

# ASAE Foundation IGP Application

## A. Proposal Application

### Contact Info

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<input type="checkbox"/> Title/Position:	Executive Director
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Organization Website URL:	WSAE.org

### ASAE Member Info

<input type="checkbox"/> Name of ASAE member associated with this project:	David Baumann
<input type="checkbox"/> Email address of ASAE member associated with this project:	dbaumann@execinc.com

### Team Info (Optional)

1st Team Member Name:	Kristin Ouweneel, CAE
1st Team Member Email:	kouweneel@aaea.org
1st Team Member Organization:	Agricultural and Applied Economics Association

2nd Team Member Name:	<input type="text" value="Rebecca Brandt, CAE"/>
2nd Team Member Email:	<input type="text" value="rbrandt@isoqol.org"/>
2nd Team Member Organization:	<input type="text" value="International Society for Quality of Life Research"/>
3rd Team Member Name:	<input type="text" value="Benjamin Butz, CAE"/>
3rd Team Member Email:	<input type="text" value="bbutz@aamse.org"/>
3rd Team Member Organization:	<input type="text" value="American Association of Medical Society Executives"/>

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<b><input type="checkbox"/> Grant Mechanism (choose one):</b>	<input checked="" type="checkbox"/> Travel Award <input type="checkbox"/> Exploration Award <input type="checkbox"/> Hybrid Award
<b><input type="checkbox"/> Amount Requested:</b>	<input type="text" value="\$10,000.00"/>
<b><input type="checkbox"/> Organization Budget Size:</b>	<input type="text" value="\$190,858.00"/>
<b><input type="checkbox"/> Number of Employees:</b>	<input type="text" value="1 FTE"/>
<b><input type="checkbox"/> Tax Status:</b>	<input type="text" value="501(c)6"/>

**I affirm that the Organizational Representative, Executive Director, or Chief Executive Officer has approved the contents and submission of this application.**

I affirm  
 I do not affirm

## **B. Proposal Abstract**

**Brief description of project goals and objectives, plan of work, intended outcomes, and measures of success.**

There is evidence, suggesting irrespective of the current state of the economy and high unemployment, Wisconsin-based associations struggle to identify and recruit quality entry-level and early career professionals with the necessary skills, aptitude and desire to work in the association field.

This situation is exacerbated by the aging of the present association management workforce, many of whom will exit the field in the next five to ten years. We anticipate this demographic reality will result in significant workforce challenges for many if not most associations.

Unless we are successful in altering these circumstances in the face of a diminishing talent pool, associations will be limited in their ability to meet the service mission of their respective organizations. In response the Wisconsin Society of Association Executives (WSAE) has launched the Associations Advance Wisconsin (AAW) initiative, in part, to meet this challenge.

At present we see two barriers to success in expanding the association management talent pool both near and long term. The first is a lack of awareness of the association management profession as a viable and meaningful career option by secondary and post secondary students or displaced workers looking for new career opportunities. The second is a lack of curriculum direction at the post secondary level that students, interested in working in the association field, might follow to qualify them for entry level or early career positions.

Our intent is to eliminate these barriers through the development of a pilot program that partners WSAE and willing members with select post-secondary institutions of higher education.

The intent of the partnership is two-fold; create awareness on the part of guidance/career counselors and students to the opportunities and rewards of a career in association management and provide a pathway for interested students to acquire the skills and competency to be successful in entry level or early career association management positions.

The desired outcome of the pilot is a viable model to produce a right skilled talent pool to assume positions in Wisconsin Associations and association management companies.

Our long term goal would be to produce sufficient talent pool to successfully meet association human resource needs.

At present we know of no state society of association executives attempting such a strategy for workforce development.

## **C. Project Plan**

Detailed description of

- **OBJECTIVES, ORIGINALITY and SIGNIFICANCE:** plan objectives; significance of project and originality;
- **DESIGN, APPLICABILITY and TRANSFERABILITY:** methods for achieving plan objectives; desired outcome and method for evaluating plan objectives;
- **INNOVATION, IMPACT, and PRACTICALITY:** extent to which objectives address cost-savings, increased efficiency of internal processes and productivity, improved employee morale, enhanced customer satisfaction, clearer communication throughout organization. Impact and growth of innovation plan; market benefit; and potential impact

While Wisconsin associations face significant challenges with respect to the workforce availability or skill set mismatch, there are real opportunities to leverage current activity

and decisions at the state and local level in the areas of secondary and post-secondary education and workforce retraining.

One such opportunity is collaboration with Competitive Wisconsin, Inc. (CWI). CWI is a broad based, statewide initiative currently developing an education, workforce and economic development strategy for the next decade. We believe CWI provides a ready platform to create awareness of association contributions and value to a vital Wisconsin economy and the necessity to expand the association professional talent pool if that contribution is to continue. Resources such as the “Power of A” research and ASAE Operating Ratio Report and the Association Compensation and Benefits Report scaled to the Wisconsin association community can create a vivid picture of the value of associations to Wisconsin. Participation in CWI will enable WSAE to work for inclusion in the education and workforce development strategy and its implementation. This will also permit WSAE to gain access to and credibility with the thought and institutional leaders and policy makers who are attracted to or already engaged with Competitive Wisconsin, Inc.

Wisconsin association workforce needs over the next ten years are, in relative terms, small (estimate of 100 to 200 open association entry-level or early career positions per year) given the totality of identified professional and skilled workforce demands/ skill gaps in the state. When considering this reality we realize any presented strategy and set of tactics advanced by WSAE must be low risk and low investment in terms of time, attention and resources to be considered credible and meriting serious consideration at the institutional level.

However, we believe WSAE can demonstrate that a modest investment at the secondary and post-secondary level in an awareness campaign detailing career opportunities in the association field utilizing existing educational resources, can be created and made available to guidance and career counselors, students and displaced workers or those workers contemplating a career change.

We also believe we can demonstrate and deliver an innovative approach to creating and linking required association management “skills clusters” to existing course offerings utilizing a layered curriculum approach in the institutional setting. This would enable WSAE to endorse/certify an agreed-upon set of course offering as meeting entry level competency to work in the association field. This strategy can be adapted in form and function for use in both two and four-year academic institutions.

These institutional programs can link to associations willing to offer new hires or interns the opportunity to participate in some form of the recently launched ASAE Certificate in Association Management Program as a next step in a career path in association management. This strategy can be easily adopted by a two-year community college and a small or independent four-year college from design to launch in three years.

We would propose to offer this strategy and set of tactics as a pilot program in partnership with WSAE and participating associations to selected one two-year degree or certificate-granting institutions and four-year private or independent colleges. The goal would be to include one two-year and one four-year program in the pilot program.

Work product, templates and collaterals of this program would be made available to other State Societies of Association Executives for use by their association and its members if this project were to be funded by the ASAE Foundation.

## **D. Management Plan and Budget**

**Outline of proposed plan activities with related timelines; budget detailing allocation of grant to specific plan expense items, including justification.**

We believe the success of this initiative requires five areas of focus;

1. Development of a convincing case as to the value of associations to the economic vitality of the state and local communities.
2. Creation of an online association career profile, opportunity narrative, resource guide and other collaterals for secondary and post secondary guidance and career counselors and students.
3. Research and translation of necessary professional competencies required of association generalists into “skills clusters” that are easily understood by relevant leaders and curriculum and instruction decision makers of targeted educational institutions.
4. Pursue WSAE/institutional partnerships with one four-year and one two-year post secondary institution to research existing course offerings in order to develop a stacked curriculum of existing course offering to satisfy a mutually agreed upon curriculum that meets necessary core competencies for entry-level or early career association professionals.
5. Recruit a mix of four associations or AMCs to assist in the development and implementation of an association management ambassador and internship program. Participating organizations would be required to commit to a talent recruitment protocol coupled to a learning experience based on the ASAE Certificate Program in Association Management for interns and all new entry level hires within the first six months of hire.

The scope of work and attendant timeline of the WSAE AAW strategy is three years from initial research and program development to pilot launch. We envision an aggregate budget of an estimated \$30,000 in hard dollars as well as in-kind support.

We are seeking support in the first phase of activity in the form of an ASAE Foundation Innovation Grant in the amount of \$10,000. Of that total \$10,000 would be allocated to 115 hours of consultant services in one year for research and translational work detailed under Focus 3 and consultation with two-year and four-year post secondary institutions participating in the pilot program. In year two we would anticipate expending \$6,000.in consultant time to monitor and assess program development at the institutional level. The

consultant would be a PhD in curriculum and instruction with demonstrated experience in the required translational work and curriculum design.

An additional grant has been promised to fully fund this activity's total line item of \$16,000.

The funding of a trip for two AAW Task Force members to travel to Washington DC to meet with relevant ASAE and ASAE Foundation staff has also been secured.

We anticipate other required support will be realized through fund raising and in-kind support in years one through three.

Executive Director, Inc. has agreed to fund the travel expenses of one or more of its staff working on the WSAE AAW task force to attend and present at the 2013 ASAE Annual Meeting on the work product of the funded research and contribute to a program webinar.

The Foundation Grant working group is composed of a four person subset of the Associations Advance Wisconsin – AAW Task Force.

## **E. Organizational Profile**

**Brief description of organization, including industry type, resources available to support project objectives.**

### **ABOUT WSAE**

#### **Mission**

The mission of the Wisconsin Society of Association Executives (WSAE) is to serve as a forum where the association community thrives and grows.

## **Vision**

WSAE is the organization of choice for association innovation and leadership.

## **Values**

WSAE advances the following organizational values:

**Inclusion.** Diversity includes multiple stakeholders and perspectives in activities and decision processes

**Optimal performance.** Transparent, innovative and adaptive practices, using data-driven strategies to identify and provide member-centric initiatives

**Alliance building.** Collaboration and engagement with individuals and organizations that share common values

**Passion.** Excitement for the future and the potential for members and the profession

## **Commitment to Innovation**

WSAE is committed to these principles of innovation:

**Culture.** Develop and sustain cultures of innovation in the association community

**Process.** Develop and maintain an effective process for innovation that understands the needs of the community to help it thrive and grow

**Growth.** Experiment with new ideas and create an environment where self-directed professional growth can be best achieved

## **Core Competencies**

WSAE leverages these core competencies to advance our mission:

**Leadership.** Recognize the leadership potential of all generations and provide pathways to advance and assume leadership roles.

**Knowledge and Research.** Through a forum of professionals, provide learning and knowledge-building opportunities for members and the profession. Analyze, share and apply environmental information and successful practices in association management.

**Community and Impact.** Facilitate networking among diverse constituents to leverage business connections that enrich the profession. Drive positive change for constituents and broader communities.

## **F. Applicant Profile**

A biographical sketch for applicant (and each team member), including relevant expertise.

### **David Baumann, COO and Principal of Executive Director, Inc – EDI**

EDI is an association management firm headquartered in Milwaukee Wisconsin. EDI serves 25 national and global associations with a staff of 150 professionals.

### **Kristin Ouweneel, CAE, Executive Director of the Agricultural and Applied Economics Association - AAEA**

### **Rebecca Brandt, CAE, Executive Director of the International Society of Quality of Life Research – ISOQOL**

### **Benjamin Butz, CAE, Association Director of the American Association of Medical Society Executives – AAMSE**

Mr. Butz is the co-author of the ASAE Career HQ white paper, Through the Maze: Careers in Association Management. Ben received his Masters in Public Administration. He is certified as a grants performance manager from the Council for Nonprofit Innovation and is a graduate of the inaugural class of ASAE's Leadership Academy.