

Live and Learn

By Apryl Motley

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Picture yourself in a room with 19 other people contemplating your last day on earth and writing your eulogy. So begins Empower U's Leadership Awakening journey. You're probably thinking, who would sign up for that? According to Scott V. Black, CEO of Empower U, Inc., Fernley, Nevada, hundreds of corporate executives sign up every year. This referral-only workshop is limited to 20 participants and typically sells out months in advance. So why are Coca Cola, Frito Lay, and other major corporations sending their top executives to this intense, 2 ½-day program?

"Organizations realize that their biggest asset is the hearts and minds of people," says Black. "They are more open to investing in the whole person. When you improve the whole person, you improve performance." Black also notes that in today's constantly changing, competitive world executives are faced with marketing themselves as assets to the organizations they represent. This often means pursuing additional educational experiences to enhance their skills and market value. Add to that the decreasing *occupational half-life*--the rate at which an employee's knowledge and skills become obsolete--and it's no wonder that 92 million adults participated in formal educational activities in 2001.

So how attuned are you to the learning needs of members and staff? What priorities have you set to achieve your own professional development goals? This article takes a look at how some associations have approached lifelong learning as a strategic imperative for assisting members, staff, and senior management in keeping up with the rapidly changing environment.

Learning the landscape

Increasingly, access to learning is becoming synonymous with economic and professional success. According to the Economic Policy Institute, Washington, D.C., in 2003 people with college degrees earned 42 percent more an hour than those with only high school diplomas. "We are seeing a clear differentiation in wages and life changes between those who have skills and knowledge and those who are unskilled," says Pamela Tate, president and CEO of the Council for Adult and Experiential Learning, Chicago. "To achieve economic success, you have to participate in lifelong learning." CAEL's mission is to expand learning opportunities for adults by identifying effective practices and value-added services that improve their learning experiences and ultimately their professional growth. "Increasingly jobs require a higher level of skill and knowledge," says Tate. "Without learning opportunities, it will become more difficult for organizations to find qualified employees."

But gone are the days when graduating from a particular program meant that you had completed your education. Instead learning is a continual process, and it's not optional. "Lifelong learning has moved from being important to being critical," says William A. Draves, president of Learning Resources Network, River Falls, Wisconsin, an organization that helps associations, academic institutions, and government agencies provide the right learning opportunities for their various constituents.

Associations have long been in the business of providing education to members. The Institute of Management Accountants, Montvale, New Jersey, is no different. "Lifelong learning is part of our vision for the profession and the organization," says Paul A. Sharman, president and CEO of the institute. "We want to position IMA as the knowledge provider that management accountants rely on to stay current in their field." Adds Tina Turner, IMA's professional development consultant, "With technology and regulations moving so quickly, it's a challenge to stay current in your profession, but excelling means knowing how to analyze and interpret information to determine its value to your organization. As such, associations must be more attuned to changes and more willing to take on a larger role in educating their members."

Financial Executives International, Florham Park, New Jersey, couldn't agree more. In the wake of increased regulation, FEI has worked to help its members stay ahead of the learning curve. "We've had to keep up with the changing dynamics of the finance industry, particularly [the effects of] Sarbanes-Oxley and other regulations," explains Colleen Sayther Cunningham, FEI's president and CEO. "Our primary members are chief financial officers, and at least half are certified public accountants. So they are required to participate in continuing education." However, as the role of financial officers has changed, so have their learning needs. "The role of the CFO has shifted from bean counter to deal doer to strategic partner," she says. "Members come to us for learning opportunities that focus on both technical [skills] and soft skills such as leadership and management." To address the changing roles of CFOs and their need for more than technical skills, FEI's recent programs have included "People Skills: The Critical Component of Success" and "Communicating to Build Relationships."

Polishing your programs

If your current educational offerings are not keeping pace with increasingly complex job requirements and management challenges, take steps to find out what your members need and expect from your programs. While content is key, other program elements come into play as well.

Delivery. "I definitely see a trend where people expect resources to be online," says Tate. So "training offered by associations must continue to keep up"--such online access to resources and training generally save members time. Says Draves, "Time is much more valuable in the 21st century. People don't want to spend wasted moments listening to presentations."

In addition, technology has helped associations address two major considerations for members: convenience and cost. "We're offering more teleconferences and webcasts because technology makes it easier and cheaper for members to participate in our programs," says Cunningham.

FEI recently put a system in place that allows members to receive continuing

professional education credits for reading specific articles in the association's *Finance Executive* magazine, taking a quiz, and completing an evaluation online. FEI also provides a means for members to track their continuing education credits (awarded by other organizations as well as FEI) online using a program linked to the association's membership database.

Financial options. Today's learners may also need more flexible payment options than those traditionally offered by associations. According to Tate, only 6 percent of the U.S. workforce takes advantage of tuition assistance programs offered by employers. "The primary reason is that people have to pay in advance and wait for reimbursement," she says. "We encourage organizations to consider accepting vouchers or letters of credit and then bill the employer once the course is completed." Tate and her organization also advocate for lifelong learning accounts, which allow employees to save for professional development on a pre-tax basis (see sidebar, "[Banking on Learning](#)").

Content. In an era that requires ongoing education, many associations will need to "re-examine their relationship to the content that they provide," says Draves. "Associations used to offer their members information, but now information is useless. The *organization* of that information in a reasonable way--perhaps into a curriculum--is what members now value."

Learners also expect to play a larger role in shaping the content for educational programs that they attend. "Members play an integral role in developing content for our programs," says Cunningham. "This gives us a competitive advantage. We provide member-driven programs that offer our members content built by their peers."

FEI hosts an annual financial reporting conference that draws 800 attendees. To ensure alignment of programming with constituent demands, a 45-member technical committee made up of representatives from different industries develops the content for the conference. Currently, there is a waiting list to serve on the committee.

Further, members value more interactive learning experiences. "The programming methods of the 1980s and 1990s--conferences and seminars--are not effective today," says Sharman of the Institute of Management Accountants (IMA). "We are placing more emphasis on engaging people and having them interact with the content. For example, we've created online quizzes so that members can demonstrate their competency in specific areas." The objective is to put the learner in the driver's seat. "We want to get the content in their bones," adds professional development consultant Turner. "We have to provide quality learning experiences that members can integrate into their work. If most people do not use what they've learned within 30 days, they will get no benefit from the experience."

Scheduling flexibility. Traditionally most professional development courses are held during normal business hours, but associations may need to provide more flexible scheduling options. "The bottom line is, people want to learn how and when they want to," says Draves. Associations should be prepared to address these preferences by making programs available in the evening and on weekends.

Audience expansion. Tate recommends that associations take a broader approach to educational programming. "Typically, associations develop training for their

specific constituencies," she says. "They would benefit by making programs available to people outside their industry or profession." Tate suggests, for example, that associations can expand the audience for their educational programs through partnerships with colleges and universities.

Partner in program development. To make their educational offerings more diverse, associations may find it necessary to identify strategic partners to help them provide additional content or delivery methods. "Establishing strategic partnerships is a critical part of our strategy in providing education to members," says Sharman. "We don't believe we have to know it all. Instead we partner with universities and other organizations that can assist us in providing the best opportunities for our members."

An example of this is IMA's recently launched CMA Learning System, which is designed to help its members prepare for the Certified Management Accountant exam. Designed in partnership with the Holmes Corporation, Minneapolis, the system offers learners three learning options: self-directed, group, and college or university. "The response has been fantastic," says Turner. "The learning system is in broad use domestically as well as internationally in Europe and the Middle East. In addition, we've received extensive support from colleges and universities."

Educating employees

Addressing member education expectations may make it easier for associations to provide learning opportunities for their staffs as well. "Many organizations complain that they will spend too much money if they offer professional development plans to staff," says Tate. "But consider the costs of recruiting and training new staff. Providing opportunities for learning is less expensive than high turnover."

At the Council for Adult and Experiential Learning, 135 staff participate in the EDGE (Employee Development and Growth through Education) program. The program pays for tuition and career counseling, and the annual monetary benefit increases the longer an employee works at CAEL. Tate believes EDGE attracts prospective employees and retains current ones. "Educating staff is not an expense," says Tate. "It's an investment in the future of the organization."

The Institute of Management Accountants is in the process of developing individual learning plans for staff. Sharman notes, "An organization can only be as good as its staff is," and he won't let the association's budget deter him from the goal of making learning opportunities available. "Providing learning opportunities for staff doesn't have to be expensive," he says. "If you need to cut the budget, you get more innovative." For instance, IMA is launching an internal series called lunch and learn in which staff will share how others, to deliver on the organization's strategic goals, could leverage an aspect of their skills and experience. Sharman also supports staff in speaking at conferences, which he sees as another great vehicle for helping them to build an external community that can share ideas and experiences with them.

The professional development opportunities that Financial Executives International provides for its staff of 44 are highly individualized. For example, some staff members are pursuing their Certified Association Executive designations while others are working toward becoming Certified Public Accountants.

Group opportunities for learning also work well. "Recently, all staff participated in

Meyers-Briggs testing," says Cunningham. "We'll review the results as a team and see how we can work together better." FEI also offers learning lunches for staff featuring both internal and external speakers.

"Training for employees is key," she says. "People share their experiences with other staff so we all learn from them. It is vital that staff feel like they have the tools and opportunities to learn and advance. Spending money on training is worth more than simply the money it costs. It comes back in spades in higher morale and more productive employees."

Challenging CEOs

So you've invested in learning for members and staff, what about you? Many association CEOs acknowledge that they have little time for their own personal professional development. However, they recognize its importance, and some have found creative approaches to learning that benefit them and their staffs (see sidebars, "[Mixing It Up](#)" and "[Facing Challenges](#)").

"I am one of those people who has no time to attend formal [educational] programs," says Tate. "I attend sessions at conferences where I am speaking, but I learn most from individual coaching I receive from other senior executives and mentors."

However, Tate did find a way for her entire senior management team to learn as a group. They are participating in a customized leadership program designed by DePaul University, Chicago. During the six-month program, the team will complete a leadership development project that helps further CAEL's mission. DePaul's facilitators visit the association once a month to meet with the team. Team members also receive individual telephone coaching during the process. The total cost for the nine staff members participating is \$22,000.

Perhaps, your association can't afford a customized program. You can still make learning a personal priority. "I am responsible for both the human and technical aspects of the management accounting profession," says Sharman. "As such, 20 percent of my time must be spent in upgrading myself. I can't lead without knowing what's going on in the profession." Sharman spends a significant amount of time personally exploring different accounting practices both in the United States and abroad. During the past two years, he has been exploring German management techniques and has written a number of articles on the subject. Sharman says, "There is always so much to learn."

According to his December 2004 interview with *Business 2.0*, even Bill Gates takes off two weeks every year to do nothing but read about trends in technology. Can you afford not to make a similar investment in yourself?

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