of the curve in tracking membership diversity levels.

**Increasing D&I Among Staff**

- Not a priority at this time: 17%
- A priority, but not a top priority: 54%
- A top priority or the most important priority: 9%

**Member Diversity Initiatives**

- Track membership diversity levels: 57%
- Have a diversity task force: 51%
- Provide diversity education sessions: 34%
- Offer resources in different languages: 31%
- Provide member diversity training: 26%

Based on McKinley’s Economic Impact on Associations 2018 survey data from 39 association representatives from organizations with a budget over $20M.
**APPENDIX II: Respondent Profile**

WHICH OF THE FOLLOWING MOST CLOSELY DESCRIBES YOUR POSITION WITHIN YOUR ORGANIZATION?

- **Executive Director / CEO**: 37%
- **Managing Director / Senior Director**: 14%
- **Other C-Suite (COO, CFO, CMO)**: 14%
- **Director**: 12%
- **Senior Vice President / Vice President**: 12%
- **Manager**: 6%
- **Associate Executive Director / Deputy CEO**: 3%
- **Coordinator**: 1%
- **Other**: 1%

WHICH OF THE FOLLOWING BEST DESCRIBE YOUR AREAS OF RESPONSIBILITY? PLEASE SELECT ALL THAT APPLY.

- **Executive Management**: 47%
- **Board / Governance**: 44%
- **Strategic Development / Planning / Alliances**: 43%
- **Membership**: 35%
- **Operations / Administration**: 33%
- **Marketing**: 24%
- **Finance / Accounting**: 22%
- **I.T. / Technology**: 18%
- **Development / Fundraising**: 18%
- **Communications / Public Relations**: 18%
- **Human Resources**: 16%
- **Education / Professional Development**: 14%
- **Meetings and Expositions**: 11%
- **Research**: 10%
- **Publications**: 9%
- **Government Affairs / Relations**: 9%
- **Component Relations**: 9%
- **Other**: 5%
WHICH OF THE FOLLOWING BEST DESCRIBES THE ORGANIZATION YOU WORK FOR:

- Trade (mostly organizational members) - 28%
- Professional (mostly individual members) - 54%
- Hybrid (both organizational and individual members) - 11%
- Philanthropic / Cause Related - 4%
- Other - 3%

WHAT FIELD/INDUSTRY DOES YOUR ASSOCIATION REPRESENT?

- Healthcare - 23%
- Scientific/Engineering - 21%
- Education/Humanities - 9%
- Accounting/Finance - 7%
- Building/Construction - 5%
- Manufacturing - 4%
- Legal - 4%
- Architecture/Design - 4%
- Real Estate - 3%
- Energy/Utilities - 3%
- Transportation - 2%
- Sports/Leisure - 2%
- Insurance/Actuarial - 2%
- Hospitality/Tourism - 2%
- Government - 2%
- Food Industry - 2%
- Telecommunications - 1%
- Retail - 1%
- Research - 1%
- Association Management - 1%
WHAT IS YOUR ORGANIZATION’S GEOGRAPHIC SCOPE?

- International: 50%
- National: 43%
- State: 5%
- Regional/Local: 2%

WHAT IS YOUR ORGANIZATION’S ANNUAL OPERATING BUDGET?

- Less than $2 million: 13%
- $2 million to $4.9 million: 20%
- $5 million to $9.9 million: 19%
- $10 million to $19.9 million: 25%
- $20 million to $49.9 million: 13%
- $50 million to $99.9 million: 7%
- $100 million or more: 4%
APPENDIX III: Participating Organizations

AcademyHealth
AMDA - The Society for Post-Acute and Long-Term Care Medicine
American Academy of Hospice and Palliative Medicine
American Academy of Implant Dentistry
American Anthropological Association
American Association for Laboratory Animal Science
American Association of Colleges of Nursing
American Association of Physicists in Medicine
American Association of Post-Acute Care Nursing
American Association of Veterinary State Boards
American Bankers Association
American College of Prosthodontists
American Counseling Association
American Dental Association
American Dental Hygienists Association
American Institute of Aeronautics and Astronautics
American Institute of Architects
American Mathematical Society
American Ornithologists’ Union
American Orthopaedic Foot & Ankle Society
American Physical Therapy Association
American Society for Healthcare Engineering
American Society of Civil Engineers
American Society of Nephrology
American Society of Transplant Surgeons
American Staffing Association
American Water Resources Association
American Water Works Association
Arctic Research Consortium of the United States
ASHRAE, Inc.
Association for Corporate Growth
Association of Chamber of Commerce Executives
Association of College and Research Libraries
Association of College and University Housing Officers International
Research and Education Foundation
Association of Home Appliance Manufacturers
Association of Pediatric Hematology/Oncology Nurses
BOMA San Francisco
Casualty Actuarial Society
Club Management Association of America
Consumer Healthcare Products Association
CORFAC International
Council of Industrial Boiler Owners
Council on Undergraduate Research
Engineers Without Borders USA
Entomological Society of America
Equipment Leasing and Finance Association
Federation of American Societies for Experimental Biology
Georgia Society of Association Executives
Greater Cleveland Auto Dealers Association
Helicopter Association International
ICCP - The Society of Professional Associations in Computing
Illinois CPA Society
Institute of Electrical and Electronics Engineers
International Association of Assessing Officers
International Association of Movers
International Code Council
International Food Information Council
International Foodservice Distributors Association
International Sign Association
International Society on Thrombosis and Haemostasis
Kappa Delta Pi
L3 Organization
Lean Construction Institute
Legal Marketing Association
Mainstreet Organization of REALTORS
Massachusetts Association of REALTORS
Materials Research Society
Missouri State Teachers Association
National Active and Retired Federal Employees Association
National Archives Foundation
National Association for Family, School, and Community Engagement
National Association of Personal Financial Advisors
National Association of Tax Professionals
National Association of the Remodeling Industry
National Association of Theatre Owners
National Council of Architectural Registration Boards
National Foundation for Infectious Diseases
National Frame Building Association
National Golf Course Owners Association
National Institute of Building Sciences
National Investor Relations Institute
National Orientation Directors Association
National Restaurant Association
New York State Bar Association
Pediatric Nursing Certification Board
Pennsylvania Dental Association
Pennsylvania Institute of CPAs
Sleep Research Society
Society for Mining, Metallurgy & Exploration
Society for Neuroscience
Society of Fire Protection Engineers
Society of Manufacturing Engineers
Society of Petroleum Engineers
Society of Women Engineers
TESOL International Association
Textile Rental Services Association
The Ohio Society of CPAs
WateReuse Association
Wi-Fi Alliance