



# User's Guide

*Designing Your Association's Journey into Foresight*

**BY MARSHA L. RHEA, CAE**

The authors have worked diligently to ensure that all information in this work is accurate as of the time of publication and consistent with standards of good practice in the general management community. As research and practice advance, however, standards may change. For this reason it is recommended that readers evaluate the applicability of any recommendations in light of particular situations and changing standards.

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## THE COMPLETE ACTION BRIEFS

Content, Learning, and Knowledge Action Set
Data and Technology Action Set
Demographics and Membership Action Set
Economic Conditions Action Set
Society and Politics Action Set
Workforce and Workplace Action Set

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## Welcome to ASAE ForesightWorks

The ASAE Foundation established ASAE ForesightWorks to be a deliberate, evidence-based research initiative that assists association professionals in environmental scanning and planning for change. The program provides a continual stream of research and resources to empower association leaders to create a culture of foresight in their organizations, leading to a vibrant culture of foresight across the association community. The program envisions a future in which association leaders not only are aware of potential changes ahead, but they are actively engaged with their organizational leadership, their staff, their members, and their peers to plan for and create opportunities from these changes.

Foresight is a critical component of business leadership, but foresight practice can add value and strategic insight to all levels and functional areas of association management. Foresight is not the same as “trends.” Trends knowledge is helpful but can only tell you what people are doing now—not what you may need to know to prepare for the future. The ASAE ForesightWorks research takes a longer view, identifying drivers of change that are or will be important to the future work of associations.

This user's guide will help you apply that research, taking you through three basic steps in designing your journey into foresight. The ideas, processes, and activities in this guide are grounded in a deep appreciation for how associations operate and the value they seek to create for members. The goal of this guide is to help you decide where you can get the best results for your association and members. You will learn how to scale foresight efforts up or down to support the priorities you choose and adopt processes and practices that fit your association's culture.

FIGURE 1. The Foresight Steps



To support the community's knowledge of potential changes, ASAE ForesightWorks offers a robust collection of action briefs that identify and explain the drivers of change. The action briefs convey concise and actionable information that can easily be used in a variety of foresight experiences. This user's guide will show you how to use these briefs to expedite your foresight efforts. See “ASAE ForesightWorks Resources” on page 2 for more information about available program materials.

This guide is designed to meet you where you are in your efforts to create a culture of foresight at your organization. If your association already practices foresight, you probably have some familiarity with foresight practices and processes. For you, reviewing this user's guide might point to additional opportunities to strengthen your efforts, and it may make sense to skip ahead to steps or practices that seem most relevant to your work. If you have little or no experience with foresight, it is recommended that you work sequentially through the guide.

Each of the guide's five sections offers advice, questions, checklists, and planning tools to facilitate designing your journey:

- 1. Step One: Initiating Foresight Practices.** This section will get you thinking like a futurist. It walks you through decisions about the purpose and rationale for your foresight efforts, helps you identify potential participants, and introduces processes you can use in your own practice.

- 2. Step Two: Conducting Foresight Research and Analysis.** This section covers the methodology and practices of scanning and forecasting. You will determine how to prioritize and work with the ASAE ForesightWorks action briefs to expedite your efforts.
- 3. Step Three: Applying Foresight.** This section will show you how to put foresight to work in your key strategic decisions through visioning, planning, and acting. These steps will help you determine how to make foresight a part of your ongoing association processes.
- 4. Planning Your Foresight Journey.** Once you understand the three steps of practicing foresight, it is time to decide how you will proceed. This section maps out three levels of engagement with potential activities: exploratory, engaged, and leading. To start you on this journey, you will find some counsel on overcoming resistance and how to effectively use futurists and other consultants.
- 5. Tools, Facilitation Guidance, and Resources.** To support your work, this section features some tools, tips, and resources to execute some of the recommended practices described in this guide.

Regardless of your experience with foresight, if you are reading this guide, you have already self-identified as a champion in establishing your association's foresight practices. Association leaders, staff, and volunteers all have roles in advancing foresight within an organization—and across an industry. Every journey starts with someone willing to identify and lead others to the right destination.

## ASAE ForesightWorks Resources

The original research identified 41 drivers of change important to associations. Each is described in an action brief that examines its implications and offers ideas for steps associations can take to respond to that driver of change. To help association professionals think through these drivers of change, ASAE ForesightWorks provides several resources:

- The ASAE ForesightWorks Complete Collection includes all 41 action briefs and a user's guide.
- ASAE ForesightWorks Action Sets allow you to explore six to eight drivers of change in a specific area of interest:
  - Content, Learning, and Knowledge
  - Data and Technology
  - Demographics and Membership
  - Economic Conditions
  - Society and Politics
  - Workforce and Workplace

Other resources guide you through the research and help you apply it in your organization:

- *Why Associations Need Foresight* is a research brief that introduces the program and suggests ways to think about and apply intelligence about drivers of change and conduct future-focused scanning on your own.
- A sample selection of three action briefs, free to ASAE members.

ASAE ForesightWorks uses a continuous scanning process. The drivers of change will be reviewed and updated as necessary—and new drivers of change added—on an annual basis. For more information, or to get these resources, visit [asaecenter.org/foresightworks](http://asaecenter.org/foresightworks) or contact ASAE Foundation research ([research@asaecenter.org](mailto:research@asaecenter.org) or 202.626.2753).

## Step 1: Initiating Foresight Practices

Foresight is a structured process for discerning, analyzing, and acting on potential futures. Foresight is a leadership competency with disciplined ways of thinking, a language, and processes that help followers envision the future and prepare to engage with it. Futures thinking is inquisitive, critical, and imaginative. Foresight language (see glossary) equips people with a consistent way of describing the attributes of different types of foresight information and understanding their usefulness in decision making. This user's guide will introduce processes you can use to responsibly guide your association's efforts.

Governments, businesses, communities, associations and other organizations practice foresight to strengthen their decision making and enhance their ability to shape a preferred future. Once you have defined your objectives, you can choose the most appropriate practices and methods to support your efforts.

Though you may have a clear vision for what you expect foresight will accomplish for your association, other association leaders may not. By defining and setting the objectives for foresight, you can keep the project scope manageable and set your association on the path toward a successful outcome.

Whether you simply sketch out a project outline or do a more formal project concept and scope to share with others, there are four elements to launching successful foresight practices that need to be accounted for:

- **Purpose.** Why do you need to learn about the future? In what ways do you intend to use findings and insights to support and advance your association?
- **Champions.** Who needs to be part of this process to secure understanding and buy-in for future plans and actions?
- **Creating a foundation.** How can you stoke curiosity about the future and provide sufficient knowledge and training to support your foresight efforts at any commitment level?
- **Processes.** What are the most time efficient and cost-effective ways to accomplish your objectives?

Thinking through these four factors will help you define the best way to begin or refine your foresight efforts.

The key to a fast start is an understanding of what distinguishes futures thinking. Futures thinking includes continuous reflection on and questioning of new information and what that information could mean for your work. You may already do this, but if this isn't your typical mode of thinking, it's very easy to start practicing today. Engage key stakeholders in your processes to model futures thinking and to dig deeper into potential answers to your questions.

Futures thinking is critical thinking:

- What evidence do I have to support what I am seeing? Are these reliable sources?
- How is this change related to other changes I am observing?
- How pervasive is this change? How quickly will it occur?
- What am I missing in my observations and analysis?

Futures thinking is inquisitive:

- What assumptions are required for this change to occur? Why might this change not happen?
- What will this change mean for me, my organization, and my members?
- What can I learn from how this change has affected others?

Futures thinking is imaginative:

- What possibilities does this change create for my organization?
- What can I do tomorrow that I could not do today?
- What alternative futures or scenarios are also possible?

At the outset of your journey into foresight, don't be daunted by any lack of knowledge or proficiency. In the next sections, you will learn specific foresight tactics you can use to become comfortable with the practice of foresight. The appendices include features models and samples you can adapt for your work.

## Define Your Purpose

*Why do I need to learn about the future? In what ways do I intend to apply findings and insights to support and advance my association?*

Foresight can be used to both inform your members about changes that might affect their future and guide your association's strategy and business decisions. In fact, these goals may overlap. Your members are as likely to be affected by aging, immigration and changing demographics, and new technologies as your association will be. However, your association's priorities might be different from those of your members in important ways. This user's guide will focus primarily on using the drivers of change to inform association decisions while showing you ways to apply the research and use various foresight practices and activities to help your members explore their future.

Associations can use foresight to support four important purposes:

1. To support strategic planning and strategy development.
2. To inform anticipatory learning.
3. To conduct risk analysis.
4. To inspire innovation and business development.

Let's look closely at each of these four purposes to determine who your participants should be and what processes you might want to follow.

**Strategic planning and strategy development.** Many associations have well-established practices around who participates in strategic planning. Ultimately, approving the strategic plan is the board's responsibility, although many boards delegate some or all plan development to senior staff, a volunteer committee, or a task force. Many forward-looking associations find ways to engage younger members in aspects of this process. If affiliates or chapters are a critical component of an association's structure and member service delivery, they too will have a role and voice in strategic planning.

As you look at your cast of players in the strategic planning process, you should consider how to engage them around the ASAE ForesightWorks drivers of change and other relevant foresight research. They are all potential participants in information sharing, strategic conversations, or other foresight exercises you might undertake in support of strategic planning and strategy development. For more guidance on using foresight in strategic planning and strategy development, refer to step three, "Applying Foresight," specifically the sections on visioning and planning how to achieve your vision.

The foresight challenge in strategic planning is to think long term. Commit to exploring at least a 10-year time horizon. Some changes, such as technology developments, will occur faster, while many demographic and social changes will play out over longer periods of time—at least until they reach a tipping point. Don't limit your preparation for strategic planning to some variation on a strengths, weaknesses, opportunities, and threats (SWOT) analysis. While SWOT analyses have definite value, by setting your time horizon out 10 or more years, you are able to explore a wider range of potential changes ahead. The earlier you can detect an opportunity, the easier it will be to plan how you can seize it.

**FIGURE 2. Foresight Applications for Associations**



**Anticipatory learning.** If you think your leaders will more highly value foresight for the association if they can see direct value for themselves, you may want to begin your foresight journey with anticipatory learning. Anticipatory learning is the study of trends, issues, and patterns of change to better prepare for future decisions and behaviors, especially in an environment of uncertainty and rapid change. Foresight-based learning can provide the context and opportunities to explore and even rehearse options for adapting to necessary change.

Your natural participants in anticipatory learning will be your pioneers and early adopters. These are your members who are drawn to change and want to be the innovators, guides, and teachers for others. Because members want to learn about new developments in their field or industry, the potential audience for foresight in a learning setting could be quite large. The ASAE ForesightWorks drivers of change provide prompts for framing education sessions or a series of informative articles and briefings. You may need to do additional research and analysis specific to your members' interests and possible responses, but this can be accomplished to some degree through peer-to-peer learning.

Anticipatory learning also can be a vital part of association staff's professional development. As new forms of work emerge, association professionals have a pressing need to keep their own knowledge and skills current. Given their expertise in different association functions and on-the-ground experiences with member needs and requests, staff can also be the best scouts for identifying changes ahead that could affect association operations or members.

**Risk analysis.** You probably monitor political and legal changes that could affect your association or industry, but are you also identifying future risks to your association's business model, your programs, and other operational factors? The greatest risk for leaders may be in refusing to acknowledge and plan for important and predictable changes.

While advocacy and membership staff are likely accustomed to scanning for potential risks related to their work, key participants in foresight-informed risk analysis also include leaders in finance, business operations, information technology, and communications functions—where urgent threats are likely to emerge. Considering the ASAE ForesightWorks drivers of change will help staff leaders examine potential risks and identify potential action steps, enabling executives to take thoughtful and actionable recommendations to the board.

Ultimately, association executives will need to draw their boards and key committees into developing and enacting the steps required to mitigate future risk. Not only is it part of their fiduciary responsibility to protect the association's future, but volunteer leaders will need to make informed decisions when approving significant budget changes or taking the association's business model in new directions.

**Innovation and business development.** Disrupt or be disrupted has become something of a maxim for business leaders. Major businesses use foresight to discover new opportunities for disruptive innovation and new markets. Associations can approach the drivers of change in the same way—to identify new capabilities or new services and programs for members. By imagining possibilities and challenges related to specific drivers of change, forward-thinking association professionals can design better futures for their members and stakeholders.

As opportunity can often be the upside of potential risk, staff involved in risk analysis are also strong candidates to engage foresight for innovation and business development. They can use foresight to drive "what if" sessions that take advantage of emerging needs and preferences.

If your objective is to create a new service or program, you will want to include subject matter experts from your membership in these innovation and design thinking sessions. Some of the same people taking the lead in anticipatory learning may also be great recruits to any innovation and business development efforts you undertake.

## Become a Champion and Recruit New Champions

*Who are the best champions and allies to create a team of leaders vested in practicing foresight?*

In *Good to Great*, Jim Collins posited that it might be better to focus first on “getting the right people on the bus” in an organization before creating a vision and strategy. You might find Collins’ suggestion useful in deciding how to start your foresight journey. Foresight requires champions willing to lead change, and change agents always need allies to turn the insights of foresight into action.

The most influential team of potential champions: a visionary chief elected officer bold enough to embrace the future partnered with a courageous chief staff executive persistent enough to transform the association. It is hard to beat this combination of foresight and fortitude. But foresight can be championed from any corner—and hopefully many corners—of an organization. If you are reading this user’s guide, you already are on your way to becoming a champion for foresight in your organization. The next section identifies other potential champions, as well as the foresight roles and opportunities they may be well-positioned to support.

In fact, demonstrating foresight can be an effective way to differentiate your style of leadership and management among a team of people devoted to everyday matters. Be sure that championing foresight augments the essential work of supporting current programs and services. Associations that can deliver value in today’s conditions are more likely to have the trust and discretionary funds to invest in future changes.

**Championing foresight as a chief elected officer.** Your peers and the association’s staff look to you for leadership. Within the parameters set by your association’s bylaws, values, and strategic plan, you have considerable latitude to shape the association’s annual priorities. You exercise this latitude when you shape meeting agendas, encourage strategic conversation, and speak on issues of concern in the field. You can bring foresight into all these acts of leadership. Whatever your association’s vision and goals, you will find drivers of change in ASAE ForesightWorks that could inform your future success.

As the chief elected officer, you play a critical role in engaging the association’s board in strategic planning and strategy development. You also ensure the board upholds its fiduciary responsibilities, and that does include making sure your association is doing risk analysis to identify potential problems. If you take an active interest in anticipatory learning, so will other association volunteer leaders and members.

**Championing foresight as a chief staff executive.** Quite often it is the chief staff executive who must be both visionary and change agent, especially when it comes to assessing changing needs within the organization. Your board may look to you and your staff team as intelligence gatherers—spotting critical news and information that matters to the association and keeping them current on new developments in association management.

You can stoke interest in foresight by sharing relevant news articles about changes you are monitoring. In every analysis of an issue or proposed project, you can include foresight-informed guidance about how future trends and events might unfold. You can use your board reports, annual reports or outlooks, and various speeches to share what you see on the horizon in areas of critical importance to the association. If you have the appetite for foresight, you have no shortage of opportunities to spread your enthusiasm throughout your association. You have the ability to apply foresight for all four purposes:

- Engaging your board in scanning for future trends and issues to inform strategic planning
- Analyzing your association’s programs and services against future risks
- Spotting areas where members could pursue anticipatory learning
- Innovating new programs and services and developing your association’s business to respond to emerging opportunities.

**Championing foresight from a staff role.** It is possible to champion foresight from any staff position within an association. As a staff person, you will have the best understanding of how different drivers of change will affect your work. Many of the drivers of change have specific implications for various functional areas and member services. You should not only be aware of these implications but also take on the critical role in helping leaders understand what it means for your organization's larger picture.

You can advance the cause of foresight in your organization by sharing trends and new developments in your area of responsibility or demonstrating that your plans and proposals have accounted for significant changes ahead. Staff who contribute to an association's content strategy (communication, publications, learning) have particularly powerful tools for supporting anticipatory learning among the members.

## Create the Foundation for Foresight Practices

*How can I develop the groundwork for a culture of foresight within my organization?*

Rather than launching a major initiative, sometimes the best way to introduce foresight practices into an organization is by stoking interest across the organization. This approach is especially useful if you are acting as champion from a staff role but is valuable for getting buy-in at every level. Once people understand the utility of what you are proposing, they will be more inclined to commit more effort to processes and activities and even seek additional training and assistance.

1. Share informative and provocative articles about future trends and issues. *Ask what could this mean for us?*
2. Share examples of what other associations are doing in foresight. *Ask could we do this?*
3. Explain how foresight could strengthen processes you already have in place, such as strategic planning or innovation. *Ask are we adequately anticipating the degree of change we might face?*
4. Assign people to scout for major trends and issues related to priorities to discuss at your next board or staff meeting. *Ask how could these changes increase or decrease our potential for success?*

## Deciding Where to Begin Your Foresight Journey

*Where should I focus my foresight efforts in my association to get early wins and strong results?*

Now that you are familiar with the key elements for initiating foresight practice, take a moment to consider how and in which order you might tackle these challenges. Change management experts counsel to look for and start with easy wins. Once you have some success, you can attempt more ambitious approaches.

Think about potential champions for your efforts. Will you need to be the champion, and if so, who will be your allies? Do they need to read this user's guide? Or can you save them time and effort by curating the most relevant elements for your situation?

Talking about the future is fun for many people. If you're the chief staff executive, perhaps your best option is to design your board's strategic conversations around a few select drivers of change. Or it might be easiest to introduce foresight into a process that people already support, such as strategic planning.

If you are facing a particular challenge, such as technology infrastructure or recruiting staff with the talents you need, addressing these challenges through a foresight-informed risk analysis could be an effective way to generate and make the case for innovative solutions and major investments. What association doesn't long for new sources of revenue or to future-proof its existing business model? If that is your priority, begin with using foresight to inform a more robust innovation and business development process.



However you choose to move forward, you can't go wrong also introducing foresight as anticipatory learning into your education programming. If your field is experiencing notable change related to your priorities, perhaps you begin to showcase what is changing and how members might respond through your conferences and publications. Members will appreciate that you are keeping them apprised of drivers of change.

However excited you might be about the potential to champion foresight and create a culture of foresight, you will be more successful if you focus your energies on early wins that prove the value of this kind of research and analysis. The worksheet on the next page will help you think through your options and put your efforts where they will yield the best results. As you move through this guide, you will be able to refine your choices by considering specific foresight experiences and activities at the exploratory, engaged, or leading levels of effort.



## Step 1: Initiating Foresight Practices

*Outline your approach to using foresight*

### Purpose

☐ Strategic planning/strategy development   ☐ Risk analysis   ☐ Anticipatory learning   ☐ Innovation and business development

### Your Rationale

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### Processes

*Existing processes to be enhanced?*

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*New activities to introduce?*

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*First steps?*

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### Champions

*Roles*

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*Assets & Strengths*

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*Other Important Participants*

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### Preparation and Training

*Ways I can encourage thinking like a futurist?*

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*Ways I can stoke interest in foresight?*

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*Elements to share from this guide?*

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*Other resources I could use?*

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## Step 2: Diving into Foresight Research

Foresight research and analysis can be time-intensive and require some proficiency in how to systematically scan extensive information to find and interpret relevant evidence of change. The ASAE ForesightWorks drivers of change action briefs help simplify this step by providing you with a resource to jumpstart your research. Some of these drivers of change could be priorities for your association; others may not be relevant to your situation.

This section will walk you through how to work with the action briefs to identify your priorities. You can learn even more by conducting your own foresight research and analysis. There are plenty of models out there, but if you are new to these processes, the ASAE ForesightWorks research provides an easily replicable model. The ASAE Foundation research is purposely broad enough to serve a wide range of associations, so you may need to do additional research and scanning to deepen your understanding about how these changes will unfold in your field or industry. You may also decide you need to explore areas of change that are specific to your members' interests.

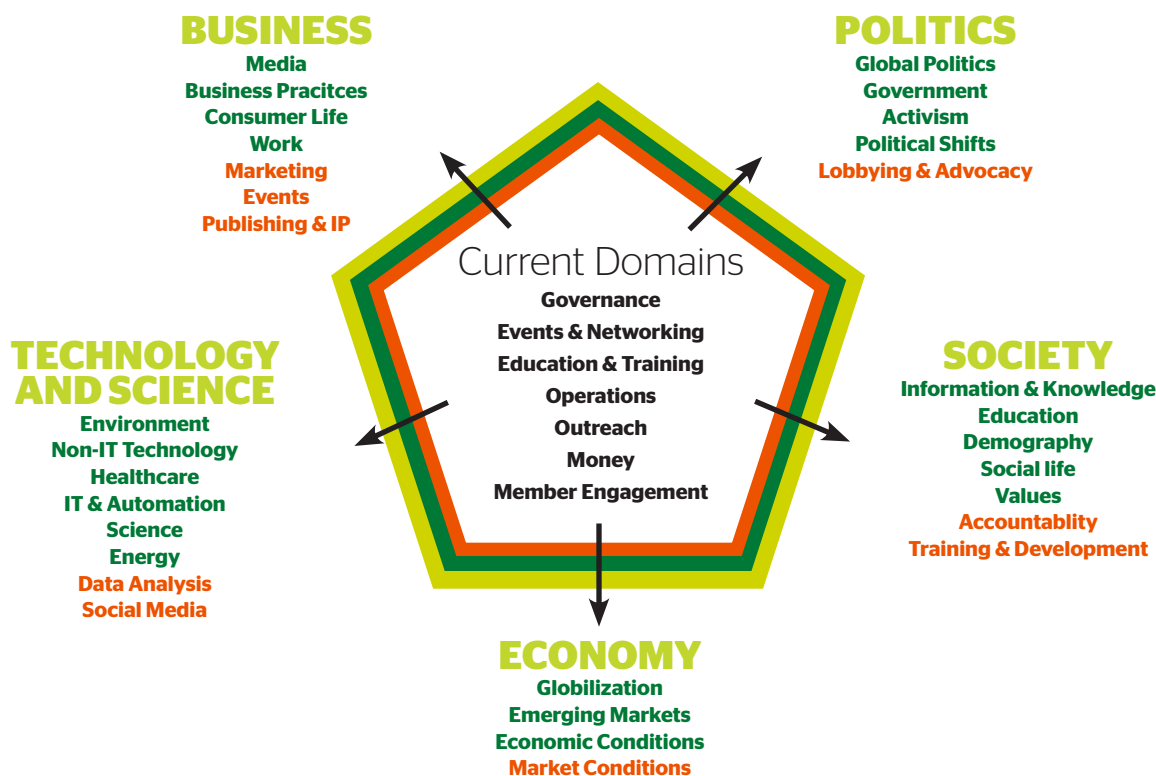
Regardless of whether you would like to do your own scanning or would like to explain the ASAE ForesightWorks methodology to your stakeholders, the steps outlined below are essential to foresight research.

### Scanning Methodology

*What are the key elements of a systematic scan?*

Scanning is the data-collection phase. Using a scanning framework will make your searching multifaceted and systematic. ASAE ForesightWorks started with the common scanning framework STEEP (social, technological, economic, environmental and political), then customized the framework to STEPB to ensure a closer look at business trends and issues affecting associations. Figure 3 lists the STEPB and domain areas that were used for the ASAE ForesightWorks research. Within the framework areas (around the outside in Figure 3), the Technology category was expanded to Technology and Science, moving environment into science. In the scanning framework and domain areas diagram, you can see how areas of scanning interest (in bright green) were further defined to focus on areas of potential importance to associations.

FIGURE 3. ASAE ForesightWorks STEPB Framework and Domain Areas



Your scanning framework might be customized to feature other areas of special interest to your industry or profession. For example, professional societies might focus more intensely on how knowledge is developed and people learn and advance in the field. Some trade associations may have a greater interest in economics than the environment. Social trends and issues may strike you as generally applicable, but you might need to customize categories like “the economy” or “politics” to reflect your members’ interests. If your association has a taxonomy for your content strategy or website, it might offer some insights into priorities for your scanning framework.

The ASAE ForesightWorks research is also guided by a domain map, which is a visual representation of a system in which change is being analyzed and shows factors in the system and how they relate to each other. The ASAE ForesightWorks domains (in black) identifies important functional areas for associations. If you do this on your own, you may want to substitute the terms you use to describe your key functional areas.

ASAE ForesightWorks also mapped areas that appear to be hot zones (in orange) for change within the association operating environment. These hot zones might be the most useful element. These categories act as a hypothesis about where you expect to discover important changes. Even if you are not planning to undertake an extensive scanning process, mapping your domain may help you identify your potential hot zones.

A scanning database is useful to efficiently organize and analyze your research. The ASAE ForesightWorks scanning database has more than 300 scanning references that are regularly refreshed. These references, called scanning hits, come from a variety of sources: news stories, journal articles, in-depth reports, social media, books, and websites.

But don’t get stuck thinking you need an extensive scanning database to back up your efforts. You truly can start with two to three action briefs from ASAE ForesightWorks and achieve useful results. This might even be an advisable course of action before investing time in your own research. You will be in a much better position to judge how to scale up or down your efforts to match how your volunteer leaders and staff might use additional research.

## **The Art of Forecasting**

### *How do I make an informed judgment about the probable future?*

Forecasting is the art of making sense of what you have learned through scanning. Forecasting calls on your ability to critically analyze information, inquire into its significance, and imagine the potential futures that might occur. Forecasts can describe probable futures—what your informed analysis leads you to believe will happen—or they can be provocative forecasts designed to spur people to see how changes could interact in ways that create unexpected or challenging outcomes.

Forecasts are the byproducts of sense making, but they are not predictions. No matter how thorough your scanning and forecasting might be, the future will still hold surprises. Futurists call these surprises wild cards and argue about whether observant people could have detected these developments and events. Create and use forecasts fully aware that sometimes the future will veer in unexpected directions. This does not diminish the forecasts’ value in sense making.

You will find forecasts in the ASAE ForesightWorks research briefs. They are informed assumptions about what might occur. Use them to shape and test your own assumptions. What else could you see happening, particularly within your own industry? Ultimately, you should arrive at your own forecasts and use them to inform your planning and action decisions. One association’s rosy outlook on the challenges and opportunities embedded in any driver of change could be another association’s worst nightmare. Forecasts help make the point—the future could be very different from what we see today. They are a wake-up call to pay attention to change and make decisions today to improve your chances of success tomorrow.

## Working With the ASAE ForesightWorks Drivers of Change

*With so many potential drivers of change, where should your association focus?*

Even if you are going to build your foresight practice from the ASAE ForesightWorks drivers of change action briefs, some scanning steps will help you define where to begin. While they all may have some relevance, not every driver of change in the ASAE ForesightWorks collection will be a priority for your association. However, there is value in being aware of the full set identified by this research. Summaries of the current drivers of change are on the ASAE website. ASAE also offers the summary page for each driver of change free to ASAE members. Once you have scanned all these potential change drivers, you must identify your organization's priorities.

It is useful to apply two filters in your prioritization: the relevance for your association and the purpose you defined in the initiating step. This assessment will help you pinpoint the drivers of change that are important to your association.

To evaluate *relevance*, consider these criteria:

- 1. Mission or member impact.** These drivers could alter either your association's operating environment in ways that advance or hinder your mission or directly affect the work and business of your members. For example, if professional development or advocacy are core parts of your mission, you might prioritize drivers of change affecting these functions. Or you might flag technology or economy drivers that could be game changers for your members.
- 2. Strategic plan goals.** While you can use an existing strategic plan as your point of reference, be alert for drivers that might prompt new goals to be considered in future updates of your plan.
- 3. Association operations.** Do you need to update or strengthen key functional areas of your association? Because ASAE ForesightWorks research is focused on the future of associations, you will find many relevant drivers to inform future advances and investments in your association's capabilities.

The ASAE ForesightWorks action briefs feature an assessment of who might be more affected by a driver of change, such as particular types of associations and nonprofits or specific industries and professions. Because many drivers have a broad impact, you will need your own fine-tuned assessment of these potential impacts.

To evaluate *purpose*, look again at the purpose you prioritized in the initiating step.

- **Strategic planning and strategy development.** If you selected this purpose, the important relevance filters are mission or member impact and strategic plan goals. You likely will need to take a look at each of the drivers of change and select those that align with your association's vision, mission, and goals. Also a priority: those drivers of change that affect both your members and your association, as strategic planning requires a vision regarding both. Your volunteer leaders, if given the opportunity to prioritize the drivers of change, might value those most relevant to their world. Association executives need to champion drivers of change that could affect association operations.
- **Anticipatory learning.** If this is where you want to focus, the most relevant drivers of change are those that you expect will affect your members. You might also want to choose a smaller set of priorities to elevate in your content strategy and educational programming. If you have learning products for specific audiences that could use a refresh, you might keep these in mind.
- **Risk analysis.** Although you can apply a risk-assessment mindset to evaluating drivers of change for your members, your focus here will likely be on association operations. Once you have identified where you think your association may have vulnerabilities, you might want to consider using one or more of the action sets.
- **Innovation and business development.** If this is the purpose of your foresight efforts, the important relevance filters are your strategic plan goals and association operations. The action sets may be a good option for you because they take a more functional approach to organizing and working with drivers of change.

While relevance and purpose are good rubrics for scanning the drivers of change, you may still find you have flagged more drivers of change than you can effectively explore. You can do further winnowing by determining which drivers of change on your list are priorities for action and which might be important to monitor. A priority for action is exactly that—you can see immediate implications for your association and need to take steps in the immediate future to respond. You might flag a driver for monitoring if you perceive that the impact of the change will be experienced further into the future or you have limited ability to take meaningful action. These go on your watch list until the urgency increases.

As a champion for foresight, you may want to do the first scan and assessment of the drivers of change to select action briefs that could be important to your association. You will find a worksheet at the end of this section to assist in prioritization. After you have completed your initial scan and assessment, you may want to engage others in further prioritizing the drivers of change—whether board, staff, volunteers, or other stakeholders. This process works best if you have a concise list. To get this additional input, you can devise a simple polling survey or invite people to participate in a prioritization exercise during a foresight experience. You will find a model you might use in a prioritization exercise in Appendix B.

Prioritization is always a subjective exercise, and the outcome will depend on people's perspectives. Members may place a higher priority on changes that affect them. Staff leaders may be attracted to changes in their areas of responsibility. The best people to prioritize the drivers of change have an expansive strategic awareness of the association's current situation and sense of readiness to pursue change.

To further help you with prioritization, the action briefs in both The Complete Collection and the individual action sets are organized into topical areas that may be priorities for associations. This can be a particularly effective way to dive deeply into an area where you perceive your association needs to invest effort in making changes, such as updating your technologies or responding to changes in your membership, learning, and advocacy efforts. You also may find that using the action sets to organize your research and analysis will make it easier to assign the work to committees or departments with a responsibility for monitoring new developments and recommending actions in these areas.

Each action set includes an introduction that frames how these drivers are interacting to create future conditions for your association, and poses strategic questions to explore the implications, opportunities, and continuing learning and monitoring of these changes. You will also find recommended resources for further reading.

## The Elements of an Action Brief

### *How do I read and work with the action briefs to support my foresight efforts?*

Each ASAE ForesightWorks action brief consists of four pages. These pages have been designed to work together or to be used independently for different purposes and audiences.

The **summary page**, page 1, provides a summary paragraph, the main forecasts, and key uncertainties. If you feel you cannot ask your leaders to read the entire action brief, you can provide this page for pre-reading preparation for participating in any of the foresight discussions and activities you might pursue.

- **Summary paragraph:** A short, precise description of the driver of change. It can be used in reports, summaries, or other information flows to describe the brief. Use this paragraph to ask yourself and others, *How could this driver of change impact our association or our members in an important way?*
- **Forecasts:** Based on the trends and data points collected, these are primary forecasts of changes in this topic area. They represent what are known as “probable futures”—the changes that are likely to happen given current trends and data. The forecasts can be a powerful input to strategic planning and decisions. Use the forecasts to ask yourself and others, *What is our informed guess of how this change will unfold and why?*

- **Key uncertainties:** As with any forecasts, there exists a set of uncertainties that can alter the likely future. These are the “known unknowns,” and they need to be watched and considered when making downstream forecasts. It’s useful for organizations to monitor these uncertainties to see if they significantly change the direction of the forecast over time. In looking at key uncertainties, ask yourself and others, *What other uncertainties, if resolved, would give us a better sense of what might happen?*

The **supporting trends** and data are conveyed on page 2. This page elucidates some of the key trends that informed the forecasts, points to related action briefs to help readers develop a comprehensive view, and provides a few supporting data points. The supporting trends information briefly provides context and evidence for identifying this topic as a driver of change and supporting the forecasts.

- **Supporting trends:** These are the key trends and weak signals that informed this action brief and are useful for providing background understanding of the rationale for the forecasts and other sections. Ask yourself and others, *What other evidence have we seen or experienced that supports this driver of change?*
- **Notable data points:** A short list of interesting data points is included to help validate the trends and forecasts, as well as to provide useful talking points and illustrative information to support the action brief as a whole. These are often attention-getters and reinforce the importance and significance of addressing the action brief in strategic and operational planning. Ask yourself and others, *Can we identify other data points that make this driver of change relevant for us?*
- **Related drivers of change:** Readers are pointed to additional action briefs that would be useful to read and understand in concert with this brief. Ask yourself and others, *In reading these other action briefs, do we see additional insights and implications for our association?*

The **strategic insights** on page 3 provide information you might use to seed your own explorations of potential implications for your association. It includes some broad insights, timing, and some potential alternative futures.

- **Strategic insights:** These are insights or implications of particular relevance to associations. They identify opportunities and risks associations should be aware of, and provide tangible suggestions to help frame and provoke strategic conversations. When considering these insights, ask yourself and others, *What additional opportunities and risks do we see?*
- **Timing:** Timing identifies the overall maturity and speed of the driver of change. There are two aspects: stage, which assesses where the change driver is in its lifecycle, and speed, which addresses how fast or slow the driver is moving. These indicators help to inform the urgency and priority of this brief. Ask yourself and others, *Are we in an industry or field where this change is occurring slower or faster?*
- **Potential alternative futures:** Based on the uncertainties, this section presents some possible (not probable) futures that should be considered from a risk management perspective. While they edge into the “wildcard” domain, they are not impossible. Foresight explores “What if this happens?” and “Are we prepared to respond?” When thinking about the alternative futures, ask yourself and others, *Which alternative futures are we prepared to address? Which would be very challenging?*

**Take Action**, page 4, identifies action steps for leaders to consider, the types of organizations that will primarily be affected, and keywords to support continued research in this action brief area.

- **Take action:** These actions were identified by a volunteer team of association executives and business partners. If your association is already addressing this driver of change, you may be ready to move beyond these initial ideas to other responses to take advantage of the opportunities and prepare for the risks. For most, these offer good first steps to consider or to help start the dialogue on actions that should be taken. In reviewing these steps, ask yourself and others, *What steps make the most sense for our association?*

- **Keyword search:** These are useful terms associations can employ to pursue additional research or flesh out their understanding of what is currently happening in the area. When searching these terms, it can be constructive to add further refinement such as:
  - Restricting the search to the current and previous year
  - Targeting specific publications, search engines, or domains such as Google Scholar, .gov, or .edu
  - Using two or more terms in combination
  - Targeting a specific geography
- **Who will be affected:** Most organizations will experience the effects of each driver of change to some degree. Organizations and association members that might experience additional specific, notable changes are highlighted in this section. Ask yourself and others, *Are there particular segments of our membership who will be more affected than others by this driver of change?*

*INSTRUCTIONS: You may be able to quickly select your high-priority drivers of change by scanning the summaries. This worksheet is designed to help you track and share your assessment with others.*

It's your decision how much detail you need to capture in this worksheet. Use it in whatever way serves you best.

<b>Driver of Change Title</b>	<b>Relevance</b> (mission or member impact, strategic plan goals, or association operations)	<b>Purpose</b> (strategic planning and strategy development, anticipatory learning, risk analysis, innovation and business development)	<b>Potential Implications</b>	<b>Priority for Action</b> (high, medium, low)	<b>Action</b> (review with relevant stakeholders, assign to staff, assign to volunteers, monitor for now)



## Step 3: Applying Foresight

Now you are ready to take what you have learned about the drivers of change and move these insights and implications into visioning, planning, and acting. These are not necessarily sequential processes. Rather, once you understand how foresight works and align these efforts with your association's processes and workflows, you will come to see these steps as continuous and iterative processes as you deepen and strengthen your commitment to foresight. As in any discipline, from music to sports to science, first you master the basics, then you can improvise and experiment with the knowledge and skills you now possess.

- **Visioning** sets the future direction. After exploring possible futures that could result from the identified changes, you will move into thinking about what your association might need to do to achieve a desirable outcome—your preferred future. Visioning sets the strategic direction.
- **Planning** sets out the actionable steps to make your vision a reality. Your foresight work will help you identify the strategic issues and opportunities that should drive your association's plans.
- **Acting** with foresight is more than executing future-informed plans. It is also deciding how you will instill a discipline of foresight throughout your organization and communicate with members and stakeholders about how you are working to create a preferred future on their behalf.

### Visioning a Preferred Future

*What is the preferred future I seek to create?*

Visioning is much more than the vision statement your association adopts to express its aspirations. In the visioning step, you are defining your envisioned future built upon and in response to the drivers of change you see shaping your future. However, if your vision statement falls into the “we want to be the best” variety of vision statements, this could be a signal of a potential deficiency in your foresight practice. When leaders aspire to be the “best,” “premier,” or “leading” organization, they often are measuring the organization's success against current conditions without sufficiently considering how much change might occur in the next 5-10 years. These kinds of vision statements tend to benchmark against present needs and expectations.

The most compelling visions come from asking challenging questions, such as, “Who do we want to be,” “How can we better serve society,” and, “What will be our highest contribution to the future?” Answering these questions requires a deep awareness of long-term patterns of change within your profession, industry, or cause. A vision takes the long view of what your association might become with enough effort and boldness exercised over time.

Associations need visioning at critical turning points in their industry or profession. These are some crucial indicators that you might need to undertake a serious visioning effort:

- **Evolving member and stakeholder roles.** Your scanning and forecasting reveals significant opportunities to redefine who your future members could be or the roles they might have in a changing industry.
- **Disruptive innovation.** Emerging developments, such as changes in technological capabilities or customer preferences, could expose your association to new competition unless you adopt a new strategic direction to remain relevant.
- **Societal challenges.** You may identify a new urgency for what your members do and want to lay claim to the leadership and contributions your association can make in meeting societal needs.

Visioning requires intensive member engagement and dialogue to discern a shared vision. To set the stage for these member dialogues, you can use the relevant action briefs. Visioning processes present a perfect opportunity to explore how the identity of the members and the association might change over the next 10 years. A quick way to convey these changes is to show how the identity is evolving from today into the future. The forecasts included in the action briefs as well as the potential alternative futures can enrich visioning discussions.

A truly bold vision could take 10 or more years to achieve. Given the amount of change your association may experience over that timeframe, you will need to do a thorough and ongoing job of scanning and forecasting in support of visioning. If certain drivers of change are deemed to be critical to your vision, you will want to dive deeply into exploring the key uncertainties and potential alternative futures briefly described in each action brief.

If you believe your members may need a deeper and more persuasive exploration of future change to embrace a new vision, you may want to consider creating scenarios. Scenarios are a powerful foresight tool for constructing future stories or images of the future. There are several ways to construct scenarios.

- A 2x2 scenario matrix approach identifies two key factors or areas of uncertainty and explores their high or low variation in combination. If factors A and B are both high, these conditions would exist. If both are low, these conditions will exist. Or one factor could be high and the other low in the other two quadrants. This common scenario approach supports a two-dimensional analysis.
- An archetypal approach typically organizes a set of drivers of change as they would appear in an expected or probable future, in a feared or challenging future, or in a transformational or preferred future.

You can find out more about scenario methodologies, including examples, through a quick online search, or you may want to turn to futurists and other consultants who have expertise in building scenarios. To be effective, scenarios do not have to be lengthy. In fact, short, readable scenarios or video vignettes work best in learning and decision-making situations. Scenario workshops are a good way to experience firsthand creating alternative stories of the future and then talking about what you want to avoid and what you aspire to achieve.

## Planning to Achieve Your Vision

*How will foresight make my association's strategic planning more effective?*

One reason a membership association exists is to do collectively what individuals cannot accomplish on their own. Because this collective action cannot happen without planning, all associations plan to some degree. High-performing boards have strategic plans that culminate from more deliberative prioritization and decision-making processes. Much of this planning tends to focus on what people need to accomplish in the near term.

Critics of strategic planning and formal planning processes argue that the degree of uncertainty and rate of change make strategic planning or action planning pointless. However, associations that use foresight to inform planning can set strategy and goals that anticipate and take advantage of the strategic leverage future changes create. They can act in ways to create their preferred future while minimizing or mitigating the challenges that could undermine their success. Planning cannot eliminate uncertainty, but it can minimize the need for crisis response. The best-informed strategic plans rely on an astute assessment of both the current situation and future issues and opportunities.

In the scanning and forecasting section, we described using your strategic plan goals as one framework for filtering and prioritizing potential drivers of change. This is the most practical way to use ASAE ForesightWorks to see immediate benefit in your association. In scanning the drivers of change, you might also flag significant opportunities that could be gaps in your strategic plan.

Four elements of the ASAE ForesightWorks action briefs are especially useful in strategic planning:

- **Forecasts**—informed assessments of how this driver of change will unfold. You may want to spend time refining your own forecasts for potential areas of change in your strategic plan. These shape your planning assumptions.

- **Timing**—assessments of what stage the driver of change is in its lifecycle and the speed at which it is moving. Timing will vary across industries; you might be in a field, for example, that leads in IT advances and data analytics, or works on the frontlines of the increasing demographic diversity within society.
- **Related drivers of change**—analysis of related drivers provide a system view of how interrelated changes may interact and combine to create new possibilities. You can use the forecasts and timing in these action briefs to refine your strategies.
- **Take action**—potential steps you might take to respond to drivers of change. These recommendations could function as a checklist for potential objectives in support of your strategic goals, particularly if you are in an early stage of response. Or they could serve as a springboard for deciding whether you need to take other next steps, or if you judge your response to be sufficient at this time, shift your energy into other priorities.

ASAE ForesightWorks highlights areas where changes are occurring. In strategic planning, it is just as important to observe what isn't changing in your mission or what your members value. Strategic plans reinforce where associations may need to redouble or improve their current efforts to keep their important promises to members. Effective strategic plans are exercises in anticipating the future, preserving what is valuable from your past, and strengthening what is working in your present.

Strategic planning is not an “every three years and done” process. Association boards should be looking at their plans on an annual basis to see if they need to update and recalibrate objectives and strategies within their broader goals. You can use your ongoing scanning and forecasting efforts to risk-test your current objectives and action plans. To support association leaders in their efforts, the ASAE ForesightWorks program will be reviewing, updating, and adding new drivers of change on an annual basis.

If you want to take a more intensive approach to using foresight in strategic planning, you might consider using the three horizons methodology. This methodology, developed by management consultants and refined by futurists for foresight practice, presents future changes in the context of three horizons. The first horizon typically is the near term and describes present conditions, which the organization's current strategy and plans are likely to effectively address. The second horizon looks out three years or more to explore a time of increasing uncertainty and transition. By examining this period of change, you can identify how to revise your strategy to fit better with potential future conditions. The third horizon is long term and represents the period when your association hopes to have achieved its preferred future. Three horizons analysis can give planners a sense of how an organization's strategy must evolve to respond to changing conditions.

## Acting with Foresight

### *How can I use foresight to make better decisions?*

Hard-charging association executives and volunteer leaders are action- and solution-oriented. Acting with foresight asks you to hit the pause button long enough to make sure that any plans and solutions you pursue reflect the anticipated future—rather than assuming tomorrow will be an extension of the conditions you see today. Acting could be the most challenging step, because this is when you move from the safe space of foresight analysis and decision making into executing plans and leading change. This is when your insights about the future and your plans are tested by the everyday realities of managing an association.

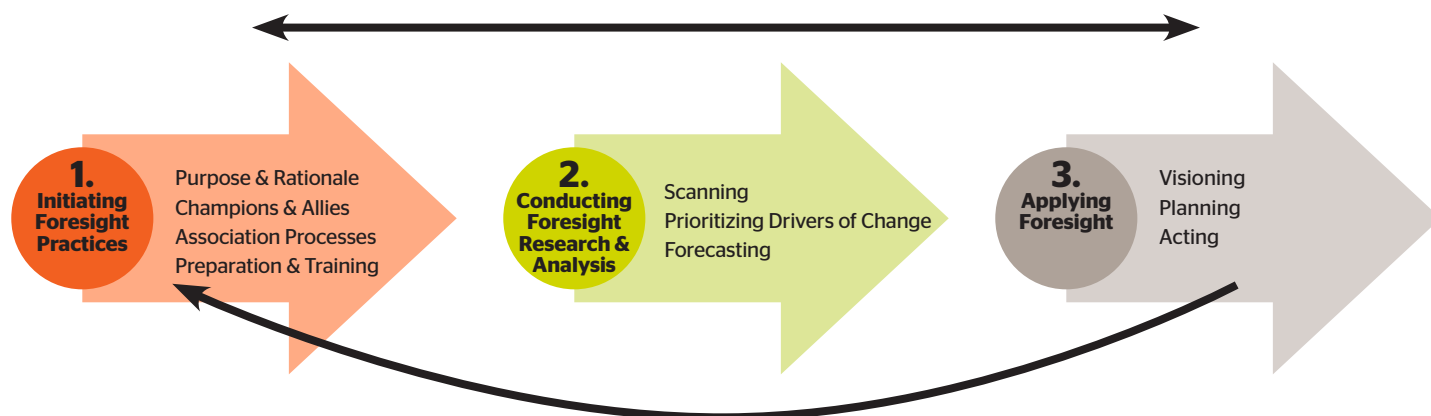
Once you have identified what you believe to be the priorities for leading change within your association, you can use the action briefs to recruit additional champions and allies. Share the relevant action briefs with the individuals and constituent groups who need to understand your proposed plans and actions. Encourage them to help you expand on your association's efforts through their own channels of education, outreach, and action. In the Planning Your Foresight Journey section, we describe an ever-expanding circle of engaging association members and constituents in possible foresight experiences. You will have to determine the scale and level of effort that is appropriate for your association.

Acting with foresight across an association takes discipline to establish a new way of thinking and create continuous processes for studying and assessing the future. Return to the “Initiating Foresight Practices” section and look again at the purposes you selected for your initial foresight efforts. How can your association move into acting with foresight for all four purposes: strategic planning and strategy development, anticipatory learning, risk analysis, and innovation and business development? What processes and practices do you already have in place that could be amended to incorporate foresight? Figure 4 captures some ideas to get you started thinking about how you can build on your initial efforts to institutionalize foresight in each area.

**FIGURE 4. Action Steps for Applying Foresight**

Strategic Planning and Strategy Development	Anticipatory Learning	Risk Analysis	Innovation and Business Development
Assign responsible staff or committees to monitor drivers of change to inform your next planning cycle.	Incorporate priority drivers of change into your content strategy to focus on articles and learning opportunities.	Test your current business model against potentially disruptive drivers of change.	Incorporate foresight into brainstorming and innovation processes to identify new needs and customers to serve.
Use changing conditions to identify and justify programs and services for sunseting.	Urge committees and councils to do additional research into drivers of change in their areas of responsibility.		

**FIGURE 5. The Foresight Process is Continuous**



A critical element of the foresight process is the return to foresight practices on an ongoing basis. An exploration of foresight might yield interesting and helpful information, but the true value is found in developing a continuous process of initiating, researching and analyzing, and applying foresight. When you institute regularity around this process (Figure 5), you start to establish a culture of foresight. Your champions, leadership, and staff will develop defined roles in the process, and you'll be better able to turn future-focused insights into strategic plans and positive outcomes.

## Planning Your Foresight Journey

Now that you understand the foresight process, you are ready to plan your foresight journey at the scale and level of effort that makes the most sense for your association. You might consider undertaking foresight experiences and activities at three levels of effort:

- **Exploratory**—If you are new to foresight and not yet sure how interested your leaders and staff are in addressing future changes, adopt an exploratory approach. These activities will introduce key leaders and staff to thinking about the future without committing you to specific actions. However, even in this exploratory mode, you should practice scanning and forecasting to support your strategic planning.
- **Engaged**—Your foresight efforts extend more broadly across the association and address at least two of the four potential purposes for foresight. You are actively engaging members in foresight through various anticipatory learning activities. You are already doing much of what is proposed for the exploratory pathway.
- **Leading**—Because you are fully committed to creating a preferred future, you are using foresight to lead change on behalf of your members and working with other stakeholders to advance important societal goals. If you are leading, you are using foresight for all four purposes. You are conducting additional foresight research to deepen your awareness of changes affecting your members or their industry.

Leading may sound instantly appealing, but you may want to be wary of jumping directly into major initiatives. Other organizations have launched initiatives with much public fanfare and expense, investing in custom research and extensive engagement processes. In the end, they surfaced some exciting insights about the future only to fail in establishing sustainable practices that would spread this learning throughout the association, inform future plans, or help determine long-term actions.

Why might this be? The terms of future-focused officers and board members end. When crisis occurs or heavy workloads absorb nearly every available minute of the day, people quickly become very present-focused. Foresight is like any discipline. It requires time to learn and practice and even more time to establish habits that will not be undone by events and other priorities.

We want you to be very excited about what foresight can mean to your association and even wiser about how to plan your journey to create a culture of foresight that endures. Go slow at first, and plan to pick up speed as you gain more champions and allies to back up your enthusiasm and learn how to make foresight work best for your association.

### Planning for Associations Experienced in Foresight

*We are not new to foresight, so how can we use ASAE ForesightWorks to strengthen what we are doing?*

There are of course associations that do have mature foresight programs. If this describes your association, this user's guide can help you identify additional practices to expand or strengthen what you are doing.

Moreover, there is certainly more you could do in leading change. Associations have tremendous influence and resources for convening people around understanding the future and creating a shared vision of what a preferred future might require of everyone. Until you have achieved your vision and extinguished your association's reason for existing, there is always more you could do to help your members and society work together for a better future. Use the grid of activities at the end of this section as a checklist to see what else you might try to boost your foresight efforts.

## When to Use Futurists and Other Consultants

### *Where can I turn for additional help in establishing my foresight efforts?*

Associations hire consultants when they need specialized expertise or when they do not have sufficient staff capacity to handle new initiatives. The same is true for foresight. You could build out your own foresight program using the ASAE ForesightWorks materials. If you are not confident of your grasp of the fundamentals in working with foresight, or you need to devote your time to other priorities and strengths you do have, you can hire a futurist or other consultant to take your association through this structured approach. Even if you decide to hire a futurist, reading this user's guide will make you a more informed consumer and help you write a request for proposal that specifies the work scope and activities you want to undertake.

Futurists are the expert practitioners of foresight. They may have advanced degrees in foresight and/or extensive experience in using these methodologies with a range of clients. Like other professionals, they join associations like the Association of Professional Futurists and pursue professional development to hone their knowledge and skills. Some futurists will specialize in particular industries or fields, bringing a wealth of subject matter as well as process expertise.

Foresight is a well-established suite of methodologies that other management consultants also use without calling themselves futurists. They may be adept in environmental scanning and strategy development. Some of the leading management consulting firms regularly research and produce future-focused reports in areas of client interest. If you have the budget or corporate relationships, they could be a source of additional assistance. The ASAE Buyers' Guide lists association consultants who also have expertise in environmental scanning.

Before you search for outside assistance, you should be clear about what you really need to support your efforts. If you feel you will need additional scanning research to bolster your efforts, look for consultants with a track record in environmental scanning and forecasting. Probe their ability to translate often complex changes into user-friendly and accessible formats. If you are primarily interested in speakers for conferences and other learning experiences, prioritize communication skills and showmanship over substance, unless you are choosing someone to engage with knowledgeable members in seminars and workshops. If you need consultants who are adept in working directly with key leaders in scouting the future, planning sessions or high-stakes conversations about the future, prioritize facilitation and change leadership skills.

## Overcoming Resistance to Foresight

### *How do I respond to resistance to practicing foresight?*

People have written volumes about overcoming resistance to change, and most of this advice applies well to foresight, which seeks to understand and lead change. While many of us hear or even have excuses for not practicing foresight, these excuses can be countered:

- We are too comfortable with the status quo. [Consider instead: *We can't protect the status quo from changing conditions even if we tried, so let's focus on the values we need to preserve and strengthen the processes that are working for us to pursue future opportunities.*]
- Are you in denial about how much things will change? [Consider instead: *Create a future story that offers members an image of what the future might be and positions them as leaders acting to adapt and thrive despite a daunting set of changes.*]
- Our leaders just want to do what they know until they retire. [Consider instead: *People may be anxious about their ability to learn and adapt, but there's little evidence to support that older people are more fearful of thinking about and acting to advance the future. In fact, they may be more deeply invested in ensuring a future for others.*]

- My board is not very strategic. [Consider instead: *Many professions and businesses offer few opportunities to regularly practice strategic thinking, but you can create environments and processes in which board members do get to practice the discipline of foresight. Not everyone has a natural aptitude, but they can gain some proficiency using the processes described in this user's guide.*]
- We are too busy to do one more thing. [Consider instead: *To paraphrase management consultant Peter Drucker, doing the right thing is more important than doing the thing right. Foresight helps ensure your association is choosing to do the right thing in a changing environment rather than continuing to do many things that could no longer be as relevant.*]

Many of the foresight experiences described in this section give your leaders and members a chance to rehearse the future before they must live it. We are less fearful of change when we have had an opportunity to think through how we will respond. There is also great comfort in working with peers and colleagues to understand the future. We gain a sense that we are not in this struggle alone and we are reassured we can learn faster with the support of others.

## Choosing Your Path for Each Level of Effort

*How do I design a customized journey into foresight for my association?*

In the chart that follows, you will see suggested foresight experiences and activities. These paths do build upon one another as you progress in your level of engagement. However, if you see something that sounds attractive listed in a level you are not choosing, do feel free to add it to your path. These suggested pathways simply illustrate how you might scale and stage your efforts. Once you understand the rationale for a proposed activity, you can modify it to fit your needs. You are the designer of this journey.

### Exploratory Path—Introducing Foresight to Association Leaders

Experience or Activity	Who	Foresight Purpose	Process Step	Objective
Planning how to use foresight	Foresight champion	Define relevance and purpose	Framing	Focus and make the case for practicing foresight
Prioritizing drivers of change	Foresight champion, chief staff officer	Applicable to all four purposes (see initiating step)	Scanning and forecasting	Assess significance for your association to focus on a few high priority drivers of change
Leadership survey assessing drivers of change priorities	Board members, key volunteer leaders	Strategic planning and strategy	Scanning and forecasting	Confirm priority drivers of change and their implications
Strategic conversations	Board members	Strategic planning and strategy	Scanning and forecasting	Explore drivers of change and their implications
Planning retreats	Board members	Strategic planning and strategy	Planning	Use scanning and forecasting to identify future opportunities and challenges
Conference sessions on foresight topics	Members	Anticipatory learning	Scanning and forecasting	Explore potential changes, possible responses and solutions
Staff lunch and learns	Staff	Anticipatory learning	Scanning and forecasting	Discuss how drivers of change could affect association operations



**Engaged Path**—*Practicing Foresight across the Association*

Experience or Activity	Who	Foresight Purpose	Process Step	Objective
Foresight training	Key staff and volunteer leaders	Applicable to all purposes	Applicable to all steps	Establish an internal foresight capacity
Scouting the future workshops	Diverse array of members & staff	Strategic planning and strategy, anticipatory learning	Scanning and forecasting	Intensive one-two day analysis of priority change drivers, their implications and possible responses
Volunteer leader retreat	Committee, council, task force chairs	Strategic planning and strategy, anticipatory learning	Planning	Engage key member groups in identifying actions they can take in response to change drivers
Chapter leader training	Chapter leaders	Strategic planning and strategy, anticipatory learning		Achieve wider awareness of key changes and potential alignment with plans and action steps
Innovation workshop	Staff, selected subject matter experts	Innovation and business development	Planning, acting	Design new programs and services for the future
Risk analysis audit	Staff, oversight committees	Risk analysis	Planning, acting	Identify business model, programmatic and operational vulnerabilities stemming from drivers of change
Foresight task force/committee	Diverse array of volunteer leaders	Anticipatory learning, strategic planning and strategy	Scanning and forecasting, planning	Research drivers of change affecting members, industry
Incorporation in content strategy	Staff	Strategic planning and strategy	Planning	Feature priority drivers of change in key learning and information dissemination channels



**Leading Path**—*Leading change beyond the Association*

Experience or Activity	Who	Foresight Purpose	Process Step	Objective
Think tank	Top leaders within profession, industry, cause	Anticipatory learning	Scanning and forecasting	Conduct high-level analysis of changes affecting profession, industry, cause
Summit	Thought leaders & key influencers	Strategic planning and strategy	Planning, acting	Inform and unite key decision makers in acting to lead change
Major foresight research study	Contracted futurists, research consultants	Anticipatory learning	Scanning and forecasting	Conduct in-depth, credible foresight research for your industry to be shared with members, public
Innovation/solution initiative	Industry pioneers, strategic partners	Innovation and business development	Planning, acting	Collaboratively create innovative solutions to respond to future opportunities, challenges
Anniversary celebration	Association leaders and association allies & stakeholders	Anticipatory learning, strategic planning and strategy	Scanning and forecasting, planning	Claim responsibility to lead future changes while celebrating past achievements
Foresight institute or unit	Staff, futurists, external consultants	Applicable to all four purposes	Responsible for supporting all six steps	Invest in the expertise and capacity to practice foresight in all internal and external arenas

# Appendices

This user's guide appendix offers tools you may find useful in facilitating your exploration of drivers of change and their implications for your association. We also offer some facilitation guidance on typical association events and experiences where you might organize to create a culture of foresight. These overviews will help you plan and customize your own foresight experiences. You also will find a glossary of common terms used in foresight. You will be able to find additional resources as they are developed at [www.asaecenter.org/foresightworks](http://www.asaecenter.org/foresightworks). We have included a list of additional resources you may find useful as you deepen your practice of foresight.

## Appendix A:

# Driver of Change Analysis Questions

*NOTE: We suggest using this as a discussion guide with a small group of volunteer analysts. Members enjoy exploring these questions together. You also could also use it to solicit written responses.*

**Driver of Change:** \_\_\_\_\_

*INSTRUCTIONS: Please read the action brief; then use these questions to analyze the relevance, responses, and actions our association should consider.*

### Opportunities and Challenges for Our Association

1. How will this change affect our association?
  - a. Strategic plan and strategies?
  - b. Specific members, business partners, and other stakeholders?
  - c. Programs and services?
  - d. Positions and policies?
  - e. Business practices?
  - f. Other?
2. What are the opportunities and challenges associated with this driver of change?

### Opportunities and Challenges for Our Members

3. How will this change affect our members?
  - a. Their job or business opportunities?
  - b. Who their competitors and collaborators could be?
  - c. How they will work?
  - d. How their organizations are structured?
  - e. What they will need to know and learn?
  - f. Laws, regulations, and standards governing them?
  - g. Other?
4. What are the opportunities and challenges associated with this driver of change?

### Action Steps

5. What immediate responses and actions would you recommend our association take?
6. What immediate responses and actions would you recommend members take?

### Relevant Tools and Resources

7. What tools and resources are needed to help us understand and respond to this change?
8. Are there any tools and resources that already exist within our association or from other sources?

### Additional Questions

9. As we continue to monitor this change driver, what additional questions should we try to answer?

Appendix B:  
Drivers of Change  
Potential Impact  
Survey

NOTE: This survey format can be used in a digital surveying tool or live in a meeting setting as a handout to be hand-scored. Any survey will work better if you do an initial review of the ASAE ForesightWorks drivers of change and limit your survey list to those potentially relevant to your association and its members. Adding the open-ended comment box will help you discover other trends and issues of concern to your members.

INSTRUCTIONS: Please rate the potential future impact of these drivers of change in two ways:

- The degree to which this driver could affect individuals and organizations within our industry/profession/field/cause\*
- The degree to which this driver could affect our association, its priorities, and operations.

Rate on a scale from 1 to 5 with 1 as the lowest potential impact and the highest potential impact as a 5.\*\*

Title	One-Sentence Description***	Potential Future Impact to Our Industry/ Profession/Field/ Cause*	Potential Future Impact to Our Association
Driver of Change A			
Driver of Change B			
Driver of Change C			
(Continue on)			

What other drivers of change could affect our industry/profession/field/cause?\*\*

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What other drivers of change could affect our association?

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\* Use the most appropriate word for your association.

\*\* If you are conducting this survey in a live setting, you may want to use a simpler rating of Low, Medium, and High.

\*\*\*Consult the summary paragraph of the action briefs to develop a one-sentence description. Or use the entire summary paragraph if you have space and time and feel you should provide a longer description.



## Appendix D:

### Questions to Understand Timing

Timing is an important consideration in understanding any futures forecast. Yet, this is one of the most difficult things to explore. Generally, drivers of change do not unfold as fast as one might expect or hope. There are items that influence the speed of a change. We break these into two categories: accelerators—things that speed up the change—or decelerators—things that slow down the progression of the change. While accelerators and decelerators are unique to a specific forecast, here are some general things to consider when estimating a potential rate of change.

#### Accelerators:

- Is there an individual (champion) or organization backing the change and putting money and energy behind it?
- Is there a strong need to have the change happen, and is that need greater than the risks that may be associated with the change?
- Is social media amplifying the effect?
- Is there an event that will bring visibility and energy to this change?
- Are there other trends that are pushing this change along?
- Do economic conditions favor the change?
- Will younger generations push the change?
- Are there any technological breakthroughs that will enable the change?

#### Decelerators

- Are there pending regulations or laws that are in work to dampen the change?
- Are there potential or actual events that make visible the risk associated with the change?
- Is a champion working against the change?
- Do economic conditions or incentives work against the change?
- Are there technology obstacles that need to be overcome?
- Does the change work against societal values and attitudes?
- Are consumers really interested in the change?

There are some timing facets, however, that are more knowable about a driver of change and provide useful information for timely responses. Stage and speed of change are assessable. Stage evaluates where the driver of change is in a change lifecycle, and speed considers how fast or slow the change is moving. These indicators help prioritize the urgency of the different changes and are included in each driver of change. More information on these can be found in the section “How to Read and Use an Action Brief.”

## Appendix E:

# Strategic Conversations

### Purpose

Explore future changes and their strategic implications for your organization.

### Objectives

- Challenge current assumptions and plans.
- Increase understanding among key leaders.
- Anticipate possible implications and actions.

### Potential Participants

- Association boards are advised to reserve time for strategic conversations in board meetings.
- Key staff leaders actively participate in these discussions.
- Any governance leadership group (committees, task forces, councils) could switch into this mode of thinking and dialogue to support decisions.

### ASAE ForesightWorks Resources

- An action brief on a driver of change or an action set—a collection of drivers of change on a theme
- “Driver of Change Analysis Questions”

### Time Required

45-90 minutes per driver of change; 180 minutes to discuss the implications of the drivers of change in an action set.

### Logistics

Round tables set for groups of four to six people with sufficient sound space to support people hearing one another.

### Typical Agenda

1. Framing the driver of change
  - a. Recap the summary description and forecasts.
  - b. Propose possible implications.
  - c. Pose strategic questions to be discussed.
2. Table discussion group sense making
  - a. Discuss potential implications for the association; for the members.
  - b. Identify plans and decisions that could be affected by this change.
  - c. Recap key insights to share with the full group.
3. Full group sharing
  - a. Share key insights.
  - b. Agree on the nature of next steps and the sense of priority for further action.

**Tips**

- Separate strategic thinking and conversation from deliberation and decision-making processes to free people to be more inquisitive, wide ranging, and provocative.
- Encourage people to come prepared to these discussions by reading the supporting drivers of change briefs before the conversation.
- Ask for volunteer recorders or assign staff recorders to capture table discussions.
- If no specific next steps are identified, do continue to monitor the driver of change and bring it back to the board or committee when it is ripe for action.



## Appendix F:

# Strategic Planning Retreat

### Purpose

Develop or update a strategic plan.

### Objectives

- Examine the future context and emerging priorities.
- Set plans and strategies to create a preferred future.

### Potential Participants

- Board of directors—which has fiduciary responsibility for setting the organization's strategic direction
- Strategic planning committee-- if the board delegates initial strategic plan development
- Executive staff team—knowledgeable advisors who offer a strategic perspective on the organization's options
- Key stakeholder representatives—to reflect the diversity of the association and act as knowledgeable resources

### ASAE ForesightWorks Resources

- “Drivers of Change Prioritization Worksheet” and the action briefs for the prioritized drivers
- “Drivers of Change Potential Impact Survey”
- “Step 3: Applying Foresight”

### Time Required

One and a half to two days for a strategic planning retreat with up to three hours devoted to exploring prioritized drivers of change and their implications for strategic planning.

### Logistics

Space for a working meeting, including round tables to support group discussions and to break the group into working teams to develop goals and objectives. Provide flip charts, AV for sharing information and collaborating on key decisions.

### Typical Agenda

Associations use different strategic planning methodologies which each have their own process flows. To incorporate foresight into these discussions, kick off your planning retreat with a briefing and exploration of your prioritized drivers of change. This will ensure that people are thinking forward to changes ahead rather than assuming current conditions and priorities will continue.

Similar to strategic conversations, your exploration should encourage people to identify and discuss potential implications of these drivers of change.

**Tips**

- Present programs and priorities have the advantage in strategic planning because people are familiar with them and often value them. You will have to take special steps to take advantage of future changes and emerging opportunities.
- Do not be discouraged if your new plan reflects considerable continuity of priorities and programs. Boards will commit to the degree of change they can accept; taking time to explore the future does foster greater openness to change and willingness to try new initiatives.
- When you announce your new plan, explain how you are acting upon drivers of change expected to shape your association's future.

## Appendix G: Stakeholder Summit

### Purpose

Define the shared vision and strategic direction for leading change in an area of opportunity.

### Objectives

- Create shared understanding and consensus around a preferred future in an area of anticipated change.
- Mobilize multiple organizations to help an industry or field better understand drivers of change and unite to achieve a desired outcome.

### Potential Participants

- Leading associations and organizations engaged in a field
- Thought leaders capable of challenging assumptions and offering profound insights
- Key policy and decision makers

### ASAE ForesightWorks Resources

- Action sets, especially those organized around society and politics, workforce and workplace, and economic conditions
- Any driver of change action brief
- “Step 3: Applying Foresight”
- “Questions to Understand Timing”

### Time Required

One to two days

### Logistics

Invitations will be coveted if important issues will be discussed and recommendations made. Who to invite will be challenging as the event should be kept to a manageable size for meaningful interaction and collaboration. More than 100 people and the logistics to do productive work become very complicated, although not impossible. Key association leaders and high profile thought leaders and decision makers will need opportunities to speak to future changes. The meeting space will need to accommodate both full group gatherings and small group discussions.

### Typical Agenda

1. Welcome and orientation
  - a. Acknowledgement of who is in attendance
  - b. Purposeful icebreaker to get acquainted
  - c. Overview of summit agenda and expected outcomes
2. Framing the strategic opportunity
  - a. Drivers of change that set the stage for significant change
  - b. Stakeholder priorities and aspirations
  - c. Timing and potential levers and channels for achieving change

3. Understanding the opportunity and its implications
  - a. Topical small group discussions to make sense of change
  - b. Full group processes to synthesize and debrief small group assessments
4. Creating a shared vision and sense of direction
  - a. Small group discussions to dialogue about a preferred future
  - b. Presentations of these visions to the full group
  - c. Leaders react and speak to what excites them
5. Commitments to next steps
  - a. Caucuses by individual organizations or those agreeing to work together on an issue or activity to define next steps and action timeline
  - b. Summit concludes reviewing these next steps commitments
  - c. Closing celebration and acknowledge of what will be accomplished together

**Tips**

- Providing participants with a summit backgrounder and research will create a shared understanding of what is at stake in the future.
- The dialogue can begin virtually before the face-to-face summit to build excitement and continue after the summit to maintain momentum on next steps.
- Summits to lead significant change are major initiatives and should be treated as such, with appropriate planning, resources, and commitment to act on the summit's findings.

## Appendix H:

# Think Tank

### Purpose

Analyze an area of change and its implications to identify potential opportunities and challenges.

### Objectives

- Explore an area of change with thought leaders and subject matter experts.
- Inform strategic decisions for a field, profession, or industry.
- Identify additional research questions and opportunities for innovation and business development.

### Potential Participants

- Senior executives and industry leaders
- Thought leaders and subject matter experts
- Recorders and reporters to document key insights

### ASAE ForesightWorks Resources

- Action briefs or action sets related to the area of study
- "Drivers of Change Potential Impact Survey"
- "Driver of Change Analysis Questions"

### Time Required

One to one and a half days

### Logistics

Frame and define the purpose of the think tank to set the discussion agenda. Facilitate some knowledge exchange in advance of the event, such as action briefs and relevant reports. Provide opportunity for large and small group discussion. Plan how to capture and share key findings, i.e., news stories, videos, and summary reports.

### Typical Agenda

1. Welcome and orientation
  - a. Acknowledgement of who is in attendance
  - b. Purposeful icebreaker to get acquainted
  - c. Overview of think tank agenda and expected outcomes
2. Exploring the changes ahead
  - a. Drivers of change that set the stage for significant change
  - b. Provocative forecasts and/or scenarios to examine alternative futures
3. Probing the changes and their implications
  - a. Topical small group discussions to make sense of change
  - b. Full group processes to synthesize and debrief small group assessments

4. Defining the strategic questions and research needs
  - a. Small group discussions to dialogue about critical uncertainties
  - b. State strategic and research questions for further study
5. Consensus on key findings and strategic questions for further research and study
  - a. Agreement on what was learned and should be shared
  - b. Next steps for further study and follow-up

**Tips**

- The more knowledgeable and provocative your thinkers are, the more useful your key findings and strategic questions will be. Invite participants that can deliver this outcome.
- The people present always learn the most unless you provide ways to capture the essence of the dialogue and share key findings.
- C-suite executives can be attracted to these events more readily than an association's typical professional development and educational programming.

## Appendix I: Leadership Workshop

### Purpose

Inform, align, and mobilize key leaders across an association's affiliate organizations and volunteer groups.

### Objectives

- Identify strategic priorities for the future.
- Align organizational activity with the association's strategic plan.
- Excite volunteer leaders to take action within their respective spheres of influence.

### Potential Participants

- Affiliate/chapter officers
- Committee, council and task force chairs
- Association officers and board members
- Senior association staff and staff liaisons

### ASAE ForesightWorks Resources

- *The ASAE ForesightWorks Complete Collection: User's Guide and Action Briefs* (only do this if your member constituent groups will make this effort a priority; must be used in accordance with the licensing agreement or additional provisions for expanded use arranged through ASAE)
- "Drivers of Change Prioritization Worksheet" and the action briefs for the prioritized drivers
- "Drivers of Change Potential Impact Survey"

### Time Required

Two to three hours minimum up to one day as part of a multiday leadership conference

### Logistics

Encourage work teams to sit together as much as possible to explore implications for a given chapter, committee, or volunteer group's work. Provide relevant association supporting materials, such as strategic plans and organizational priorities. Tie this foresight work directly into existing processes for deliberation and decision making for these constituent groups.

### Typical Agenda

1. Description of potential changes ahead
  - a. Briefing on drivers of change related to the association's strategic priorities
  - b. Prioritization process of drivers of change—incorporating the survey into the session or sharing results of the survey if done in advance.
2. Discussion of potential implications for the volunteer group's work
  - a. How this helps or hinders their work (opportunities or challenges)
  - b. Exploration of actions the volunteer group could take consistent with its current plans
  - c. Identification of areas that should be re-examined in light of anticipated drivers of change

3. Showcase of volunteer work aligned with these changes
  - a. Share examples of related work already underway.
  - b. Invite groups to announce what they will attempt to do in response to anticipated changes.

**Tips**

- Alignment is the important outcome in these foresight sessions. Where within an association's extensive organizational structure can volunteer leaders take action to respond to changes?
- To minimize potential confusion, whatever the association asks of volunteer groups must be clear and consistent with their existing charters and work processes. This will minimize the "now what are they asking me to do" reaction that volunteer leaders may have.
- Volunteer groups tend to focus on an annual program of work, and these drivers of change may require responses that span several years. Acknowledge this and minimize the tension they may experience in responding to longer-term opportunities.



## Appendix J:

# Staff Lunch and Learn

### Purpose

Explore the implications of a specific driver of change.

### Objectives

- Introduce the driver of change, its forecasts, and potential implications.
- Discuss specific implications and opportunities for the association and staff's areas of responsibility.

### Potential Participants

- Interested staff members
- Senior staff executive to signal support for creating a culture of foresight

### ASAE ForesightWorks Resources

- Driver of change action brief, especially the Take Action section
- Driver of change analysis questions

### Time Required

45 minutes

### Logistics

One staff leader should act as the subject matter expert and briefer to frame the driver of change. Brown bag or lunch provided as is your association's custom. Flip chart or computer and LCD projector to facilitate listing possible implications and next step actions. If the group is large, tables for small group discussions.

### Typical Agenda

1. 10-15 minute briefing on the driver of change tracking with the elements in the action brief
2. 20 minute open discussion on implications using appropriate questions from the change driver analysis questions tool
3. 10 minute summary of key insights and possible actions

### Tips

- Assume this session is more introductory than conclusive and anticipate possible next steps for further study and discussion if you have interest.
- Relate the driver of change to specific programs and services. Make the changes relevant to people's daily work.

## Glossary

**Accelerator** An event, champion, or situation that will speed up an expected rate of a forecast or trend.

**Alternative futures** Forecasts that while currently unexpected to happen, could happen, and are within the range of possible futures.

**Anticipatory learning** Learning about future drivers of change and supporting trends so that effective decisions and behaviors can be adapted and adjusted to what is expected to happen in the future.

**Baseline future** The set of forecasts or future that is generally held by most people and aligns with current trends. Also known as expected future or normative future.

**Driver of change** A confluence of trends or a forecast likely to result in significant change in a system.

**Content strategy** The practice of planning, developing, and coordinating delivery of mission critical content to meet member and customer information and learning needs and to achieve organizational priorities and financial objectives.

**Decelerator** An event, champion, or situation that will slow down an expected rate of a forecast or trend.

**Domain map** A visual representation of the domain of interest that bounds and scopes the topic of interest and should be neither too broad nor too narrow.

**Environmental scanning** In foresight, a systematic process for identifying potential signals of change in a system.

**Factor** In a system, a node representing part of the system; for instance, a stakeholder, industry, or activity. In analyzing change, a key factor is one in which change is most likely or most impactful.

**Forecast** A statement about the future, often with a qualitative or quantitative indication of degree and sometimes perceived likelihood of future change. Alternative forecasts may be presented as scenarios.

**Foresight** A structured process for discerning, analyzing, and acting on potential futures.

**Horizon** Concept used for looking across different or multiple timeframes to understand future implications. Generally, three horizons are considered. The first horizon represents current opportunities, the second encompasses emerging opportunities, and the third is realization of a preferred future.

**Milestone** A changed state or indicator for a given signal that shows the signal's speed or impact may be shifting.

**Scanning framework** Multi-faceted lens through which to systematically search for trends, issues, and new developments. STEEP (see definition below) is a commonly used framework. Custom frameworks focus on areas of particular importance to an organization or field.

**Scenarios** Stories or images of the future that describe alternative futures. They can take different forms and levels of complexity depending on the methodology and their intended use.

**Signal** An indicator of trends or future changes, including:

**Strong signals** Indicators of current change (trends) or more-likely future outcomes, often backed by quantitative data.

**Weak signals** Indicators of possible trends or potential future changes, often in early stages and with anecdotal or observational data.

**STEEP+** Acronym for a widely applied taxonomy for sorting or tagging signals or other material according to commonly scanned categories: social, technological, economic, environmental, and political. While STEEP is a good starting taxonomy, it is often changed and/or augmented to better match the domain.

**Taxonomy** A logical set of categories for organizing content such as signals.

**Trend** Change occurring in the present, often indicative of future changes.

**Trend velocity** The speed at which a trend's change is occurring, calibrated to the nature of the system in question.

**Uncertainties** Known unknowns that, as they are resolved, may change the direction of a forecast or trend. Identifying how the uncertainties can play out typically yields the alternative forecasts.

## Further Reading

### ASAE ForesightWorks

The ASAE Foundation will continue to provide additional resources via the website [www.asaecenter.org/foresightworks](http://www.asaecenter.org/foresightworks). The ASAE Foundation is conducting continuous environmental scanning to update this research. ASAE also is working to infuse foresight across its learning programs.

On this site you will find:

- Current summaries of drivers of change
- Descriptions of ASAE ForesightWorks products and resources
- Opportunities to learn more about foresight or the drivers of change

### Useful Reference Books

Bishop, Peter and Hines, Andy. *Teaching about the Future*. [https://www.amazon.com/Teaching-about-Future-Peter-Bishop/dp/O230363490/ref=sr\\_1\\_1?ie=UTF8&qid=1516035101&sr=8-1&keywords=teaching+about+the+future](https://www.amazon.com/Teaching-about-Future-Peter-Bishop/dp/O230363490/ref=sr_1_1?ie=UTF8&qid=1516035101&sr=8-1&keywords=teaching+about+the+future)

Bell, Wendell. *Foundations of Future Studies*. [https://www.amazon.com/Foundations-Futures-Studies-Purposes-Knowledge/dp/O765805391/ref=sr\\_1\\_1?s=books&ie=UTF8&qid=1516035175&sr=1-1&keywords=foundations+of+futures+studies](https://www.amazon.com/Foundations-Futures-Studies-Purposes-Knowledge/dp/O765805391/ref=sr_1_1?s=books&ie=UTF8&qid=1516035175&sr=1-1&keywords=foundations+of+futures+studies)

Glenn, Jerome and Gordon, Theodore (editors). *Futures Research Methodology Version 3.0*. <http://107.22.164.43/millennium/FRM-V3.html>

Schwartz, Peter. *The Art of the Long View: Planning for the Future in an Uncertain World*. [https://www.amazon.com/Art-Long-View-Planning-Uncertain-ebook/dp/B006YYUPN8/ref=sr\\_1\\_1?s=books&ie=UTF8&qid=1516035216&sr=1-1&keywords=Art+of+the+long+view](https://www.amazon.com/Art-Long-View-Planning-Uncertain-ebook/dp/B006YYUPN8/ref=sr_1_1?s=books&ie=UTF8&qid=1516035216&sr=1-1&keywords=Art+of+the+long+view)

### Useful Websites:

Association of Professional Futurists (APF): <https://apf.org> (most links are open to the public)

APF's publications: <https://apf.org/publications/>

Shaping Tomorrow: <https://www.shapingtomorrow.com>

## About the Author

**Marsha L. Rhea, CAE**, worked as senior futurist for seven years with the Institute for Alternative Future before becoming an independent association consultant. In her association career, she held senior positions in two state and three national associations. Marsha created Signature i, LLC in 2008 after recognizing most organizations need help identifying and executing transformative visions. This business blends the strategic perspective and creative skills she gained as a futurist with her more than 20 years' experience in association management. In 2016, Marsha partnered with Foresight Alliance, a rigorous, creative, futures-focused consulting firm, to help the ASAE Foundation develop ASAE ForesightWorks.



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# Content, Learning, and Knowledge Action Set

Perhaps no association functions are experiencing greater disruption than content management and education. From new forms of content sharing that eschew the old revenue-generating journal model, to changes in long-held views of educational methods, disruption is the watchword for learning and content. To add to the confusion, there is a thriving anti-expert ethos that threatens a chief pillar of many associations' mission—providing expert information and guidance about the field they represent to others. In the face of this disruption, there are opportunities for associations to take the lead and guide the development of new ideas in microlearning, mentoring, and innovation in meetings, and events.



The changes to learning and content generation and delivery will present challenges and opportunities for associations, as this is a core area of practice and expertise. To assist with this vital task, the ASAE Foundation collaborated with a research team from Signature i and Foresight Alliance to create the ASAE ForesightWorks Content, Learning, and Knowledge Action Set. The action set includes seven action briefs that introduce the drivers of change that will shape the future direction of learning and content and its associated technologies. Each action brief explores forecasts, implications, and potential responses for organizations as they move forward.

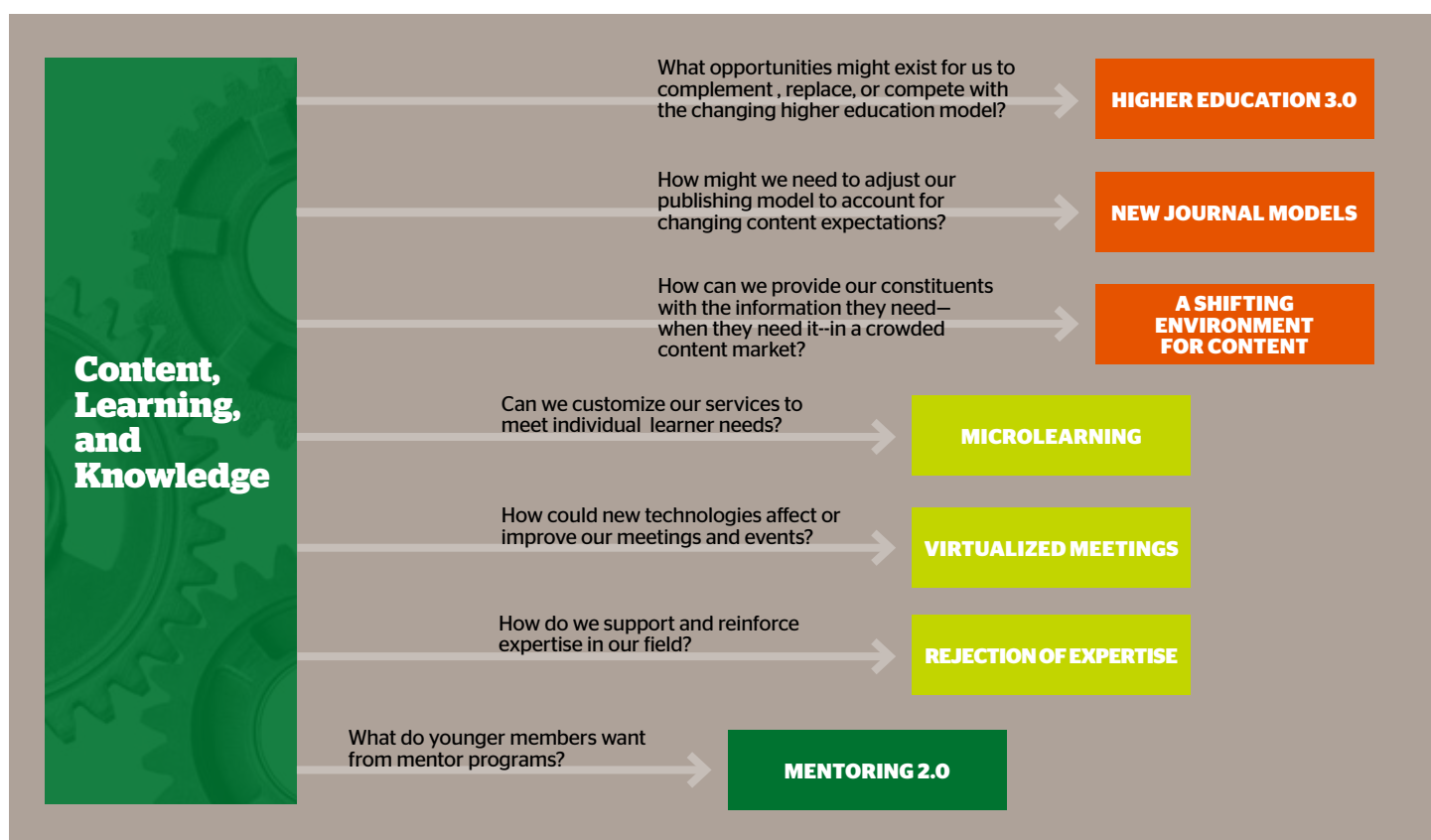
## Putting the Drivers of Change Into Context

The accompanying graphic connects each of the drivers of change to key questions related to the future of your organization or industry. The action briefs are designed to stimulate your thinking about implications, actions, and possible outcomes, as well as to inform and inspire new directions for your strategic planning, risk management, innovation, and environmental scanning efforts.

### KEY:

- Moving fast
- Medium speed or emergent
- More time to plan and prepare

Source: ASAE ForesightWorks







## The Elements of an Action Brief

Each action brief consists of four pages. These pages have been designed to work together or to be used independently for different purposes and audiences.

Page one can serve as a standalone page that summarizes the driver of change and its importance, or as an introduction to the other pages. This page provides a summary paragraph, forecasts—“probable futures” given the current trends and data—and key uncertainties—the “known unknowns” that need to be watched and considered when making downstream forecasts.

Page two is the supporting data page. This page elucidates some of the key trends that informed the forecasts, points to related ASAE ForesightWorks action briefs to help readers develop a comprehensive view, and provides a couple of supporting data points. The page provides evidential support for the forecasts described on page one.

Page three is the strategic insights page. Here you'll find material to help you discuss the driver of change in a strategy session. The page includes broad insights, the projected timing and speed of the change, and some potential alternative futures—possible (though not probable) futures that should be considered from a risk management perspective.

Page four suggests potential actions. This page offers specific steps for addressing the change, identifies the types of organizations expected to be affected, and keywords to support continued research in this action brief area.

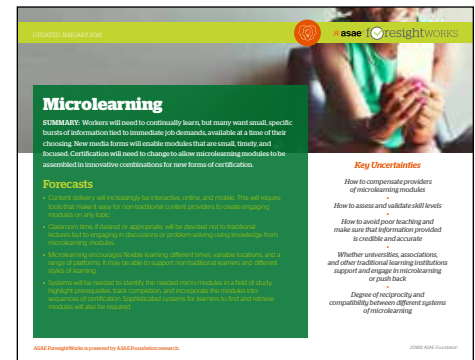
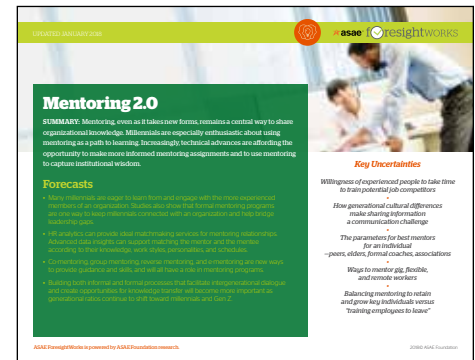
More in-depth guidance for thinking through and working with the action briefs, either on your own or with a group, can be found in the ASAE ForesightWorks User's Guide.

## Strategic Discussion Questions

Initial strategic questions are suggested here as a means of prompting discussion around the action brief set. You may want to choose a subset of the questions or create new questions to have a more targeted conversation with your group.

### Future implications

- How would your organizational business model need to adjust in five or 10 years if content continues its move toward digital and free along lines suggested by the action briefs?
- How do you think members would respond to a move toward the virtualization of meeting and events?





## Opportunities and challenges

- What new content delivery services or formats could these changes enable us to provide?
- How might we best leverage the new educational practices being introduced? What else could we easily be doing?
- How can we take advantage of microlearning and new accreditation opportunities?
- In the face of attacks on expertise, how are we preparing and supporting members who write and speak publicly about their work?

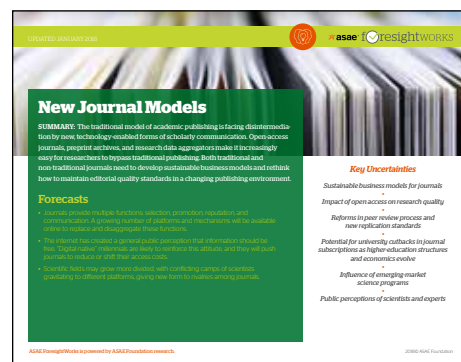
## Building awareness

- How are we staying current on rapidly evolving ideas and technologies driving content creation, curation, and delivery?
- What are ways that we can share our own experiences and best practices around new forms of learning and accreditation?

## Additional Reading

These articles provide more insight into the drivers of change. They can be shared ahead of a discussion to familiarize the group with the concepts and possibilities captured by the action briefs.

- The Chronicle of Higher Education on how the Unpaywall browser extension gets around academic journal paywalls. <https://www.chronicle.com/article/How-a-Browser-Extension-Could/239714>
- Vice Magazine interview on ways higher education should be reformed for twenty-first century students. <https://www.unlimited.world/vice/the-education-pioneer-who-believes-our-schools-must-stop-training-kids-for-a-world-that-no-longer-exists>
- Foreign Policy article on how AI and robotics are changing future learning priorities. <https://foreignpolicy.com/2018/07/11/learning-to-work-with-robots-automation-ai-labor/>
- TechCrunch on how Amazon Web Services is making it easier to build AR and VR programs and apps. <https://techcrunch.com/2017/11/27/aws-announces-amazon-sumnerian-for-building-ar-vr-and-3d-apps-quickly/>
- Harvard Business Review on how effective mentors bring out the best in their mentees. <https://hbr.org/2018/01/the-best-mentors-think-like-michelangelo>





The authors have worked diligently to ensure that all information in this work is accurate as of the time of publication and consistent with standards of good practice in the general management community. As research and practice advance, however, standards may change. For this reason it is recommended that readers evaluate the applicability of any recommendations in light of particular situations and changing standards.

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# Higher Education 3.0

**SUMMARY:** Traditional educational models are under tremendous pressure as changes in work, technology, and student expectations demand both new curricula and new modes of instruction. Higher education is facing new threats of disintermediation by online education and alternative credentialing systems. While the knowledge economy places a premium on analysis and thinking, it is also creating new alternatives to the university that threaten to transform how students receive postsecondary instruction.

## Forecasts

- While top-tier educational programs are relatively unthreatened, online education and alternatives like massive open online courses (MOOCs) could pose a significant challenge to lower- and mid-tier colleges. Private sector acceptance of alternative credentials could amplify the challenge.
- Bifurcation among fields of study—between those degrees requiring access to campus facilities and those that are earnable from anywhere—may grow.
- The meaning of college is in flux, with traditional college models increasingly out of step with a lifelong learning orientation. Additionally, debate about the value of college as a social institution versus college as an arena for professional training will grow.

## Key Uncertainties

*Levels of public funding for research*

•

*The role of MOOCs and microlearning in higher education*

•

*The affordability of higher education*

•

*Who holds the power to credential*

•

*Role and influence of tech philanthropists*

•

*Financial return on college educations*



## Supporting Trends

- **Colleges and universities under pressure.** Enrollment at U.S. colleges has been flat or falling; by one measure, enrollment peaked in 2010 and has fallen every year since, dropping fastest at for-profit colleges and community colleges.
- **The new apprenticeships.** U.S. government support for apprenticeships is significantly expanding, with a planned doubling of federal funding for apprenticeship programs and a goal of 4.5 million apprenticeships by 2022—almost 10 times the total in 2016. The new apprenticeships are meant to benefit U.S. employers as well as workers at all skill levels via paid, certified career-training opportunities at registered organizations.
- **Growth of MOOCs.** Massive open online course offerings and participation continue to grow as the MOOC model is refined.
- **Microlearning.** Microlearning is becoming increasingly popular for corporate training, in part because the format can be readily adapted to meet the growing demand for training content on mobile devices.
- **Community college opportunities.** Student debt concerns, skepticism about for-profit colleges, and the need for flexible programs are making community colleges increasingly attractive to prospective students.
- **Student debt growing.** Student loan debt is growing, with important consequences for both students and institutions.
- **Proliferation of credentials.** The number and types of credentials beyond traditional academic degrees are rising.

### Related Drivers of Change

- Microlearning
- Mentoring 2.0

## Notable Data Points

### OLDER LEARNER INCREASE

From 2014 to 2025 the number of higher education **students older than 25 is expected to increase by 18%.**

*Source: National Center for Education Statistics*

### MOOC GROWTH

MOOCs have grown from 160,000 participants at one university in 2011 to **35 million participants at 570 universities in 2016.**

*Source: Online Course Report, State of the MOOC 2016*





## Strategic Insights

- Alternative credentialing, microlearning, and other direct-to-learner digital education give associations a growing opportunity to play a role as trainers and educators.
- Associations may increasingly need to look beyond university programs as an entry point for recruiting new members. Membership qualifications may need updating to reflect the evolving educational landscape.
- Associations could play a driving role in reshaping higher education. Pressure to reform curriculums to better reflect the needs of the field could potentially catalyze reforms and overcome structural resistance to change.
- Associations may need to look beyond traditional educational institutions to promote effective education and training. This will require identifying relevant alternative institutions and finding ways to build relationships with them.
- Many students do not follow a traditional pathway through four-year education into careers. New academic pathways need to be created to serve the needs of these learners. Associations could meet these needs if academia is unwilling to change. Associations could expand their continuing education programs, adapting them to provide direct-to-learner instruction for a certification or alternative credential.

### Timing

- **Stage:** Emerging
- **Speed:** Medium, slowed by large-scale social institutions and habits

### Potential Alternative Futures

- **Education as infrastructure:** Public funding of higher education is renewed as a way to foster the breakthroughs and innovations that fuel new industries.
- **Student debt forgiveness:** Given that U.S. students have accumulated \$1.3 trillion in student loan debt, with much owned by the federal government, student debt forgiveness is adopted as a future form of economic stimulus.
- **Closing the education tax loophole:** Schools with billion-dollar endowments find it increasingly challenging to defend their status as tax-free nonprofits.



## Take Action

- **Move fast when universities move slow to update curricula.** Associations can have greater flexibility to address emerging issues and competencies, try new learning formats that offer greater accessibility and applied learning, and partner with different types of organizations as education providers.
- **Become the credentialing source employers trust.** Define the essential competencies and assess whether new institutions, online courses, and innovative approaches adequately prepare students. This may require updating unnecessarily rigid requirements about years of education completed and how learning experiences are sequenced.
- **Help prospective students navigate their education options.** If you accredit educational institutions, help students discern where they can trust they will find quality education. Some associations may want to disclose non-accreditation or actively combat low-quality programs. Associations can illustrate potential career pathways and provide advice on how and where to acquire necessary competencies.
- **Partner with new education providers.** Collaborate with universities, individual academics, and corporations offering virtual education that can meet member needs. Many technology companies are eager to help people gain proficiency in emergent skill areas.
- **Defend investments in academic research.** More associations will prioritize advocating for government, corporate, and foundation research funding. Association foundations may step up to organize and underwrite basic research for their field.
- **Learn from the innovators.** Successful MOOCs are pioneering online education that provides impressive reach, innovative experiences in collaborative learning, and extensive curation of digital knowledge resources. Some associations and think tanks choose to call their education programs “universities” to establish a brand for substantive content and learning experiences.

## Keyword Search

To continue researching this change driver, use these search terms:

*virtual education, online instruction, cyber schooling, online college, MOOC, school, digital education, edX, Coursera, Udemy, certification, credentials*

### Who Will Be Affected

Most vulnerable are professional associations and scientific and technical societies with many academic and student members. Academics may be less able to engage as leaders and content experts. Fewer higher education institutions may subscribe to journals and knowledge resources. Online university and other entrepreneurial offerings may compete with professional development programs. Credentialing organizations will have to decide which programs to certify as qualified education sources among this growing array of options.

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# Mentoring 2.0

**SUMMARY:** Mentoring, even as it takes new forms, remains a central way to share organizational knowledge. Millennials are especially enthusiastic about using mentoring as a path to learning. Increasingly, technical advances are affording the opportunity to make more informed mentoring assignments and to use mentoring to capture institutional wisdom.

## Forecasts

- Many millennials are eager to learn from and engage with the more experienced members of an organization. Studies also show that formal mentoring programs are one way to keep millennials connected with an organization and help bridge leadership gaps.
- HR analytics can provide ideal matchmaking services for mentoring relationships. Advanced data insights can support matching the mentor and the mentee according to their knowledge, work styles, personalities, and schedules.
- Co-mentoring, group mentoring, reverse mentoring, and e-mentoring are new ways to provide guidance and skills, and will all have a role in mentoring programs.
- Building both informal and formal processes that facilitate intergenerational dialogue and create opportunities for knowledge transfer will become more important as generational ratios continue to shift toward millennials and Gen Z.



## Key Uncertainties

*Willingness of experienced people to take time to train potential job competitors*

•

*How generational cultural differences make sharing information a communication challenge*

•

*The parameters for best mentors for an individual –peers, elders, formal coaches, associations*

•

*Ways to mentor gig, flexible, and remote workers*

•

*Balancing mentoring to retain and grow key individuals versus “training employees to leave”*





## Supporting Trends

- **Mentoring 2.0.** Organizations are finding that mentoring millennials is a key tool for keeping them engaged and retaining them in the workplace. Mentoring itself is evolving, now encompassing co-mentoring, micro-mentoring, and group mentoring.
- **Training millennials.** Contrary to conventional wisdom about millennials in the workplace, the most desired benefit sought by this generational cohort is not flexible schedules or work-life balance but training and development.
- **Growing role for retraining and continuing education.** Interest in continuing education, retraining, and lifelong learning is being driven by rapid change in the workplace, employers' need for specific skills, and workers' desire to advance in their careers or make career changes.
- **HR analytics.** HR analytics (often called people analytics) is expanding to include capability analytics, competency acquisition analytics, capacity analytics, employee churn analytics, corporate culture analytics, recruitment channel analytics, and leadership analytics.
- **Business leadership deficits.** More than half the employers questioned in a 2016 survey were concerned that they will not meet future leadership needs and that their HR pipeline has a serious deficit.

### Related Drivers of Change

- 21st-Century Guilds
- Higher Education 3.0
- The Organizational Millennial

## Notable Data Points

### STAYING THE COURSE

A 2016 survey revealed that millennials who say they intend to stay with their organizations are more than **twice as likely to be receiving mentoring.**

*Source: Deloitte, Deloitte 2016 Millennial Survey*

### FILLING A NEED

**83% of professionals would like to be involved in a mentoring program,** yet only 29% are in workplaces that offer them.

*Source: Robert Walters Recruiting*

### BUILDING LEADERS

Employees who received mentoring were promoted 5 times more often than those who did not.

**Mentors were 6 times more likely to be promoted.**

*Source: Forbes*



## Strategic Insights

- Associations are in a perfect position to match mentors with those seeking mentorship. Consider using both simple and more advanced forms of technology to make appropriate connections.
- Associations should consider training programs on how to be an effective mentor and how those mentored can make best use of a mentorship.
- Working with millennials within an association can build understanding of how to engage them in developing mentoring programs at all levels.
- Technologically augmented mentoring presents an opportunity to capture institutional or domain knowledge and history. This “living” history can be stored in a digital library for future mentoring.
- Associations will have opportunities to employ
  - reverse-mentoring, in which younger members mentor more senior members to help them stay current and comfortable with the latest technology or even social and cultural issues.
  - ad hoc mentoring, in which individuals can contact experts for specific topics without committing to a longer mentoring relationship.
  - peer mentoring, with individuals meeting and learning with peers going through the same learning curve.
  - group mentoring, in which groups are formed to share in learning a new area.
- Associations should also consider how to mentor interested personnel for association volunteer and staff positions.

### Timing

- **Stage:** Growth, in a period of expansion
- **Speed:** Should move steadily forward, building continuously inside organizational structures

### Potential Alternative Futures

- **Peer mentoring:** Millennials decide there are too many differences in culture, knowledge, and technology to really learn from elder members and instead build peer mentor networks.
- **Pay for a mentor:** Unlike the past, when mentorship was organizationally supported, the new modes of work create an environment where compensation is expected for mentors and their time. This may include mentors from outside the organization.
- **Mentoring reputation systems:** Mentors are sought after and assigned based on formalized reputation metrics and past successes.



## Take Action

- **Target a specific purpose.** Associations have had mixed results with mentoring programs, especially in professions that lack a teaching and mentoring culture. Decide who your program will serve for what desired outcome. Mentoring can help encourage underrepresented people pursue a business or profession or coax people into specialty areas. Mid-career professionals may welcome help seeking leadership positions within their organizations or the association.
- **Train for success.** Both mentors and mentees should be trained to get the most of their relationship. Mentors often find they gain as much as they give.
- **Retain the tribe's elders.** Experienced, high-performing volunteers may welcome the opportunity to pass their knowledge on to successor generations. Engage them in creating a legacy through their field's next leaders.
- **Make meaningful and appropriate matches.** Mentoring is people-driven and depends on wisely matching interests and motivations. Good association management systems can handle scaling up the number of participants. Collaboration technologies can bridge distances. Social and ethical issues could come into play. Ask for feedback and keep evaluating your criteria to improve your matches.
- **Experiment with micro-mentoring opportunities.** Sometimes both mentors and mentees prefer a short-term relationship to handle a specific challenge. For example, mentees might want help following through on some knowledge or skill just learned, or in meeting the demands of a new role or assignment.
- **Offer mentoring to association staff.** Mentoring programs can engage and develop employees. Small and medium-size associations with fewer advancement opportunities may have to be creative to identify internal mentors or reach into the larger association community for assistance.

## Keyword Search

To continue researching this change driver, use these search terms:

*mentoring, mentors, talent management, peer mentoring, group mentoring, reverse mentoring, mentoring technology, mentoring programs, speed mentoring, instructional coaching, eMentors*

### Who Will Be Affected

Professional associations typically are more interested in mentoring for career advancement and leadership development. Trade associations may offer mentoring for entrepreneurs starting or expanding their businesses. Larger organizations interested in growing their employees from entry-to executive-level may have mentoring programs. Mentoring 2.0 uses technology to build beneficial relationships that can span distance and time constraints.

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# Microlearning

**SUMMARY:** Workers will need to continually learn, but many want small, specific bursts of information tied to immediate job demands, available at a time of their choosing. New media forms will enable modules that are small, timely, and focused. Certification will need to change to allow microlearning modules to be assembled in innovative combinations for new forms of certification.

## Forecasts

- Content delivery will increasingly be interactive, online, and mobile. This will require tools that make it easy for non-traditional content providers to create engaging modules on any topic.
- Classroom time, if desired or appropriate, will be devoted not to traditional lectures but to engaging in discussions or problem-solving using knowledge from microlearning modules.
- Microlearning encourages flexible learning: different times, variable locations, and a range of platforms. It may be able to support non-traditional learners and different styles of learning.
- Systems will be needed to identify the needed micro-modules in a field of study, highlight prerequisites, track completion, and incorporate the modules into sequences of certification. Sophisticated systems for learners to find and retrieve modules will also be required.

## Key Uncertainties

*How to compensate providers of microlearning modules*

•

*How to assess and validate skill levels*

•

*How to avoid poor teaching and make sure that information provided is credible and accurate*

•

*Whether universities, associations, and other traditional learning institutions support and engage in microlearning or push back*

•

*Degree of reciprocity and compatibility between different systems of microlearning*



## Supporting Trends

- **Short shelf life for digital skills.** Deloitte estimates that digital skills have a half-life of 2.5 years, so timely and easily accessible training is the only way to maintain a high level of productivity.
- **Millennials' preference for training.** According to a 2016 Deloitte Future of Corporate Learning report, 22 percent of millennials surveyed ranked training and development as their top preferred benefit.
- **Digital competencies gap.** A 2013 review of companies by Capgemini found that 90 percent lacked crucial digital capabilities—social media, performance monitoring, internal social networks, or process automation—deemed necessary for 21st-century business competency.
- **Colleges and universities under pressure.** Enrollment at U.S. colleges has been flat or falling; by one measure, enrollment peaked in 2010 and has fallen every year since, dropping fastest at for-profit colleges and community colleges.
- **Declining attention spans.** The average American's attention span in 2015 was 8.2 seconds—a serious drop from 12 seconds in 2000—seemingly due to technology-driven distraction.
- **Growth of mobile learning.** The mobile learning market is projected to be worth \$38 billion by 2020. As it grows, expect to see more social and collaborative apps in addition to gamification and videos.

### Related Drivers of Change

- Mentoring 2.0
- Higher Education 3.0
- New Forms of Work
- The Organizational Millennial

## Notable Data Points

### MICROLEARNING BY THE NUMBERS

Some studies suggest that  
**modular learning generates  
50% more engagement.**

*Source: SHIFT Disruptive Elearning*

### MORE EFFECTIVE LEARNING

Researchers at Dresden University of Technology found that  
**learners who used  
microlearning techniques  
tested 22% better**  
than learners taught using more  
conventional long-form learning blocks.

*Source: Journal of Educational Computing Research*

### MAKING TIME

More than 50% of full-time  
employees said they would be  
**more likely to use  
online training if it were  
broken into multiple,  
shorter lessons.**

*Source: Software Advice*



## Strategic Insights

- Associations have an important role in defining, developing, and delivering microlearning content. Initial modules might be focused on more well-defined, discrete topics for building specific skills, such as new technical skills. Broader and more challenging content could be added as expertise in microlearning module-development builds and awareness of microlearning's value increases.
- The ability to quickly deliver new information to members in the form of microlearning modules could position associations as an early source of new techniques and information, creating competitive value.
- Many kinds of learning modules may appeal to the general public or lay individuals. Associations may consider a different level of membership or access that allows broader access to information.
- Larger associations and learning-technology companies may consider providing tools that can be used to easily create content, enabling individuals or smaller associations to generate content based on their expertise.
- Universities and other learning providers are actively developing microlearning modules for certifications and other postgraduate education. Associations may want to work with them on microlearning structure and content.
- Microlearning modules can be developed for many non-traditional learning venues such as conferences, meetings, or online discussions.
- In addition to shorter and more convenient forms of learning, microlearning provides the opportunity to develop tailored learning modules for an individual's specific needs.

### Timing

- **Stage:** Growth stage, in a period of rapid expansion
- **Speed:** Should move rapidly, especially for niche education and training

### Potential Alternative Futures

- **Walled gardens:** Incompatible learning systems compete for reputation and credentialing.
- **Informal dominates:** Formal credit becomes too difficult and onerous, so individuals use informal systems and forego credit.
- **Universities discredit microlearning:** Defending their institutional status, traditional universities undermine systems of microlearning.
- **Everyone a teacher:** Experience with social media encourages widespread participation, flooding the system with good and bad learning modules.





## Take Action

- **Find the micro-sized opportunities in your current knowledge and education portfolio.** Tactical, skill development courses may be ideal for microlearning. You might also repurpose and repackage some conference presentations into bite-sized experiences.
- **Have a content strategy before you go micro.** Microlearning multiplies the potential experiences you can offer, so you will need a learning management system to manage the complexity. You may convert more content into short videos and podcasts. You need a different revenue model and pricing strategy than you use for major conferences and long courses. Bundling products and offering subscriptions are viable alternatives. Moving into microlearning is more difficult if your content experts own the content that drives your education programming.
- **Promote peer-to-peer learning exchange.** Content experts may jump at the chance to showcase their expertise because the time demand is less if you can plug them into an easy-to-use format and channel. People may be willing to share findings from work-in-progress and pilot programs.
- **Tie microlearning into microcredentialing.** These brief learning experiences may not comply with current continuing medical or professional education and licensing requirements. If these systems prove difficult to restructure, develop microcredentials that are stackable to earn full credentials.
- **Target the learners and markets open to microlearning.** Not everyone will prefer to learn this way. Some employers may welcome on-demand targeted learning modules. Younger members may find digital formats familiar and convenient. Mixing micro sessions into larger conferences can be challenging and confusing. Exhibitors and business partners may want to try this in the exhibit hall or as a content marketing strategy. People who might never join or attend conferences might be new markets for microlearning.

## Keyword Search

To continue researching this change driver, use these search terms:

*microlearning, learning, e-learning, education, training, elearning, educational technology, microcontent, instructional technology, microlecture, just-in-time learning*

### Who Will Be Affected

Professional associations with robust professional development programs and associations with skills training may find microlearning fits into their strategy. Technology-oriented associations are likely to be early adopters. Ultimately all industries and professions will incorporate microlearning into their workforce education and training efforts.

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# New Journal Models

**SUMMARY:** The traditional model of academic publishing is facing disintermediation by new, technology-enabled forms of scholarly communication. Open-access journals, preprint archives, and research data aggregators make it increasingly easy for researchers to bypass traditional publishing. Both traditional and non-traditional journals need to develop sustainable business models and rethink how to maintain editorial quality standards in a changing publishing environment.

## Forecasts

- Journals provide multiple functions: selection, promotion, reputation, and communication. A growing number of platforms and mechanisms will be available online to replace and disaggregate these functions.
- The internet has created a general public perception that information should be free. “Digital native” millennials are likely to reinforce this attitude, and they will push journals to reduce or shift their access costs.
- Scientific fields may grow more divided, with conflicting camps of scientists gravitating to different platforms, giving new form to rivalries among journals.

## Key Uncertainties

*Sustainable business models for journals*

•

*Impact of open access on research quality*

•

*Reforms in peer review process and new replication standards*

•

*Potential for university cutbacks in journal subscriptions as higher-education structures and economics evolve*

•

*Influence of emerging-market science programs*

•

*Public perceptions of scientists and experts*





## Supporting Trends

- **Open-access journals and documents growing.** The volume of open-access journals and documents is growing steadily.
- **Growing expectations for open science.** Government agencies and other funders increasingly require that research and publications data resulting from grants they supply be made publicly available.
- **Reimagination of scholarly communication.** A variety of current and proposed practices could restructure the entire scholarly communication process.
- **Deconstruction of the scholarly journal.** In the future, the bundled functions of the academic journal may be deconstructed into individual services.
- **Growth of scholarly data and software publishing.** Research protocols, raw datasets, research software, and data visualizations can now be published online.
- **Findings of irreproducible science sparking reforms.** A number of recent published studies suggest that a significant proportion of published science may not be reproducible; these results are sparking a variety of reforms.
- **Growth of alternative metrics for research.** Alternative measures of research impact go beyond counting citations to look at downloads, social media activity, and other indicators.

### Related Drivers of Change

- Higher Education 3.0
- Socializing Reshaped
- Who Owns the Data?

## Notable Data Points

### GROWTH IN OPEN ACCESS JOURNALS

The Directory of Open-Access Journals list of **open-access journals** included **9,455 journals** in October 2016.

*Source: Directory of Open Access Journals*

### OPEN ACCESS INFORMATION

The Bielefeld Academic Search Engine index of documents from journals, open-access repositories, and other sources grew from fewer than 10 million documents in 2007 to **more than 100 million documents in 2016.**

*Source: Bielefeld Academic Search Engine Index*

### REPRODUCIBILITY CRISIS

Several studies have estimated that **75-90%** of preclinical biomedical research in high-profile journals is **irreproducible.**

*Sources: Researchgate.net; Science, Estimating the Reproducibility of Psychological Science*



## Strategic Insights

- Associations have an opportunity to emerge as leaders in the development of alternatives to traditional publishing. Associations could lend their weight to efforts that increase the transparency and quality of scientific research, helping to ensure that innovation does not lead to lower standards.
- Associations with a lucrative income from journal publishing need to seriously address the potential for declining revenues from publishing in the future. Diversification of income sources may become increasingly necessary.
- Researchers will face additional challenges in keeping up with developments in their field, as publication options multiply. Associations could play an increasingly important role in content curation.
- Alternative media platforms can elevate and promote new voices within an association community. However, this increasingly includes quasi-research, such as white papers and content marketing briefs. Growing acceptance of “good enough” information could cause associations to “lose control” of the conversation to alternative authoritative sources.
- Associations could play a growing role as the central archive for research datasets and software tools for their community.

### Timing

- **Stage:** Growth, though new innovations are at the emergence stage
- **Speed:** Medium

### Potential Alternative Futures

- **Public funding means open access:** Grant-makers boost requirements to make publicly funded research available to the public free of charge.
- **Google Scholar:** Google or other IT innovators create online tools that make open platforms competitive with more prestigious journals.
- **Science reformed:** Initiatives to improve the quality and significance of scientific publishing are successful, and elevate the reputations of more traditional publishing outlets.



## Take Action

- **Determine if your journal is a member benefit or a resource for your field.** Other strategy and distribution decisions become easier once you clarify your purpose. If members typically access journals through their institutional libraries, they may not value member pricing access. If the journal is a resource for the field, it might pursue different priorities than your association, but could be a probe and attractor for new members in related disciplines. Deciding what to offer free or for a fee becomes clearer with a stated purpose.
- **Wake up your board to these risks to journal publishing.** Revenue and prestige may slowly erode, providing you with enough time to innovate and build toward other high-value ways to curate content, repurpose knowledge into learning, and offer a suite of services based on research and knowledge exchange.
- **Foremost, strive for quality.** Your association cannot afford to lose its authoritative voice. With more people willing to reject expertise, journals have to be vigilant about the significance and reproducibility of featured research. This extends to vetting the accuracy and impartiality of industry-funded research. Another way to advance quality research is to embrace publishing negative results and helping others learn from failures.
- **Find mutually beneficial ways to collect and host data.** Researchers want access to shared data, but the disincentives to sharing are real. Foster a dialogue to find a way forward that protects researchers' data yet advances collaboration within the field.

## Keyword Search

To continue researching this change driver, use these search terms:

*open access, open access journal, open source science, open source publishing, preprint archive, open access repositories, open science, Unpaywall, Sci-Hub, open access button*

### Who Will Be Affected

Health and medical, scientific, engineering, technical, research-oriented, and some professional associations rely on journals as a primary source of revenue and prestige. They face extensive competition from digital and open-access journals and other research platforms. Many grapple with declining submissions and impact factors as researchers vie for highly regarded journals.

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# Rejection of Expertise

**SUMMARY:** Public skepticism toward well-credentialed experts is growing, in part because of a perception that they have failed to recognize or address persistent sociopolitical problems. Expert pronouncements are having less impact on public perception, with the public turning instead to non-credentialed and “unofficial” sources for guidance and information. At the same time, information is increasingly able to route around gatekeepers, diminishing their influence and ability to shape discussion and debate.

## Forecasts

- Rejection of expertise could exacerbate polarization and make governing large structures (such as nations) and small organizations difficult due to lack of shared consensus about reality.
- There will be new “experts” whose credentials won’t come from experience or academia but rather from new skills—media training, networking, etc.—that afford them the appearance of expertise.
- A bifurcation will emerge between people who respect traditional expertise and those who don’t.
- People’s overconfidence in their own expertise has been growing for years. A shock to society—pandemic, political crisis, etc.—could be one path to reestablish the worthiness of “traditional” experts.

## Key Uncertainties

*Evolution of the media and its role*

•

*Need for information management or filtering*

•

*Success of pro-expert and pro-fact countermovements*

•

*Evolution of new kinds of consensus*

•

*Impact of populist politics*

•

*Changing role of credentials and education*

•

*Impact of the evolving economy*



## Supporting Trends

- **Political polarization and class.** Political polarization between the highly educated and those with only a high school degree is becoming more extreme in the United States.
- **Public doubts about science.** Scientists perceive that public trust in science is diminishing and, indeed, a recent poll shows some loss of optimism about science, though science is still well-respected.
- **Doubting doctors.** Americans' trust in doctors is at a 40-year low.
- **The rise of fake news.** Fake news—unsubstantiated rumors or outright falsehoods presented as fact—is a growing phenomenon that came to a head in the United States during the 2016 presidential election.
- **Erosion of trust in the media.** Americans' trust in mainstream media is at an all-time low.
- **Declining attention spans.** The American attention span is attenuating in the face of technologies that provide constant distraction and interruption.
- **“Alt tech” social media.** American political polarization is affecting technology, with the rise of an “alt tech” ecosystem that is creating alternatives to popular social media.
- **Political lenses on media.** Americans on both sides of the political divide get news from similar sources, but how they view those sources is different.

### Related Drivers of Change

- Declining Trust
- Ethical Consumption
- The Splintered Society
- Reputation by the Numbers

## Notable Data Points

### FAKE NEWS

64% of Americans surveyed believed that **fake news was causing a great deal of confusion** about the basic facts of current issues and events.

*Source: Pew Research Center*

### POLITICAL MEDIA

In a survey of news habits, **34% of Republicans reported viewing cable news as “helpful”** while only 19% of Democrats did.

*Source: Pew Research Center*

### TRUST IN DOCTORS

A 2016 survey found only **39% of Americans had “a great deal or quite a lot” of confidence** in the medical profession.

*Source: Gallup*



## Strategic Insights

- Associations are seen as institutions that embody and promote expertise, inherently or through their members. A move away from traditional expertise threatens both associations' reputations and their roles as gatekeepers. Associations will need to find ways to protect these functions, inasmuch as these functions affect the goals and missions of the association.
- At the same time, new opportunities are arising to present associations as trusted sources. As credentials (a tested or demonstrated level of knowledge) challenge expertise (a perceived mastery of knowledge), associations and other organizations can take the lead in establishing standards for credentials.
- With their experience and reputation, associations could establish a role as bulwarks against the challenge to expertise and help lead the fight for the proper role of expertise in policy and politics.
- With their expertise in media and messaging, there is a role for associations to serve as 21st-century media platforms for micro-celebrity experts. The key would be to support those aligned with the association's purpose and goals.

### Timing

- **Stage:** Continued growth, as this skepticism is being granted new levels of legitimacy
- **Speed:** Medium, for both the phenomenon and its effects

### Potential Alternative Futures

- **The ebb of populism:** A move away from populism reduces anti-expertise trends, as much of the anti-expertise impetus is driven by the strong line of anti-intellectualism undergirding populist political movements.
- **STEM to the rescue:** The fixation on STEM education as a cure-all for America's economic woes leads to a new belief in experts.
- **New education models:** New education models such as massive open online courses (MOOCs) or (semi-)professional credentialing makes education cheaper and easier to access.



## Take Action

- **Defend your brand as a trusted source.** Many associations strive to be unbiased arbiters of information and curators of quality information. You will need to practice vigilance and invest resources to defend your brand promise.
- **Be meticulous about information you use and share.** Source and validate the information you distribute through your communication channels. Use credible methodologies in your own industry research.
- **Teach critical thinking and information literacy.** Educators recognize the need to prioritize these skills. If you are in a field without established norms for evaluating information, you may need to help your members address this skills gap.
- **Fight distrust with better relationships.** People often distrust a profession but trust the professional they know and see. They accept expertise when they perceive experts care about them.
- **Confront the skepticism you earned.** In the past, your members may have acted in ways that led the public to distrust their expertise. Own these ethical failures and clean up your reputation with new policies and practices that reinforce reliable information and trustworthy behaviors.
- **Cultivate and equip a rapid response team of experts.** Misinformation spreads quickly today. Organize a trained team prepared to counter bad information with well-researched and reasoned expertise.
- **Market credentials as proof of expertise.** If you have a rigorous credentialing program that distinguishes competence, educate the public and employers about why credentialed individuals are qualified. If your credentialing program is weak, take steps to strengthen its credibility.

## Keyword Search

To continue researching this change driver, use these search terms:

*trust, experts, expertise, “credentialism,” reproducibility crisis, filter bubbles, media bubbles, trust in institutions, meritocracy*

### Who Will Be Affected

Associations with members in communications and media are at the forefront of countering public misinformation. Members of some professional, medical, and scientific societies already are experiencing loss of public confidence in their expertise. Credentialing organizations may be able to play a larger role in validating expertise. Education organizations may choose to lead in teaching information literacy and critical thinking skills.

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# A Shifting Environment for Content

**SUMMARY:** Content producers face an increasingly challenging environment. Audiences are fragmented and distracted, and they expect to be entertained and informed for free. Delivery channels are shifting rapidly for both economic and technological reasons, a trend likely to accelerate over the medium-term future.

## Forecasts

- Content personalization will steadily increase as pervasive data feeds are further filtered through automated content selection and creation.
- Innovations in micropayments and paywalls may make it easier to sell content, but charging for content will divide audiences more firmly into those ready to pay and those satisfied with free content.
- The consumption of media will increasingly be seen as a political act. Different sources will be tagged—accurately or not—as favoring one side of various political and social divides. Reading, subscribing to, or advertising in media will increasingly be perceived as political acts.
- More content creation will be automated. Automated production may take on basic information-update articles, as well as listicle-style entertainment pieces.
- Automated content-filtering systems will increasingly reveal the discrepancies between consumers' stated, actual, aspirational, and demonstrated content preferences, which are often at odds.

## Key Uncertainties

*The changing role of social media*

*Feasibility of widespread paywalls*

*Spread and nature of content personalization*

*How the media habits of millennials and post-millennials evolve*

*How quickly automated content-creation capabilities grow*

*The changing nature of attention*

*Attitudes about privacy and data gathering and use*

*Prevalence of filter bubbles and efforts to combat them*





## Supporting Trends

- **Paying for news.** The era of free online news content is ending as more newspapers erect paywalls to charge for online content.
- **Political lenses on media.** Americans on both sides of the political divide get news from similar sources, but how they view those sources is different.
- **Declining attention spans.** People's attention spans are attenuating in the face of technologies that provide constant distraction and interruption.
- **The thinning long tail.** The dominance of highly popular products and content is increasing in many areas of consumer life, decreasing the market for less popular items out on the "long tail."
- **The push for facts.** In the face of a perceived flood of propaganda and "fake news," there is a pro-truth counter-push.
- **I read it online.** Social media is increasingly the filter by which many Americans determine the news they see.
- **GIFs proliferate.** GIFs (short video clips) are a popular way for people to express a range of ideas and emotions online.
- **Social media's negative effects on health.** Use of social media is being linked to brain, behavior, and mood changes.

### Related Drivers of Change

- Nichification: Big-Data Segmentation
- Marketing and Advertising Transformation
- New Journal Models
- Microlearning
- Socializing Reshaped

## Notable Data Points

### SOCIAL MEDIA GENERATION GAPS

A 2018 study found that **18-to-24-year-olds** and those **aged 50-plus had usage gaps** on YouTube (38-point gap), Facebook (25-point gap), Snapchat (71-point gap), Instagram (55-point gap), and Twitter (31-point gap).

Source: Pew Research Center

### SHRINKING LONG TAIL

In 2006, the **top 3% of YouTube channels had 64% of all views.**

In 2016, this had **risen to 90%.**

Source: Todd C. Frankel, "Why almost no one is making a living on YouTube," *The Washington Post*, March 2, 2018.

### DOUBTS ABOUT THE MEDIA

Among Republicans and Republican-leaners polled in 2017, **85% said they thought the mainstream media have a negative effect** on the country's direction. Among Democrats and Democratic-leaners, 46% thought this.

Source: Pew Research Center



## Strategic Insights

- Curation of information for members could be offered at varying levels of precision and volume based on types of membership. Aspects of this will be served by increasing automation of scanning and extraction. Information verification can be an important part of this curation.
- Researchers have suggested that Facebook and other social media let users write their own formulas for newsfeeds. People could subscribe to others' formulas, including those created by organizations. This could be another means for associations to engage in curation via social media.
- Sharp generational differences in media use—especially social media and podcasts—suggest that associations will be required to use diverse platforms, but leaders will also have an opportunity to tailor content for age groups by platform.
- The value of trust for associations providing information will grow; it will be a comparative advantage for organizations to be viewed as sources of reliable data and viewpoints concerning their industry. Trust will also be crucial in convincing members to provide the information about themselves that can enable personalization.
- As interfaces, delivery channels, and generational expectations change, the demand for written-word information delivery to be supplemented or replaced by images, videos, and audio formats will grow.

### Timing

- **Stage:** Growth, with change underway in multiple dimensions
- **Speed:** Rapid, with some limits placed by deep-seated habits and the role of large institutions

### Potential Alternative Futures

- **Partisan media:** Most media outlets discard efforts at non-partisanship and return to the historical norm of favoring particular parties or movements.
- **Full personalization:** Automation-assisted personalization begins to dominate media feeds and reaches into the internal content of individual articles and stories.
- **Paywall palace:** Much high-quality content goes behind paywalls, accessible only to dedicated or monied readers.



## Take Action

- **Drive member value with smart content strategy.** Content is the fundamental value proposition for associations. Specialize in the content your members value and say no to distracting content that dilutes your impact. Plan how to execute content priorities across multiple formats and channels. Pilot test alternatives that disrupt your established formats and channels to capture new members and revenue.
- **Invest in personalizing content.** Technologies and data analytics are finally making it feasible to tailor content to individual member interests. Associations must invest in platforms like content and learning management systems and secure the technical expertise to personalize content. The risk of falling behind member expectations shaped by other types of content providers is real.
- **Deploy paywalls with purpose.** People are willing to pay through memberships and subscriptions for convenient, consistent access to quality analysis and carefully curated content. Deciding what to put behind a paywall can be both an ethical and a marketing choice—some content will be too critical to public wellbeing to withhold access, while letting non-payers experience good content can convert them to paying customers and members.
- **Format content for quick use and re-use.** In today's time-pressured and mobile environment, people favor succinct analysis and actionable information they can use and re-use. They want to easily share good information with their colleagues and social media networks. Longer reads need to be long on useable information and analysis to justify demand on readers' time and, should readers recommend these to their friends, reinforce sharers' reputation as knowledgeable and trusted colleagues.

## Keyword Search

To continue researching this change driver, use combinations of these search terms:

*media publishing, publishers, content, paywalls, social media, personalization, curation, attention, delivery channels, automated content creation*

### Who Will Be Affected

Associations are content generators and curators. These shifts affect their core value proposition and potentially their business models for publishing, learning, and other content activities. Some professions and jobs are more vulnerable to advances in automated content generation. Associations can support members who need their own content strategies to establish their value and relevance by providing platforms for sharing and training them to be effective communicators.

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# Virtualized Meetings

**SUMMARY:** Ubiquitous broadband, the mainstreaming of virtual reality, and robotics are accelerating the capabilities of telepresence technologies. These technologies could enable the telepresence of both speakers and participants at meetings. Or meetings could take place entirely in a shared digital reality. While these technologies can broaden participation and generate novel experiences, the social and experiential benefits of “real life” may prove challenging to replicate.

## Forecasts

- A growing bifurcation between real-world and virtual meetings may occur. Information delivery may migrate to virtual reality (VR) meetings, while socializing and networking become the primary goals of real-world meetings.
- Augmented reality (AR) shows signs of developing quickly as a meeting technology.
- Meeting participants may rapidly acclimate to interacting with non-local participants. Video chat interactions have already become normalized, making it less daunting to interact with a Facetime-equipped telepresence robot.
- The post-Millennial generation will include “VR natives” who find hybrid and virtual forms of person-to-person interactions more natural.

## Key Uncertainties

*Ability of telepresence technology to deliver the networking and social interaction components of meetings*

•  
*Ability of virtual reality to replace live product demonstrations*

•  
*New capabilities of telepresence technology that traditional meetings cannot match*

•  
*Generational preferences for online versus face-to-face socializing*

•  
*Ability of Facebook, the owner of VR firm Oculus Rift, to mainstream virtual reality socializing*



## Supporting Trends

- **Virtual reality growth.** Virtual reality has hit the mainstream, and will grow as an entertainment and communication platform.
- **Augmented reality.** Augmented reality offers useful ways to visualize data in real-world environments, and is being deployed on platforms including smartphones.
- **VR and AR as marketing channels.** Marketers are beginning to explore virtual reality and augmented reality as formats for delivering compelling consumer experiences.
- **Virtual volunteering.** Younger volunteers are providing online services, especially for cause-driven organizations, by engaging through social media or extending an advocacy or fundraising campaign to their social networks.
- **Security concerns for meetings.** Security concerns are a rising priority in the meeting and events industry.
- **Reimagining scholarly communications.** Innovations such as open review, post-publication review, and continuous revision could restructure the entire scholarly communication process.
- **Connecting online and real-life lives.** People are taking their online friendships offline into the real world via apps.

### Related Drivers of Change

- New Forms of Work
- New Journal Models

## Notable Data Points

### VR A GROWING INDUSTRY

International Data Corp. forecasts that the market for VR and AR systems **will grow** from \$5.2 billion in 2016 **to more than \$162 billion** in 2020.

*Source: IDC's Worldwide Semiannual Augmented and Virtual Reality Spending Guide*

### VR FOR PROMOTION AND MARKETING

According to Digi-Capital, corporations and venture capitalists invested **\$2.3 billion** in virtual and augmented reality in 2016, **up from \$700 million-plus** in 2015.

*Source: [www.digi-capital.com/news](http://www.digi-capital.com/news)*

### AR IN BUSINESS

A Microsoft AR initiative enables teams of structural engineers to **cut costs and boost efficiency** by having remote teams capture high-resolution images of damaged bridges. The data are then projected onto a 3D computer model of the damaged bridge, enabling the engineers to make a damage assessment.

*Source: [Neowin.net](http://Neowin.net)*



## Strategic Insights

- Today, most meetings are designed around content and programming, with social interactions a secondary consideration. Virtualized meetings could alter how participants use and value real-world meetings, potentially boosting the importance of designing and programming the social experiences of participants at live meetings and events.
- Virtualized meetings could foster new hybrid meeting forms. Local chapters could meet face-to-face and then connect virtually to a live national or international meeting. A hybrid format could boost participation in national meetings and simultaneously deepen personal ties in local chapters.
- The rise of virtualized meetings could lead to a variety of meeting formats: VR-only, hybrid, and face-to-face. Each type will likely have its strengths and weaknesses—heightening the importance of having strong delineation and branding among the different meeting types.
- Consumers have become conditioned to pay less for digital content than for “real” content. VR meetings may face a similar pricing challenge and require greater interactivity among participants to justify a premium price point.

### Timing

- **Stage:** Growth, though at an early stage
- **Speed:** Rapid and accelerating

### Potential Alternative Futures

- **Meetings in the matrix:** Personal avatars and a shared online environment re-create real-world meetings in purely digital forms.
- **Luxury and physical presence:** Face-to-face meetings evolve into a premium category for meetings and events.
- **VR as a wildcard:** VR develops a “killer app” for virtual meetings, which puts real-world meetings at a disadvantage.
- **VR goes down-market:** The popularity of VR porn and gaming applications tarnishes perceptions of the technology.





## Take Action

- **Be strategic in deciding when to take advantage of virtual meeting capabilities.** Live meetings remain popular with members. Experiment to test member interest and gain the skills to offer virtualized meetings. Initially consider taking a hybrid or mixed-channel approach to test member preferences without undermining proven conferences.
- **Analyze your education and professional development portfolio to identify offerings ripe for virtualization.** Search for ways to reach and serve people who may be less able to attend in-person meetings, such as students and those with limited money or time. You may need to update credentialing and licensure requirements that skew toward in-person learning experiences to accommodate virtual learning. When issues can't wait until the next major meeting, use virtual platforms to nimbly educate, organize, and mobilize members.
- **Use virtual meeting technologies to improve communication efficiency while lowering cost.** Hold more virtual meetings to cut governance expenses, but be careful not to erode personal connections and trust to save money. Global and national organizations and their regional and local affiliates will be able to build closer working relationships. Virtual technologies are a powerful and affordable way to reach the general public on critical issues. Virtual doesn't mean free: you will need a budget and pricing strategies that manage member expectations yet offset additional costs.
- **Identify technology partners and meeting facilities able to support virtualized meetings.** Good wi-fi access and sufficient bandwidth are not yet widely available. Meeting production companies should be a resource for deploying these capabilities. Associations should be mindful that corporate security measures may restrict access and participation for some members.

## Keyword Search

To continue researching this change driver, use these search terms, combining one “virtuality” term with one “meeting term”:

**VIRTUALITY TERMS:** *AR, augmented reality, virtual reality, virtual, VR, telepresence, hybrid, mixed reality*

**MEETING TERMS:** *event, meeting, conference*

### Who Will Be Affected

Most organizations can take advantage of virtual, augmented, or hybrid approaches to meeting design and communication. Some industries are experiencing greater digital disruption of their business models. Associations in areas such as science, technology, and entertainment may face greater demands to deploy these capabilities. The corporate meeting world is ahead of associations in deploying these capabilities.

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# Data and Technology Action Set

The data economy and its accompanying technology are changing our world and how we live in it. A 2017 article in *The Economist* suggests, “Data are to this century what oil was to the last one: a driver of growth and change. Flows of data have created new infrastructure, new businesses, new monopolies, new politics, and—crucially—new economics.”<sup>1</sup> The growth rate of data is mindboggling. The research group IDC has projected that in 2025, the quantity of digital data produced in that year alone will be 163 zettabytes.<sup>2</sup> While the growth in quantity is impressive, the quality and value of data are also growing. IDC has projected that revenues from big data and data analytics will increase at a compound annual growth rate of 11.7 percent, from \$130.1 billion in 2016 to more than \$203 billion in 2020.<sup>3</sup>

<sup>1</sup> “Data is giving rise to a new economy,” *The Economist*, May 6, 2017, <https://www.economist.com/news/briefing/21721634-how-it-shaping-up-data-giving-rise-new-economy>.

<sup>2</sup> IDC, “Data Age 2025,” <https://www.seagate.com/www-content/our-story/trends/files/Seagate-WP-DataAge2025-March-2017.pdf>.

<sup>3</sup> Gil Press, “Six Predictions for the \$203 Billion Big Data Analytics Market,” *Forbes*, January 20, 2017, <https://www.forbes.com/sites/gilpress/2017/01/20/6-predictions-for-the-203-billion-big-data-analytics-market/#192d89af2083>.





The data revolution presents an opportunity for associations to be more effective and proactive in all areas of their operations. To assist with this vital task, the ASAE Foundation collaborated with a research team from Signature i and Foresight Alliance to create the ASAE ForesightWorks Data and Technology Action Set. The action set includes ten action briefs that introduce the drivers of change that will shape the future direction of data and its associated technologies. Each action brief explores forecasts, implications, and potential responses for organizations as they move forward.

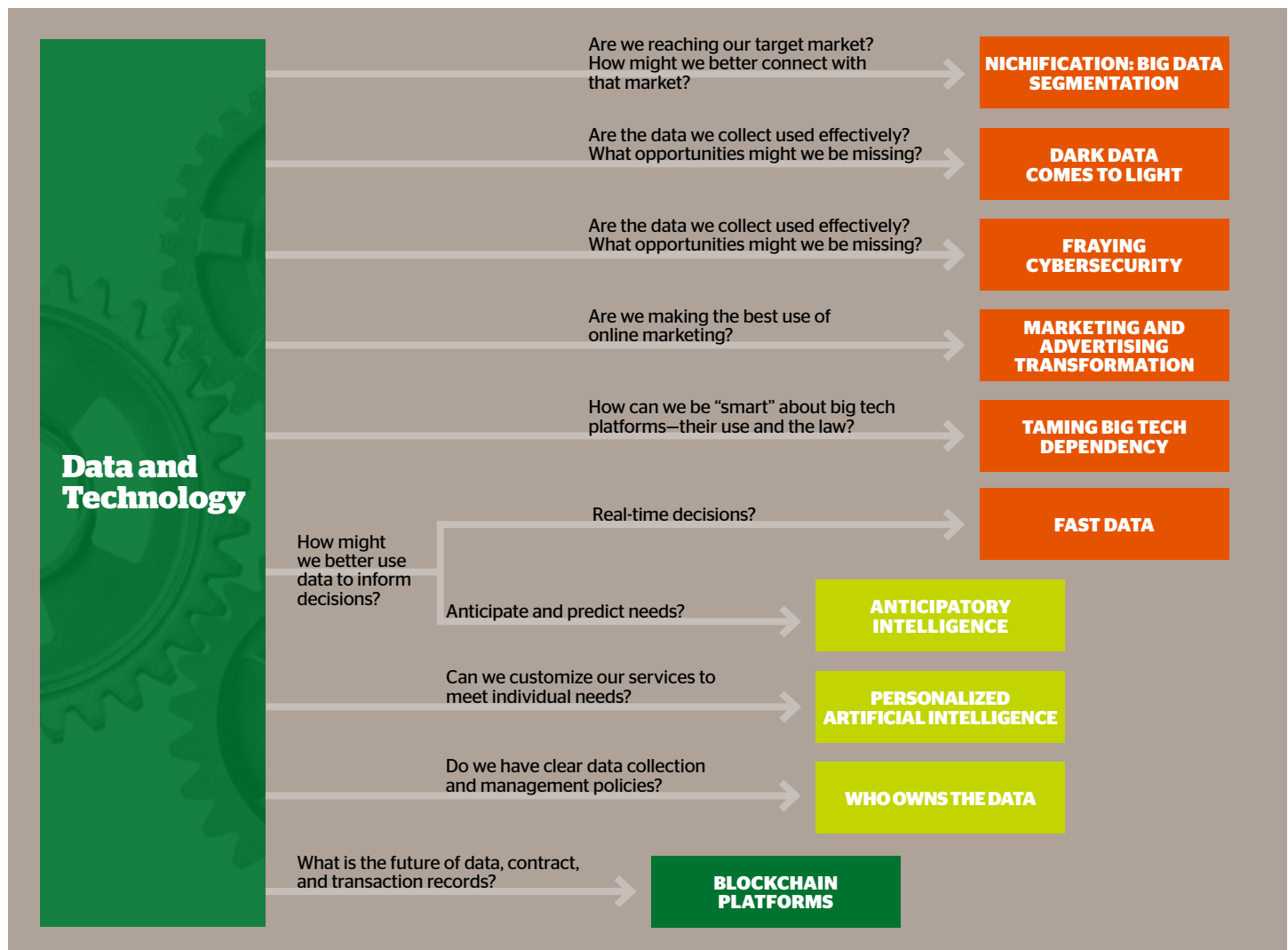
## Putting the Drivers of Change Into Context

The accompanying graphic connects each of the drivers of change to key questions related to the future of your organization or industry. The action briefs are designed to stimulate your thinking about implications, actions, and possible outcomes, as well as to inform and inspire new directions for your strategic planning, risk management, innovation, and environmental scanning efforts.

### KEY:

- Moving fast
- Medium speed or emergent
- More time to plan and prepare

Source: ASAE ForesightWorks





## The Elements of an Action Brief

Each action brief consists of four pages. These pages have been designed to work together or to be used independently for different purposes and audiences.

Page one can serve as a standalone page that summarizes the driver of change and its importance, or as an introduction to the other pages. This page provides a summary paragraph, forecasts—“probable futures” given the current trends and data—and key uncertainties—the “known unknowns” that need to be watched and considered when making downstream forecasts.

Page two is the supporting data page. This page elucidates some of the key trends that informed the forecasts, points to related ASAE ForesightWorks action briefs to help readers develop a comprehensive view, and provides a couple of supporting data points. The page provides evidential support for the forecasts described on page one.

Page three is the strategic insights page. Here you'll find material to help you discuss the driver of change in a strategy session. The page includes broad insights, the projected timing and speed of the change, and some potential alternative futures—possible (though not probable) futures that should be considered from a risk management perspective.

Page four suggests potential actions. This page offers specific steps for addressing the change, identifies the types of organizations expected to be affected, and keywords to support continued research in this action brief area.

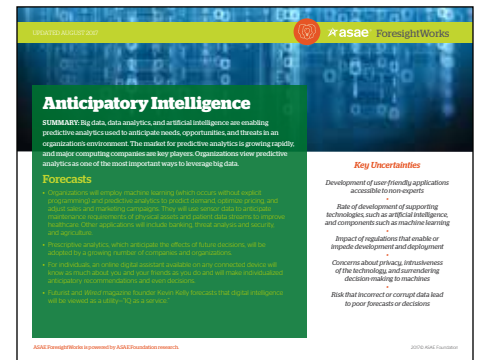
More in-depth guidance for thinking through and working with the action briefs, either on your own or with a group, can be found in the ASAE ForesightWorks User's Guide.

## Strategic Discussion Questions

Initial strategic questions are suggested here as a means of prompting discussion around the action brief set. You may want to choose a subset of the questions or create new questions to have a more targeted conversation with your group.

### Future implications

- What might the organization be like in five or 10 years if its use of data and technology changed along the lines suggested by the action briefs?
- How do you think members would respond to a focus on advancing digital data awareness and skills?





## Opportunities and challenges

- What new services could this knowledge inspire us to provide?
- How do we best leverage the data we have now? What else could we easily be doing?
- Are we doing the right things now to protect our own and our members' data? Are we honoring members' expectations and commitments around data use?
- How can we be proactive toward new and emerging technologies?

## Building awareness

- What do we know about our legal responsibilities related to our data?
- What policies do our business partners have concerning data? What are some of the best data management practices used by other associations?
- Do we have a plan to recover from data loss or theft?

## Additional Reading

These articles provide more insight into the drivers of change. They can be shared ahead of a discussion to familiarize the group with the concepts and possibilities captured by the action briefs.

- Forbes on "10 Charts That Will Change Your Perspective Of Big Data's Growth." <https://www.forbes.com/sites/louiscolombus/2018/05/23/10-charts-that-will-change-your-perspective-of-big-datas-growth/#6ee9597d2926>
- McKinsey's "Notes from the AI frontier: Applications and value of deep learning." <https://www.mckinsey.com/business-functions/mckinsey-analytics/our-insights>
- Forbes on "What You Need To Know About Cybersecurity In 2018." <https://www.forbes.com/sites/laurencebradford/2018/03/30/why-people-should-learn-about-cybersecurity-in-2018/#112d55e95d00>
- Deloitte Insights on "Dark Analytics: Illuminating Opportunities Hidden within Unstructured Data". <https://dupress.deloitte.com/dup-us-en/focus/tech-trends/2017/dark-data-analyzing-unstructured-data.html>
- Arup Foresight on "Blockchain Technology: How the Inventions behind Bitcoin are Enabling a Network of Trust for the Built Environment". <http://www.driversofchange.com/projects/blockchain-technology-how-the-inventions-behind-bitcoin-are-enabling-a-network-of-trust-for-the-built-environment/>

ASAE ForesightWorks is powered by ASAE Foundation research.





The authors have worked diligently to ensure that all information in this work is accurate as of the time of publication and consistent with standards of good practice in the general management community. As research and practice advance, however, standards may change. For this reason it is recommended that readers evaluate the applicability of any recommendations in light of particular situations and changing standards.

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# Anticipatory Intelligence

**SUMMARY:** Big data, data analytics, and artificial intelligence are enabling predictive analytics used to anticipate needs, opportunities, and threats in an organization's environment. The market for predictive analytics is growing rapidly, and major computing companies are key players. Organizations view predictive analytics as one of the most important ways to leverage big data.

## Forecasts

- Organizations will employ machine learning (which occurs without explicit programming) and predictive analytics to predict demand, optimize pricing, and adjust sales and marketing campaigns. They will use sensor data to anticipate maintenance requirements of physical assets and patient data streams to improve healthcare. Other applications will include banking, threat analysis and security, and agriculture.
- Prescriptive analytics, which anticipate the effects of future decisions, will be adopted by a growing number of companies and organizations.
- For individuals, an online digital assistant available on any connected device will know as much about you and your friends as you do and will make individualized anticipatory recommendations and even decisions.
- Futurist and *Wired* magazine founder Kevin Kelly forecasts that digital intelligence will be viewed as a utility—"IQ as a service."

## Key Uncertainties

*Development of user-friendly applications accessible to non-experts*

•

*Rate of development of supporting technologies, such as artificial intelligence, and components such as machine learning*

•

*Impact of regulations that enable or impede development and deployment*

•

*Concerns about privacy, intrusiveness of the technology, and surrendering decision-making to machines*

•

*Risk that incorrect or corrupt data lead to poor forecasts or decisions*



## Supporting Trends

- **Predictive analytics.** Organizations are adopting predictive analytics to develop anticipatory knowledge. Predictive analytics use techniques from statistics, data mining, and machine learning to identify patterns in datasets.
- **Anticipatory ambient intelligence.** Technology visionaries see ambient intelligence as the outcome of pervasive connectivity, ubiquitous sensing, and the spread of artificial intelligence. In such a vision, devices of all kinds closely monitor consumers and work to understand personal behavioral patterns and seamlessly anticipate needs.
- **Big data and marketing.** More effective use of big data will support a wide variety of new marketing capabilities.
- **Algorithmic microtargeting.** Social media platforms can enable customized and personalized marketing appeals.
- **Markets of one.** The “long tail” continues to stretch as customers increasingly expect products, services, and experiences that cater to their uniqueness. Big data and data analytics are enabling new levels of personalization in marketing.
- **Learning from machine learning.** While the focus on machine learning has been what machines can do, early research is showing that humans are learning from artificial intelligence as well.
- **Big investors.** According to Global Industry Analysts, key players in the predictive analytics market include IBM, Dell, Oracle, SAP, and Microsoft.
- **Top business priority.** In a 2015 IBM-sponsored Ventana Research study, “organizations ranked predictive analytics as the most important analytics category for working with big data.”

### Related Drivers of Change

- Personalized AI
- Fast Data
- Nichification
- Algorithmic Politics

## Notable Data Points

### GROWING MARKET - OVERALL

The global predictive analytics market will reach  
**\$4 to \$9 billion**  
by 2020, according to various forecasts.

Source: MarketsandMarkets and Global Industry Analysts, Inc.

### GROWING MARKET - HEALTHCARE

The healthcare market for predictive analytics is forecast to total  
**\$19 billion** by 2025.

Source: Research and Markets's "Healthcare Predictive Analytics Market Analysis By Application, By End-Use, By Region And Segment Forecasts, 2014 - 2025"

### GROWING DATA

Global Internet traffic is forecast to grow at a 22 percent compound annual growth rate from 2015 to 2020, reaching  
**25 gigabytes per person per month.**

Source: Cisco's "The Zettabyte Era: Trends and Analysis"



## Strategic Insights

- Predictive analytics may be useful for forecasting demand for association products and services—for example, attendance at upcoming conventions or interest in specific training.
- Some associations have the opportunity to develop domain-specific expert predictive systems and offer anticipatory services and consulting to members.
- There may be opportunities to catalyze the development of predictive analytic systems that integrate the expertise of multiple member associations.
- Marketers and advertisers will need access to data from the anticipatory and prescriptive ecosystems used by their customers. Associations will need to develop relationships with systems used by members and prospects.
- Members and associations will need to agree to share data at various levels to take advantage of anticipatory technologies. Sharing will raise privacy, transparency, and competitive issues.
- Predictive and prescriptive analytics will be subject to risks including hacking and dark uses of hacked data.
- Predictive and prescriptive analytics reduce the need for routine decision making, but it will be important for associations (like all users) to avoid over-reliance on the technology.

### Timing

- **Stage:** Growth stage in many applications, emerging in others
- **Speed:** Medium to rapid change, with potential technical, regulatory, and public acceptance barriers

### Potential Alternative Futures

- **Hamstrung by doubts:** Concerns about intrusiveness and surrendering authority to machines limit adoption of predictive artificial intelligence.
- **Privacy problems:** Backlash against perceived surveillance and privacy violations limits adoption.
- **Catastrophic failure:** A major failure of anticipatory technology—for example, failure of predictive analytics in autonomous vehicles—causes widespread rejection of the technology.
- **Machines take over:** The success of predictive analytics hastens the intrusion of ubiquitous intelligence into everyday life—artificial intelligence becomes inescapable.



## Take Action

- **Inventory and improve the current integrity of your data and management processes.** Many associations need to increase data integrity, secure more member data than they now have, and integrate different databases and systems. This will require a technology plan and budget to make improvements.
- **Acquire data analytics proficiency.** Many associations will need to hire staff or consultants who can help establish a data-driven culture and processes. Current staff will also need additional training. Board members will need assistance in using data in decision making.
- **Use data to inform your strategy and business decisions.** Associations may be able to personalize and recommend appropriate services and content to members. Associations may be able to develop new markets for existing products. Predictive and prescriptive analytics could become a more reliable way to gauge member needs and interests than current surveys and focus groups. Associations will be better able to detect and define member networks and exploit these network relationships.
- **Clarify privacy and data management policies and practices.** Data security and privacy concerns will become important as members realize how much their associations know about them. Associations with multiple divisions or chapters may have to insist on consolidated data and standard processes of data management. Business partners and exhibitors may ask for access to data to target likely buyers; while this might erode interest in trade shows and general advertising, it could open up new sources of revenue.

## Keyword Search

To continue researching this change driver, use these search terms:

***predictive analytics, data analytics, artificial intelligence, machine learning, big data, digital assistant, predictive algorithms, decision support, smart systems***

### Who Will Be Affected

Better-resourced organizations may be in a better position to invest in systems capable of supporting sophisticated data analytics. Individual membership organizations will have greater access to data than trade associations may have. For trade associations, the opportunity could be in pooling and analyzing industry data. Technology partners and association management companies may enable smaller associations to access these capabilities.

### About ASAE ForesightWorks

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- regularly updated action briefs;
- tools for applying insights from the research in your association;
- guidance in performing environmental scans; and
- opportunities to engage with peers around the research.

Ultimately, the program's mission is to empower association leaders to create a culture of foresight in their associations and to lead their organizations confidently into the future.

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# Blockchain Platforms

**SUMMARY:** Blockchain technology uses a distributed digital ledger to record data, contracts, and transactions, financial and otherwise, without the need for third-party validation. While bitcoin was the first proof-of-concept for the efficacy of blockchains, blockchains have applications beyond virtual currencies. By embedding trust in the algorithms of the blockchain, blockchains can enable trustless transactions and data exchanges, eliminating the need for supervision by intermediaries or government authorities.

## Forecasts

- The financial services sector is working to mainstream blockchain. Stable and secure blockchain platforms could drive decentralization of global finance by embedding trust and transparency into blockchain platforms.
- Blockchain is likely to be a disruptive technology. While incumbent firms are introducing the technology, blockchain platforms are likely to create opportunities for new entrants and entirely new types of services.
- Blockchain platforms will be developed for a wide variety of non-financial applications, such as education credentialing, worker-reputation systems, and supply chain management.

## Key Uncertainties

*Ability of incumbents to capture the emerging blockchain market*

•

*Scalability of blockchain to handle millions of simultaneous transactions*

•

*Security of blockchain and ability to resist hacking and subversion*

•

*Willingness of HR and credentialing institutions to adopt blockchain technologies*



## Supporting Trends

- **Companies on blockchain.** New companies are being created on blockchain software, such as distributed autonomous organizations (DAO), a kind of corporation that exists as software code and smart contracts.
- **Commercialization of blockchain.** Blockchain technologies are being commercialized into mainstream financial products.
- **Smart contracts.** Smart contracts could replace conventional contracts with algorithmically enforced digital agreements.
- **Criminal use of blockchain.** Blockchain is being used in criminal activities ranging from identity theft to drug trafficking and money laundering.
- **Blockchain for cybersecurity.** Blockchain's inherent security features are being applied to a multitude of cybersecurity issues.
- **Internet of things.** The internet of things (IoT) is the next wave of internet development, extending internet connectivity and interaction to billions of objects and devices.
- **Data-trail control.** People are generating vast data trails of personal information, leading to growing questions about who should own and control that data.

### Related Drivers of Change

- Anticipatory Intelligence
- Declining Trust
- Reputation by the Numbers
- Ethical Edge of Innovation

## Notable Data Points

### MAINSTREAMING BLOCKCHAIN

The World Food Programme's use of Ethereum cryptocurrency as a payment mechanism for food aid **saved \$150,000 a month by eliminating 98% of bank transfer costs.**

*Source: Jonathan Tirone, "Banks Replaced With Blockchain at International Food Program," Bloomberg, February 16, 2018.*

### BLOCKCHAIN GROWTH

Global spending on blockchain development and services is **forecasted to grow from \$1.8 billion in 2018 to \$8.1 billion in 2021.**

*Source: International Data Corporation*

### BLOCKCHAIN SCALABILITY

The Mitsubishi UFJ Financial Group and Akamai Technologies are developing a scalable blockchain that, when mature, will be able to handle up to **10 million transactions per second.**

*Source: Robert Hackett, "Japan's Biggest Bank to Switch on Blockchain Payments in 2020," Fortune, May 21, 2018.*



## Strategic Insights

- Blockchains can be applied to credentialing, simplifying the verification of degrees and certifications. Associations could accelerate this process by developing or participating in blockchain-based certification platforms. This could bolster the credibility of credentials created by new approaches to microlearning, distance education, or continuing education.
- Blockchains could be used in scientific publishing to validate and archive the underlying datasets used in studies. This could increase the credibility of research and make it easier for scientists to attempt to replicate scientific findings.
- Blockchains could enhance the transparency of emerging worker-reputation systems, providing an unalterable record of verified evaluations. Associations could certify their members in such blockchains or start more ambitious initiatives for specialized reputation blockchains within their industry.
- Blockchains can be used to verify the provenance of products across distributed global supply chains. Associations could collaborate with companies or other industry associations to develop inter-industry blockchains that provide supply chain transparency and security.

### Timing

- **Stage:** Emerging
- **Speed:** Medium, though early innovation is happening rapidly

### Potential Alternative Futures

- **Blockchain blowup:** Blockchains prove inefficient at mass scale, or too insecure for critical transactions. The technology is only adopted in small niches and is rejected by the mainstream.
- **Blockchain takeover:** Financial services companies jumpstart early blockchain applications. They successfully use blockchains to transition into the next era of financial services.
- **Blockchain disruption:** Blockchain services are introduced by upstart firms, directly competing with industry incumbents. Over time, these services gradually erode the power of dominant transaction gatekeepers.



## Take Action

- **Alert members to emerging technologies.** Associations need to be constantly scanning the horizon for emerging technologies like blockchain, clarifying their utility, and explaining why and how members might use them. Association boards should regularly explore the implications of new technological capabilities.
- **Help members learn faster.** Associations are safe places to gain expertise in emergent capabilities. Identify pioneering members willing to share what they are learning. Provide timely learning experiences and briefs to get your members up to speed. Look to early-adopting industries to explore how they are using new technologies to solve similar problems your members have.
- **Define potential use cases for your industry.** Blockchain platforms offer potential solutions for data-intensive transactions that now require third-party verification. Many uses are likely to be internal rather than customer-facing. Associations can research these uses and help accelerate development by convening members eager to collaborate in research and development.
- **Keep standards and regulations in sync with new technologies.** Blockchain is a good example of an alternative solution proposed in areas now subject to extensive standards and regulations. Could blockchain platforms offer a way to efficiently verify regulatory compliance or even replace cumbersome and restrictive systems? Standard-setting organizations have to look ahead to consider the implications and possibilities.
- **Consider cryptocurrencies' potential for international transactions.** Global associations may get member requests to use cryptocurrencies to minimize the cost of currency exchange for everyday association transactions like paying member dues, conference registrations, and other purchases. Even if bitcoin isn't yet a viable solution, an alternative and universal payment system might someday exist.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *blockchain, distributed ledger, bitcoin, Altcoins, Ethereum, cryptocurrency, smart contracts, blockchain applications, BankChain, fintech, finance, proof of stake, ICO, initial coin offering, utility coin*

### Who Will Be Affected

Trade associations in industries that need greater efficiency and transparency in data-intensive transactions will be working to pilot test and scale up blockchain platforms. Professional associations training people for these industries will need to help members learn and anticipate these developments. Business and technology partners will be essential to bringing these new capabilities online.

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# Dark Data Comes to Light

**SUMMARY:** The drive to leverage big data will lead to more data-gathering and better use of existing data. According to Gartner, dark data are “information assets that organizations collect, process, and store in the course of their regular business activity but fail to use for other purposes.” A significant fraction of sharing on the internet is “dark social,” sharing links via instant messaging, email, and text—communication that often is not recorded or studied. New approaches will allow better gathering, management, and exploitation of ever-expanding data.

## Forecasts

- Industries that will leverage dark data to innovate and improve productivity include travel, manufacturing, and publishing.
- Dark data will be used to gain deeper insight into individual consumers and consumer cohorts.
- Because dark data are generally unstructured, the growth of advanced analytical tools will provide new access to insights hidden in dark data.
- The “data lake” approach—capturing all data that flow into the organization while imposing a bare minimum of upfront shaping and processing—may offer a cost-effective way to manage expanding volumes of structured and unstructured data.



## Key Uncertainties

*Return on investment from dark data exploration and mining*

*Extent to which the explosion of data overwhelms the ability to store and process it*

*Shifting views of privacy, data transparency, and data ownership*

*Extent to which information remains separated in multiple silos*

*Evolution of standards for data structures and interfacing*

*Shifts in regulations on data use*





## Supporting Trends

- **Dark data as revenue generator.** “Dark data” is becoming a revenue generator, with many free online services profiting from customer analytics.
- **Dark social sharing.** Web analytics are not tracking the bulk of social sharing on the internet.
- **Rise of the data lake.** Companies are turning to the “data lake” model to manage rapidly accumulating organizational data.
- **From big data to fast data.** Increasingly, the value from big data is coming from the immediacy of the decision making it supports.
- **Predictive analytics.** Companies are adopting predictive analytics to turn their data into anticipatory knowledge.
- **Mobile phone data for social research.** Researchers are using datasets of mobile phone usage to study a wide range of human behaviors.
- **Data-trail control.** People are generating vast data trails of personal information, leading to growing questions about who should own and control that data.
- **Cybersecurity.** Risks to digital infrastructures are growing, even as dependence on them rises.

## Related Drivers of Change

- Fast Data
- Who Owns the Data?
- Algorithmic Politics
- Anticipatory Intelligence
- Security Systems Under Pressure

## Notable Data Points

### USING DATA WISELY?

An antiquated demand-forecasting process is estimated to cost United Airlines **almost \$1 billion per year in lost revenue.**

*Source: CRAIN's Chicago Business*

### DARK DATA VOLUME

A 2016 report, surveying organizations in 14 countries estimated that 14% of stored data is business-critical, 32% is redundant, obsolete, or trivial, and **54% is dark data “whose value has not yet been identified.”**

*Source: Veritas Technologies*

### DARK SHARING

According to a 2016 report, **“84% of consumers’ outbound sharing from publishers’ and marketers’ websites now takes place via private, dark social channels”** —instant messaging, email, and text.

*Source: RadiumOne*



## Strategic Insights

- Dark data have the potential to add business value by strengthening consumer understanding, improving predictive analytics of all kinds, and even providing new revenue streams.
- As data flow and storage grows, associations will need to identify and evaluate dark data (is it useful or is it redundant, obsolete, or trivial?) and review their strategy for data gathering, storage, and analysis.
- Control of data is a potentially sensitive issue, because dark data—especially dark social data—that are captured and analyzed could contain sensitive personal information, raising privacy and ownership concerns. Such data will have to be properly protected to avoid costly breaches.
- Mobile phone data in particular will provide a rich information source for social science research, and possibly for as-yet unexplored commercial applications.
- The gathering and use of dark social data to more finely target online communication could create uneasiness—is the targeting helpful or is it intrusive?
- The mining of personal and behavioral data, especially in complex or unstructured data environments, carries with it the potential for unintentional algorithmic discrimination.

### Timing

- **Stage:** Growth, as data streams explode and identification and evaluation of dark data improves
- **Speed:** Rapid expansion of data volumes, while efforts to manage data struggle to keep up

### Potential Alternative Futures

- **Moore's law limit:** A slowdown in the growth of data storage and processing power puts limits on data gathering and analysis.
- **Cybersecurity:** Real and/or perceived issues with data security limit the types of information that can be stored, forcing organizations to review and discard some types of dark data.
- **Consumer backlash:** Consumers demand full visibility of and control over personal information, forcing organizations to review existing data and cease collection of some types of new data.
- **Privacy? Whatever!** Transparency becomes the accepted norm and consumer concern vanishes.



## Take Action

- **Develop an ability to continuously monitor member attitudes and behaviors.** Watch online behavior, social media content, and other transaction data to better understand what members want. In time, this will become an efficient source of market and member research.
- **Use data morally and ethically.** Associations can do a lot more through data mining and analysis now than they may want to attempt. You have a trust relationship with members. Have transparent policies that permit opting out. Make a staff member responsible for determining what data can be used.
- **Supplement survey research with behavioral data.** What people report they will do or believe in surveys can be contradicted by how they behave. To fully inform your decisions, look to transactional data to test the validity of any assumptions.
- **Use data to solve puzzling problems.** A deep dive into industry data can pinpoint specific problems and fine-tune best practices. These benchmarking data are often sensitive, and members need assurance as to the purpose and security provisions before agreeing to participate.
- **Don't let important data be dark.** If you cannot connect useful information about individual members across databases, it is effectively inaccessible to your association. For example, people provide good write-in commentary on surveys that is rarely connected to their member records or followed up on.
- **Have policies about third-party sharing.** Business partners are eager to know what you know about member interests. Some business partners may have valuable information about your members that you actually need. Navigate these evolving relationships consistent with how your members want their data protected.

## Keyword Search

To continue researching this change driver, use these search terms:

*data mining, data analytics, dark data, unstructured data, Hadoop, big data, data lake, dark social, internet of things, data rot, data ownership*

### Who Will Be Affected

Consumer-oriented businesses are escalating their surveillance ability to access data to target individuals and boost sales. Most associations lack the technical ability to do this level of data analysis or their data are unstructured and stored in ways that prohibit bringing dark data to light.

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# Fast Data

**SUMMARY:** “Fast data” emphasizes real-time decision making, based on the idea that the greatest value from data comes when the analytics can be used immediately. Examples include fraud detection, recommendation engines, personalization, and real-time demand forecasting. In all of these cases, the value comes from quickly processing and acting on the data—and this value can diminish quickly as the data get stale.

## Forecasts

- While the trend toward big data represented a change in the scale and structure of static data, fast data will impose new challenges because the analysis and recommended actions must occur nearly instantaneously.
- Artificial intelligence and expert systems may be required to monitor and respond to data at sufficient speed. The role of human analysts may shift toward training fast data systems to do analysis in real time.
- The trustworthiness of fast data analytics will be a growing concern. The speed and continuous nature of fast data mean that the underlying assumptions of the data model can change faster than conventional analytics. Even if a fast data system is working well, analysts will need to routinely test their fast data models to verify that they are accurately reflecting current reality.

## Key Uncertainties

*Who has access to what information*

•

*Whether analytics insights can be verified or are “black box” systems*

•

*Whether data are public and shared or private and proprietary*

•

*Ability to extract the signal from the noise in real time*

•

*Tradeoffs of being an innovator versus a fast follower*



## Supporting Trends

- **Predictive analytics.** Predictive analytics uses techniques from statistics, data mining, and machine learning to identify patterns in datasets. This enables organizations to use their data to better anticipate changes occurring in their environments.
- **Self-service business intelligence.** Self-service business intelligence moves data modeling and analysis out of the IT department and into the hands of business users. This can remove analytical bottlenecks and free business users from dependence on their IT departments.
- **Rise of the data lake.** Companies are turning to the “data lake” model in which a firm’s data are stored in a single information reservoir in its original format, and then transformed or reshaped into more standardized datasets or imported to formal data warehouses depending on business need.
- **The internet of things.** The internet of things (IoT) is the next wave of internet development, extending internet connectivity and interaction to billions of objects and devices.
- **Cybersecurity.** Digital infrastructures face risks from increasingly sophisticated criminal hackers, non-state actors, and growing international cyber-warfare capabilities.

### Related Drivers of Change

- Fraying Cybersecurity
- Personalized Artificial Intelligence
- Who Owns the Data?
- Dark Data Comes to Light

## Notable Data Points

### CHEAP AND UBIQUITOUS SENSORS

Global microelectromechanical systems-based sensor sales **will grow from \$4.8 billion** in 2016 to an **estimated \$6.1 billion** in 2020.

Source: eeNews Europe

### DATA FLOWS FROM THE INTERNET OF THINGS

**Growth for the IoT is forecast to be rapid,** with market analysts forecasting “that the IoT market will grow from an installed base of 15.4 billion devices in 2015 to 75.4 billion in 2025.”

Source: IHS Markit

### CYBERSECURITY AND DATA PROTECTION

**80% of common IoT devices have inadequate password protections,** and 70% do not encrypt data during transmission.

Sources: Hewlett-Packard; MarketsandMarkets



## Strategic Insights

- Real-time analytics could evolve into an association service for members. With the association monitoring areas of interest to members, subscribers could receive early warning of issues and events. By performing real-time sentiment analysis on social media, associations could enhance their ability to spot emerging issues and respond to developing crises.
- Associations could apply fast data to their own operations—calibrating content offerings by monitoring member sentiment or adjusting meeting content based on messaging from registered meeting participants.
- Associations need to upgrade their own analytics systems to implement fast data practices. This will require hardware and software upgrades, but the more important upgrade may be to the analytical capability of association leaders and staff.
- The rise of fast data could create new expectations across the business community for speed and responsiveness. Associations may have to meet growing expectations for speed and responsiveness from an increasingly impatient membership.
- Fraud detection is a major fast data application. Associations could play a role in facilitating cross-industry anti-fraud initiatives.

### Timing

- **Stage:** Growth, though at an early stage
- **Speed:** Rapid and accelerating

### Potential Alternative Futures

- **The data firehose:** Rapid growth of the internet of things (IoT) quickly escalates the supply of real-time, actionable data.
- **Cyber-chaos:** Aggressive hackers and insecure IoT devices create an increasingly unstable data ecosystem.
- **Disposable data:** Taking action on real-time data grows increasingly valuable, yet the value of most of this data expires in a short period of time (e.g., traffic, weather, public sentiment).
- **Big data backlash:** Complaints about “algorithmic discrimination” and privacy impede the full application of data analytics.



## Take Action

- **Find and use the fast data you already have.** These are current examples of use cases:
  - Meeting registration data week-by-week and compared to historical trends.
  - Member response to new products and services.
  - Web analytics that identify a spike in a particular request, need, or failed transactions.
  - AB testing in marketing campaigns to find effective appeals.
  - Social media campaigns to promote awareness, raise money, or respond to an issue.
  - Personalized online learning tools to identify needs and direct members to resources.
  - Dynamic pricing to attract strategically important member segments.
- **Apply fast data to smarter planning and decision making.** The board's strategic plan and priorities help determine which data are important to collect to support strategy. In a sea of potential data, identify the data indicators that are good enough to test your strategies, then be prepared to alter course based on what you learn. Fast data can stop you from traveling too far down the wrong road, but it may not be appropriate for evaluating aspirational strategic goals.
- **Aggregate your industry's fast data for monitoring and feedback.** Associations need to know where and how their members are using fast data and explore potential services that aggregate this information to strengthen situational awareness and gain an authoritative voice for the industry. This may require building trust with members or partnering with others to gain access to their data.
- **Don't fall behind the fast data adoption curve.** Members expect associations to have a similar capacity to their own in using fast data. No association can afford to fall behind member expectations for speed and responsiveness.

## Keyword Search

To continue researching this change driver, use these search terms:

*fast data, business analytics, real-time data analysis, anticipatory intelligence, predictive analytics, business intelligence, machine learning, artificial intelligence, algorithmic learning, data mining, personal data, data trails*

### Who Will Be Affected

Data analytics is a game changer for how all organizations and businesses function. Fast data serve two important purposes: generating information to effectively run your business and identifying how to better serve your members, customers, and community.

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# Fraying Cybersecurity

**SUMMARY:** Risks to digital infrastructures are growing, even as dependence on them rises. Employees are both worried and harried—concerned about digital privacy and security in the workplace, and tired of the difficulty and complexity of maintaining system security. Associations face the same internal risks as other organizations but also have opportunities to support their members in new ways.

## Forecasts

- Risks to cybersecurity will continue to mount in both numbers and potential for harm, driven by the rise in cyberwarfare activities by governments, expansion of the internet of things (IoT), and the growing sophistication of a global criminal marketplace of data theft.
- The IoT will create billions of new vectors of attack, from traffic systems to toys to medical implants to door locks. The Economist Intelligence Unit has called the IoT “a quantum leap in cyber-risk.”
- Cybersecurity will increasingly be unmanageable by humans. An emerging genre of software will apply AI to automate cyber-defense, automatically detecting and self-healing systemic risks.
- Spearheaded by the EU, more governments are likely to pay increasing attention to public cybersecurity—potentially even treating it as a “public health” issue, with new regulations for consumer-facing companies and IoT products.

## Key Uncertainties

*The scale and scope of future digital disasters*

•

*Risks from the internet of things and how effectively they are addressed*

•

*Whether courts will extend existing liability protections for non-tech products (e.g., cars, large appliances) to the IoT*

•

*Whether autonomous cybersecurity systems will be as effective as hoped*

•

*Shifts in balance between cyber offense and defense*



## Supporting Trends

- **Cybersecurity.** Risks to digital infrastructures are growing, even as dependence on them rises.
- **Cybercrime-as-a-service.** A growing suite of tools, from exploit kits to ransomware, are available to help cybercriminals build threats and launch attacks.
- **Concern about online privacy.** Americans are very worried about the privacy of their personal data online.
- **Online-security fatigue.** Consumers are feeling “security fatigue” from the growing security concerns about their personal and professional information.
- **Internet of things.** The internet of things is spreading rapidly.
- **Wearable technologies.** Wearables will continue to grow and will expand into new domains like payment and health monitoring.
- **Millennials more proactive about online privacy.** Younger adults are more savvy and proactive about protecting their privacy.
- **Counter-surveillance apps.** As revelations about government intrusion into private communications create new concerns about electronic privacy, new mobile apps and other secure-communications software are gaining popularity.

### Related Drivers of Change

- Human-Machine Cooperation
- Personalized Artificial Intelligence
- Who Owns the Data?
- Dark Data Comes to Light

## Notable Data Points

### DATA BREACHES ESCALATING

Globally, more than  
**2.5 billion records were  
compromised in publicly  
disclosed data breaches**  
in 2017—an 88% increase over 2016.

Source: Gemalto

### THE COSTS OF CYBERCRIME

Cybercrime is projected to wreak  
**\$6 trillion in damages  
per year by 2021,  
up from \$3 trillion in 2015.**

Source: CSO Online

### INTERNET OF RISKS

A study found that  
**70% of common IoT  
devices do not encrypt**  
transmitted data.

Sources: Level 3 Communications & Flashpoint;  
Hewlett Packard; ABIresearch



## Strategic Insights

- Both for themselves and for members, associations will need to understand the shifting responsibilities of organizations:
  - How should companies protect their employees?
  - How can associations best protect sensitive member data?
  - Are organizations responsible when an employee is maliciously trolled or doxed, as in Gamergate, via their systems?
- Industries will need to respond to the growth of the internet of things. Associations can educate their members about risks and opportunities and the best tools for managing each.
- Cyberattacks can include corporate espionage. Larger associations may be subject to attacks and should educate their staff in threat identification.
- Cybersecurity insurance, a small but growing market, can protect against catastrophic financial and/or reputation loss from data breaches. Besides buying it themselves, some associations might find it useful to offer cybersecurity insurance as a member benefit, in partnership with an insurance firm.
- Humans are a weak link in organizations' cybersecurity regimes. Associations can serve as educators and advocates of employee-related best practices.
- Increased regulatory attention to cybersecurity could open a window for associations to help shape the regulatory environment to benefit members.

### Timing

- **Stage:** Growth, both in terms of risks and threats proliferating, and of new security solutions reaching market-readiness
- **Speed:** Rapid in terms of both threats and potential remedies

### Potential Alternative Futures

- **Radical transparency:** With massive amounts of data about everyone readily available, identity theft is obsolete because a system can tell if users are who they claim to be.
- **The internet as walled gardens:** No longer a vast, open playground, the internet is a maze of walled gardens secluded behind firewalls and paid memberships.
- **Don't touch my data:** Effective, secure online frameworks emerge to help ordinary people take control of their data and manage who can see it and use it.



## Take Action

- **Get cybersecurity out of IT and onto the board agenda.** Cybersecurity is a substantive and serious issue for all associations and businesses. Boards have a fiduciary responsibility to act to secure the association and a leadership responsibility to help members respond to this challenge. Do the risk analysis and invest in mitigation.
- **Have a business continuity plan.** Assume you will be hit directly or taken offline by cyberattack at some point. Plan how you will redirect business and communication systems to alternative platforms to avoid disruption.
- **Educate aggressively on the changing nature of industry threats.** Offer prompt and continuous updates via alerts, webinars, and technical reports to give members the tools to defend their organizations. Assemble and share best practices. Train staff how to be vigilant and work with IT on a strong line of defense.
- **Protect member data from intrusion.** Build safeguards around data to ensure privacy and protect members against identity theft.
- **Explore new services and partnerships that make strong security affordable.** Small businesses and local affiliates may not be able to afford higher levels of security expertise and systems. Consider how you might broker technical expertise and support as a new member service. Investigate the potential to create a “walled garden” where members can interact with additional measures of security not found elsewhere.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *risk, security, cybersecurity, hacking, cybercrime, cyberwarfare, cyberattack, cyberdefense, privacy, internet of things, IoT, surveillance, data breach, trolling, dox, doxing, data ownership, malware, spyware, bot net*

### Who Will Be Affected

All businesses and organizations are vulnerable to cybersecurity breaches. Mission-critical industries like healthcare, utilities, and transportation need solutions to contribute to national security. Retail and finance industries handle high volumes of sensitive data. Associations will need technology partners to respond.

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# Marketing and Advertising Transformation

**SUMMARY:** Advertisers and marketers are exploring innovative ways to connect with the public. Online advertising is growing, but concern is rising about vulnerabilities to abuse for other purposes, including fraud, as well as whether the model is even effective. Meanwhile, innovations in marketing and advertising are reshaping practices and assumptions by blurring the lines between marketing, entertainment, advertising, and content.

## Forecasts

- Advertising will shift from traditional formats toward greater reliance on embedded marketing and product placement as means to influence brand perceptions. Brands looking to attract younger audiences will become more dependent on social media “influencers” to reach mass audiences.
- Artificial intelligence interfaces like Alexa and Siri will be critical gatekeepers in a growing proportion of consumer transactions. AI platforms will be locations of experiments with new advertising approaches, such as paid search placement or discount microtargeting.
- Decentralized internet technologies such as blockchain will play an important role in supporting new advertising technologies. These technologies offer new ways to prevent fraud and protect privacy, and potentially they will provide a means for consumers to monetize their attention.

## Key Uncertainties

*U.S. adoption of EU-style data protection practices*

*Shifting consumer attitudes toward privacy protection*

*Effectiveness of traditional online advertising*

*Ability and willingness to curb “fake clicks” and fraudulent web traffic*

*Willingness of consumers to pay for online news and entertainment*

*Integration of advertising into new personal-assistance platforms*

*Extent of regulatory controls imposed on “big tech” companies*



## Supporting Trends

- **Growth of native advertising.** Native ads—ads in the form of the surrounding content—are growing quickly in both total spending and share of spending on digital media.
- **Algorithmic microtargeting.** Social media platforms can increasingly deliver customized and personalized marketing appeals.
- **Global social-media use.** The number of social media users is rising, with an estimated 480 million new accounts from January 2016 to January 2017—an increase of 21 percent.
- **Voice search.** Voice search is taking a growing share of search engine queries, creating new pressures for marketers to ensure that their products rank high in the relevant search results.
- **Regulators targeting big tech.** Regulators in the EU, Asia, and the United States are tightening regulation of the activities of the world's tech titans.
- **AI as customer.** Consumers are empowering smart assistants (e.g., Alexa and Siri) to make transactions, requiring companies to adapt to new “non-human” customers at the point-of-sale.
- **Audience fragmentation.** The idea of mass media is increasingly outmoded as audiences fracture.
- **I read it online.** Social media is a growing source of news for many Americans.

### Related Drivers of Change

- Blockchain Platforms
- Algorithmic Politics
- Nichification: Big Data Segmentation
- A Shifting Environment for Content

## Notable Data Points

### GLOBAL AD SPENDING

During 2017, nearly  
**50% of global advertising**  
spending went through  
**Google and Facebook.**  
Their dominance of online advertising  
enables them to collectively attract  
**83% of new global**  
**advertising spending.**

*Source: Sara Fischer, “Tech giants eating the advertising world,” Axios, June 27, 2018*

### ADOBE FINDS AD FRAUD

An Adobe study found that approximately  
**28% of web traffic was bots**  
or fraudulent click-farm activity.

*Source: Alexandra Bruell, “Fraudulent Web Traffic Continues to Plague Advertisers, Other Businesses,” The Wall Street Journal, March 28, 2018*

### AMAZON, THE AD UPSTART

Amazon's global ad sales could grow from  
**\$3 billion in 2017**  
to **\$20 billion by 2020.**

*Source: CNBC, April 3, 2018, <https://www.cnbc.com/2018/04/03/amazon-ad-business-could-be-20-billion-by-2020-analyst-says.html>.*



## Strategic Insights

- Associations have the potential to play an important role as trusted intermediaries between their members and providers of goods and services. Associations could put marketers in touch with key influencers among the membership or experiment with paid placement models in association information—though leaders would need to avoid compromising association information integrity.
- Smartphones are becoming a primary attention channel, and associations need to have a presence in that information stream. Leaders will need to consider the best value proposition for members among options such as quick access to news and information, socializing, professional networking, or continuing education.
- Associations can train their members to market using non-traditional media platforms like YouTube or podcasts. These platforms can be particularly effective outreach channels for engaging with younger audiences.
- Reputation and rating systems have been popularized by companies like Amazon, Yelp, and Angie's List. Associations could develop their own rating and feedback platforms for their membership. This could help diminish the power of external rating platforms, support the marketing efforts of individual association members, and strengthen the gatekeeping functions of the association.

### Timing

- **Stage:** Fast shifts in old and new structures
- **Speed:** Rapid

### Potential Alternative Futures

- **Internet public utilities:** Facebook and Google ad platforms are regulated as public utilities, allowing a variety of ad networks to compete on equal footing.
- **Rise of ad-utainment:** Advertising shifts to direct sponsorship and/or production of entertainment and e-celebrity content.
- **Pay-to-play advertising:** Technology enables advertisers to narrowly target demographic groups through intermediaries that protect personal privacy and distribute micropayments to consumers.
- **Gated media communities:** Quality content migrates to paid advertising-free platforms like Netflix and Amazon Prime.



## Take Action

- **Be clear what your marketing objectives are.** Before you approach this proliferation of digital channels, clarify your marketing strategy's desired outcomes. For-profits advertise to increase market share and profitability. Nonprofits can have more complex goals, such as achieving the mission, increasing member engagement, selling products and services, influencing public opinion, etc. Design your strategy and choose your channels and tactics to hit your goal.
- **Position your entire association as a strategic distribution channel for advertisers.** Start by recruiting advertisers that meet member needs and enhance your association's brand. Then treat them as valuable strategic partners supporting your association and members in multiple ways.
- **Explore the potential for pay-to-play content marketing.** You may be able to capitalize on the subject matter expertise of your vendors and advertisers to produce editorial content and support learning experiences. Minimally, strategic partners will see this as a way to enhance their return on investment. Optimally, some associations may unlock a new source of nondues revenue.
- **Use your data to make smarter marketing decisions.** Communication surveys provide some insight into how your members prefer to hear from your association. Behavioral data from social media and digital interactions also can help align marketing channels to member preferences. Associations will need to invest in the infrastructure to capture, analyze and interpret this data.
- **Take care not to cut people off from your message.** Your message needs to be where your members and customers are in these digital environments. While you will need to prioritize your channels, you don't want to make marketing choices that exclude some people or fail to take advantage of the potential audience that lies beyond your membership.

## Keyword Search

To continue researching this change driver, use combinations of these search terms:

*digital advertising, digital advertising networks, AdWords, cost per action, cost per click, A/B testing, influencer, behavior targeting, demographic targeting, interest segmentation, customer segmentation, digital segmentation, behavioral retargeting, retargeting*

### Who Will Be Affected

All associations market and many advertise. Advertising is a major source of nondues revenue for most associations. Many associations either have entrepreneurial members or members in areas that now must become more entrepreneurial, such as people working in the arts and many professions. These associations could educate and advise their members about effective marketing practices in today's digital and mobile environment.

### About ASAE ForesightWorks

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- guidance in performing environmental scans; and
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Ultimately, the program's mission is to empower association leaders to create a culture of foresight in their associations and to lead their organizations confidently into the future.

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# Nichification: Big-Data Segmentation

**SUMMARY:** The big data revolution makes it feasible to define new niche demographic segments that share common motivations and interests and to target them with tailored and tested appeals. Associations will be able to communicate to and even predict the interests of very specific segments but will run the risk of limiting broader audience awareness of content and messaging.

## Forecasts

- Nichification will enable real-time, contextualized targeting, including location-based marketing, need-based marketing, and marketing informed by past purchases.
- Nichification will be based on attitudes, values, and identity in addition to demographic and lifestyle segmentation.
- Big data will make it possible to continuously update the characteristics of a segment and forecast how its needs may evolve.
- Traditional marketing segmentation may ultimately give way to individualized customer communication based on predictive analytics. Big data nichification (“extreme segmentation”) is a step along this journey.
- Nichification could lead to algorithmic consumption and lifestyle guidance, resulting in greater separation between groups and gradual “algorithmic tribalization.”
- Nichification risks intensifying the isolation of groups of people into self-contained “bubbles” and perpetuating unintentional discrimination.

## Key Uncertainties

*Attitudes about privacy and control of personal data, exemplified by the recent backlash against corporate access to individual online history*

•  
*Extent of desire to escape targeting*

•  
*Resistance to being algorithmically shaped and guided*

•  
*Ability to effectively reach identified niches and deliver on identified needs*

•  
*Potential backlash against real or perceived discrimination*



## Supporting Trends

- **Predictive analytics.** Companies are adopting predictive analytics to turn their data into anticipatory knowledge.
- **Algorithmic microtargeting.** Social media platforms can increasingly deliver customized and personalized marketing appeals.
- **Big data changing marketing.** More effective use of big data will support a wide variety of new marketing capabilities.
- **Markets of one.** The “long tail” continues to stretch as customers increasingly expect highly tailored products, services, and experiences.
- **Marketing gets personal.** Big data and data analytics will enable new levels of personalization in marketing.
- **Anticipatory ambient intelligence.** Ambient intelligence may lead to systems anticipating consumers’ needs in every aspect of life.
- **From big data to fast data.** Increasingly, the value from big data is coming from the immediacy of the decision making.
- **Location-based services.** Technology that offers services on the basis of the user’s location and needs will continue to grow.
- **Blockbusters.** Despite the democratization of production and proliferation of offerings in the entertainment industry, the most popular offerings garner an increasing share of sales.

### Related Drivers of Change

- Personalized Artificial Intelligence
- Anticipatory Intelligence
- The Splintered Society
- Fast Data
- Algorithmic Politics

## Notable Data Points

### SOCIAL MEDIA USE

As of 2015,  
**65% of U.S. adults  
used social media,**  
up from just 7% in 2005.

Source: Pew Research Center

### A MOVE TO SOCIAL

Marketers are investing  
in social media to target niches  
and broadcast widely—  
**social ad spend is projected  
to hit \$41 billion in 2017,**  
compared to \$17.85 billion in 2014.

Source: Marketing Dive

### AD BLOCKING

eMarketer forecasts that  
**86.6 million Americans will  
use ad blocking software**  
at least once a month in 2017,  
up 24% from the previous year.

Source: eMarketer



## Strategic Insights

- Nichification enables organizations to move beyond targeting traditional demographics and to devise tailored and tested appeals to customers or members.
- Relevant applications of nichification include
  - identifying potential new members
  - identifying member segments with particular needs
  - finely targeting marketing
  - hiring to meet specific, specialized needs
  - engaging and mobilizing members who are passionate about particular causes or issues.
- Nichification strategies will require robust in-house or third-party data acquisition and analysis capabilities.
- Organizations will need to find the appropriate balance between respecting privacy expectations and using data to personalize interactions with members.
- Customizing communication to ever narrower member segments could make it more difficult to maintain a coherent brand and organizational identity.

### Timing

- **Stage:** Growth, extending a decades-old, ongoing segmentation process
- **Speed:** Rapidly spreading in for-profit marketing, though many programs are in their infancy

### Potential Alternative Futures

- **Isolation:** Relentless targeted marketing leaves individuals feeling trapped and isolated in their niches.
- **Suspicion:** Backlash against real and perceived algorithmic discrimination leads consumers to be suspicious of targeted marketing appeals or to reject them outright.
- **Crossing boundaries:** A counter-movement seeks to gain creative, communication, and empathy advantages by mixing people across niche borders.
- **Division:** Unintentional amplification of differences among people divides previously unified groups, e.g., advocacy groups and political parties.





## Take Action

- **Mine the data to discover opportunities for new growth.** You can look for emerging needs and member types you could serve. By studying their initial purchasing habits, you can understand how to extend your services to people who don't fit your typical member profile.
- **Target to improve service, save time, and cut costs.** The more members perceive you are the time-efficient way to fulfill their information, learning, and other needs, the more you increase the value of membership. Getting the right communications and marketing offers to interested people saves the association money and members time. You might cut down on promotion fatigue.
- **Take an inclusive and dynamic approach to defining niches.** Avoid putting people into categories based on assumptions that are hard to escape. Member and customer needs and interests change. People often have complex, fluid identities. Be careful not to build biases into your data models that presume more than you can tell from the data about who your members are. Keep searching for indicators that keep the member experience dynamic and evolving.
- **Preserve a sense of the whole.** If all members don't receive some messages in common or have a sense of the breadth of your products and services, they may come to have a more limited view of your association or find they are isolated in only one type of member community or experience. Strike the right balance between segmentation and integration. Filter on the factors that align best with your association's mission and search for ways to increase your mission effectiveness.

## Keyword Search

To continue researching this change driver, use these search terms:

*demographic segmentation, market segmentation, big data, big data analytics, customer analytics, A/B testing, microtargeting, predictive marketing, filter bubble, lifestyle segmentation, data mining, cluster analysis, personalization*

### Who Will Be Affected

Every association can do a better job of using data analysis and segmentation to understand its members' needs and interests. Likewise, businesses of all types can use data to increase the effectiveness of their marketing and communication efforts.

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# Personalized Artificial Intelligence

**SUMMARY:** Rapidly advancing machine learning is combining with data analysis to enable software equipped with increasingly accurate pictures of consumers' lives and likes. This technology can support personalized microtargeting and allow organizations to offload customer service work to chatbots and other interfaces. Individuals may interact more and more with software that seems to know and understand them, sometimes better than their friends.

## Forecasts

- Machine learning and data proliferation make the spread of personalized artificial intelligence, or AI, inevitable; only its ubiquity and capacities are in question.
- AI will offer increasingly personalized decision support in a range of activities. People will look to AI for advice on purchases, solutions, and even questions of social life. Some will grow dependent on their artificial support systems.
- Personalized AI tools will interact not only with their “owners” but also with each other and with other humans—e.g., to set up appointments.
- AI systems may be oversold or misused and become associated with ineffectiveness. This perception could persist even after the technology has further matured. The notorious inaccuracy of voice recognition systems offers a lesson.

## Key Uncertainties

*Speed of development of AI technologies and methods*

•  
*Speed of change in computing power, especially as advances in raw computing power slow down*

•  
*Acceptance of AI and how people react as they simulate intelligence more closely*

•  
*Effects of privacy concerns and norms*

•  
*Data regulation around privacy*

•  
*Interoperability and the compatibility of systems*

•  
*Data access and control and whether it is siloed or open*



## Supporting Trends

- **Machine learning innovation.** Innovations in machine learning are accelerating the development of artificial intelligence.
- **Accessible AI for business.** Google and Microsoft are offering simplified interfaces to enable non-experts to develop their own customized machine-learning applications.
- **Affective computing.** Affective computing integrates emotion detection and simulated psychological sensitivity into computers.
- **AI as customer.** Consumers are empowering smart assistants (e.g., Alexa and Siri) to make transactions, requiring companies to adapt to new “non-human” customers at the point of sale.
- **Human-machine hybrid work.** Semi-autonomous systems that work in partnership with humans may be more prevalent than fully autonomous systems.
- **Anticipatory ambient intelligence.** Ambient intelligence may lead to artificial intelligence systems that anticipate consumers’ needs in every aspect of life.
- **Internet of things.** The internet of things (IoT) is spreading rapidly.
- **Voice interfaces.** Voice interfaces are proliferating on phones, in the home, and in vehicles.
- **Wearable technologies.** Wearables will continue to grow and will expand into new domains like payment and health monitoring.

### Related Drivers of Change

- Automating Work
- Human-Machine Cooperation
- Anticipatory Intelligence
- Blockchain Platforms

## Notable Data Points

### RISE OF THE MACHINES

By 2021, the number of **devices with built-in AI assistants will exceed Earth’s population.**

Source: Ovum

### PERSONALIZED ASSISTANCE

**The Amazon Alexa AI assistant reached 30,000 “skills” (apps) in 2018,** with the number growing rapidly.

Source: VentureBeat

### INTERNET OF THINGS

The installed base of IoT devices is projected to **grow from 21 billion in 2018 to over 50 billion in 2020.**

Source: Juniper Research



## Strategic Insights

- AI systems have the potential to vastly improve customer and member experiences—staying aware of users' past interactions and preferences and offering proactive recommendations. However, theory is likely to be ahead of reality for at least several years.
- Organizations will have to keep pace with AI capabilities that enable new and better member services—leaders will need to avoid implementing these capabilities in ways that frustrate customers, members, and staff.
- AI systems will increasingly be able to serve as vehicles for highly personalized interfaces for members, customizing their interactions with organizations.
- AI will offer the means to provide personalized training and education, personalized content offerings, and personalized information services.
- People will expect to be able to use the same AI systems they use in their daily lives at work, and non-work systems and interfaces will set expectations for work versions. Employees will want to BYOAI (bring your own AI) to work.
- If companies use AI-enabled systems chiefly to reduce costs without adequate attention to effectiveness, these systems could come to be seen as a cheap approach that is dismissive of customers' needs.

### Timing

- **Stage:** Emergence—new capabilities are appearing quickly and just beginning to be applied
- **Speed:** Rapid, as the field is developing quickly

### Potential Alternative Futures

- **Idiot robots:** AI is oversold, disappointing adopters and those interacting with AI systems, resulting in persistent skepticism of the technology.
- **Walled bots:** Proprietary and incompatible data systems fragment the information that AIs depend on, limiting effectiveness.
- **I love my algorithm:** Many people prefer interacting with AI for many purposes, for reasons including privacy from other humans.
- **The bot behind the curtain:** In many applications, AI systems are hidden from view and indistinguishable from a human actor.





## Take Action

- **Personalize the member experience.** Using AI, associations can identify patterns of behavior and preferences that help customize the member experience. AI can recommend products and services your members might overlook and deepen their level of engagement. In the near future, AI is likely to work like a personal shopper and search agent. Experiment with enabling members to tailor complex conference experiences. Longer-term, personal assistants could become a primary member interface, managing transactions where human presence is not required. However, this could make association services more essential as they are integrated seamlessly into members' lives.
- **Avoid the creepiness factor.** Some members may find close observation of their online behaviors more intrusive than helpful. Some member data could be too sensitive to analyze, such as career services, self-assessments, and credentialing information. Associations will need data privacy policies consistent with their culture and member expectations.
- **Work with your industry's pioneers in AI.** These are early days for this technology, yet leading AI providers are already targeting key industries and discovering innovative ways to help companies and professionals work smarter. Seek out these pioneers to lead the way into this future. Other associations exploring the leading edge of AI also may be a resource. Associations will be fast followers, but they can't get too far behind in educating their members and using these capabilities.
- **Plan ahead for the future of your technologies.** Now is the time to ask what it will take to make your technology systems AI ready, and whether your current vendors are factoring these capabilities into their research and development plans.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *personalized, personalization, AI, artificial intelligence, recommendation engines, machine learning, expert systems, ambient intelligence, recommender system, collaborative filtering, microtargeting*

### Who Will Be Affected

Many industries are already experimenting with AI's potential: hotels and the hospitality industry; conference and event companies; business, accounting, and professional services; healthcare providers and researchers; retail; media and communications; etc. Wherever the crush of transactions or the complexity of data analysis exceeds human capacity to manage, artificial intelligence increasingly will be the best solution.

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# Taming Big Tech Dependency

**SUMMARY:** A handful of global consumer-technology platforms—Facebook, Google, Apple, Amazon, and their subsidiaries—increasingly shape entertainment, news, commerce, and even personal interaction. The unprecedented (and still growing) power and influence of these companies create a variety of challenges for both governments and civil society, prompting governments to step up their oversight.

## Forecasts

- All stakeholders, including the big tech companies, their advertisers, and their users, face a period of tumult as governments shift their approaches to big tech.
- New approaches to regulating big tech will arise outside the United States. The EU's 2018 law, the General Data Protection Regulation (GDPR), could serve as a global model of stringency. Any U.S. regulation will be influenced by the GDPR but will tend toward piecemeal guidelines rather than rules.
- China's tech champions (especially Alibaba, Tencent, and Baidu) will be a growing force in this area, creating both new competitive issues and new voices in the global regulatory debate.
- Tech platforms will self-regulate to avoid legal clampdowns. This could generate useful innovations, such as the application of AI to weed out offensive content or ensure adherence to rules.
- Beyond 2020, decentralized internet-style networks could gain usership alongside—or in place of—today's internet.

## Key Uncertainties

*Whether the recurrent crises afflicting the big tech platforms (data misuse, electoral influence, fake news, etc.) will trigger significant oversight*

•

*Influence of the EU's stringent privacy laws on other governments' treatment of big tech*

•

*How Chinese multinationals choose to engage with regulators in the rest of the world*

•

*Effects of tech companies' own attempts at self-regulation*

•

*Millennials' attitudes as they move into positions of authority*

•

*The possibility of a "digital 9/11" event that changes people's views of cybersecurity*



## Supporting Trends

- **Big tech firms increasingly challenged as anti-competitive.** A backlash is growing against the market dominance of the major tech firms.
- **Technology outrunning the law.** Technological advances are rapidly moving beyond current legal and regulatory structures.
- **Data-trail control.** People are generating vast data trails of personal information, leading to growing questions about who should own and control that data.
- **The rise of fake news.** Fake news—unsubstantiated rumors or outright falsehoods presented as fact—is a growing phenomenon.
- **Algorithmic manipulation effects.** Research shows that subtle changes to the ranking of search engine results can have significant impacts on people's political decisions.
- **Decentralized internet.** Numerous projects are under way to develop a “decentralized internet” using blockchain and other approaches, allowing users to control their own data and user experience.
- **EU tech regulation.** The EU is experimenting with sweeping regulations intended to curb the social and economic influence of tech companies, including Facebook, Google, and Apple.
- **China's champions woo global retailers.** Massive Chinese conglomerates—especially Alibaba and Tencent—are recruiting international companies to their retail platforms. Thousands are accepting this opportunity to sell to Chinese consumers.

### Related Drivers of Change

- Declining Trust
- Algorithmic Politics
- Ethical Edge of Innovation
- Who Owns the Data?
- Socializing Reshaped
- Cartel Capitalism

## Notable Data Points

### CAMBRIDGE ANALYTICA COSTS

If the FTC fined Facebook the maximum allowable amount for the estimated **87 mil. users whose data were allegedly appropriated by Cambridge Analytica**, Facebook would owe nearly \$3.5 tril. in fines.

*Source: Financial Times*

### ELECTION MANIPULATION

In theory, Google could single-handedly—and invisibly—**change the outcome of 25% of all elections.**

*Source: American Institute for Behavioral Research and Technology*

### CONSUMERS FEAR AI

**43% of U.S. respondents fear AI-powered services** “will come to know too much about them and their family.”

*Source: Accenture Strategy Global Consumer Pulse Research*





## Strategic Insights

- As tech platforms come under greater scrutiny in the United States and elsewhere, the trust enjoyed by various platforms will fluctuate more than in the past, and new platforms will continue to arise. Associations need to develop backup communications strategies—including for their advertising—in case formerly trusted platforms (e.g., Facebook) suddenly lose value.
- The ongoing stream of crises associated with big tech (election meddling, misappropriation of user data, fake news, etc.) indicate that technology systems have, in many cases, outrun ethical norms. Associations may find it more important than ever to demonstrate the ethics of their own data policies, e.g., restating their organization's code of data ethics following a high-profile breach of trust by a tech company.
- The value of being a trusted source could heighten even further as association members and other stakeholders seek refuge from the fakery and manipulation of public platforms.
- Momentum toward giving users control of their own data could steamroll—especially as the EU's GDPR data-protection law takes hold—compelling organizations of all sizes to rethink their data ownership and management practices.

### Timing

- **Stage:** Rapid growth as big tech's legal and/or ethical issues continue to mount, creating more public and government skepticism
- **Speed:** Variable across geographies: regulation may arrive fastest in the EU, unevenly in Asia, and slowly in the United States

### Potential Alternative Futures

- **Titans brought low:** Facebook and Google are regulated as utilities, cutting their revenues and reducing their dominance and influence.
- **Europe's epic fail:** Europe's highly prescriptive GDPR, with its heavy regulatory burden, proves impossible to enforce, overwhelming European regulators and leaving tech companies largely free to do whatever their users will tolerate.
- **A decentralized internet:** New, decentralized internet-style platforms emerge, quickly attracting users with their promise of user-owned data and an absence of surveillance, filter bubbles, or fake news.



## Take Action

- **Conduct a risk analysis of current systems and platforms.** Know what your vulnerabilities are and have Plan B solutions ready to maintain business continuity. Boards should treat digital strategy as a critical fiduciary responsibility yet stay open to initiatives that will drive innovation. This issue is dynamic, and associations need to prepare for all alternative futures.
- **Move to decentralized systems tapping repositories of data.** In the past, centralized systems offered the best chance at integrated data and systems. But with the advent of APIs (application programming interfaces) and advanced single sign-on capabilities, it may be better to take a decentralized approach, using the best solutions that meet your needs. The reporting and analysis needs—primary drivers of data integration—are better served through the implementation of data warehouses and visualizations systems such as PowerBi and Tableau.
- **Adopt and make visible your ethical data policies.** As the public loses trust in major tech platforms, members will also scrutinize how their associations operate. Communicate your practices in highly visible ways.
- **Prepare for increased marketing and communications costs.** Associations have benefitted from low cost, large scale social media platforms for marketing and communications. If those capabilities are compromised, they may have to turn to costly alternatives. Big tech platforms might adopt premium service models that could drive up operating costs.
- **Weigh in on proposed self-regulation solutions.** Big tech companies likely will attempt to forestall laws and regulations through self-regulation. Associations need to monitor these maneuvers and use their consumer power to protect their interests in terms of services or practices.

## Keyword Search

To continue researching this change driver, use combinations of these search terms:

*big tech, regulation, user data, data privacy, General Data Protection Regulation, GDPR, China, EU, antitrust, anti-competitive, trust, Google, Facebook, Amazon, Apple, Alibaba*

### Who Will Be Affected

Associations, especially small and medium-sized associations, are notably dependent on their technology vendors to help them navigate these challenges. Global associations will face greater exposure than local and regional associations, particularly as different regulatory responses emerge. Leaders will also have to look out for members who have built their marketing and communications into these environments.

### About ASAE ForesightWorks

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- regularly updated action briefs;
- tools for applying insights from the research in your association;
- guidance in performing environmental scans; and
- opportunities to engage with peers around the research.

Ultimately, the program's mission is to empower association leaders to create a culture of foresight in their associations and to lead their organizations confidently into the future.

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# Who Owns The Data?

**SUMMARY:** In the United States, there is a growing movement among technologists and consumers to give individuals more control over data about themselves (their identifying information, online communications, purchasing histories, social media habits, etc.). This idea may prove a challenge to existing industry models, as free consumer data is the lifeblood of many popular online services and programs, particularly mobile applications.

## Forecasts

- The battle for control of personal data could involve consumers less and less. As government regulations on use of consumer data are relaxed, it will be corporations challenging other corporations for access to consumer databases, with users having little say.
- Current methods for enabling consumers to control their data are incomplete and cumbersome. As this idea grows, new ways of data sharing and control could arise. These may include differential controls, allowing the release of some data (consumer preferences) but restriction of other data.
- User concerns about data privacy could drive behavior changes and product innovations, including interest in products in which user data capture is ephemeral. Users may also begin to purposely create public-facing consumer personas that are similar to, but not exactly like, their actual selves.
- The issue of who owns consumer data could escalate as connected devices spread (the internet of things) and collect more consumer data, often surreptitiously.



## Key Uncertainties

*Convenience of data ownership systems*

•  
*The role of regulation*

•  
*Discontinuous data disasters*

•  
*Evolving privacy concerns*

•  
*Availability of non-data models of funding consumer access*

•  
*Tech industry views of security*



## Supporting Trends

- **Who controls data trails?** People are generating vast data trails of personal information, leading to growing questions about who should own and control that data.
- **Wearable technologies.** Wearables will continue to grow and will expand into new domains like payment and health monitoring.
- **Predictive analytics.** Companies are adopting predictive analytics to turn their data into anticipatory knowledge.
- **From big data to fast data.** Increasingly, the value from big data is coming from just-in-time use. “Fast data” emphasizes real-time decision making based on the idea that the greatest value from data comes when the analytics can be used immediately.
- **Cybersecurity.** Digital infrastructures face risks from increasingly sophisticated criminal hackers, non-state actors, and growing international cyber-warfare capabilities. Rapid expansion of the internet of things (IoT) is exacerbating the problem, bringing online millions of new, weakly secured devices.
- **Mobile phone data for social research.** Researchers are using datasets of mobile phone usage to study a wide range of human behaviors.
- **Concern about online privacy.** Americans are worried about the privacy of their personal data online.

### Related Drivers of Change

- Fast Data
- Personalized Artificial Intelligence
- Dark Data Comes to Light
- Anticipatory Intelligence

## Notable Data Points

### CYBERSECURITY

80% of common IoT devices  
**have inadequate  
password protections,**  
and 70% do not encrypt data  
during transmission.

Source: Hewlett-Packard

### WEARABLE TECH

By 2021, it is estimated that  
**29% of Americans  
will own and use**  
a wearable device.

Source: Forrester, Tractica

### INTERNET OF THINGS

Growth for the IoT is forecast to be rapid:  
IHS forecasts that the IoT market  
**will grow from  
15.4 billion devices in 2015  
to 75.4 billion in 2025.**

Source: IHS Markit



## Strategic Insights

- Associations and organizations will need to be aware of changing responsibilities for holding member data as these issues evolve. Having a clear—and clearly communicated—policy on data collection, release, and use could allay members' concerns about their data privacy.
- An increasing threat to data privacy and security is data “leakage” from poorly designed or secured apps and software used for organizing or connecting with members. Even if organizations are not directly responsible for these leaky apps, they may still be on the hook for leaks they generate.
- Similarly, association leadership should be aware of members' collective views on data privacy and use. What is allowed by law or regulation may differ from members' own desires.
- Associations have a lot of potentially lucrative consumer data and should consider ways to monetize it. The trick will be to do so judiciously within the strictures discussed above.
- International data-protection standards are diverging, making this a growing issue for international associations. Consumer privacy in Europe, for example, is highly valued and protected. This leads to potential issues on both the organizational level and the individual member level.

### Timing

- **Stage:** Emergent, though its importance is growing as consumer awareness spreads
- **Speed:** Spreading at moderate speed, though occasionally accelerated by public interest events—e.g. data breaches

### Potential Alternative Futures

- **Consumer rebellion:** Tired of their data being used without compensation and concerned about privacy, consumers rise up, using ad hoc methods and boycotts to halt the flow of data while also demanding tighter government regulations on data use and monetization.
- **Bad data:** Data become less reliable or valuable for companies due to purposeful spoiling, spoofing, or masking by users.
- **Breach exhaustion:** Faced with what seems like a never-ending series of consumer-data privacy breaches, data ownership and privacy are no longer an issue for consumers, who see attempts at data security as pointless.





## Take Action

- **Establish standards and best practices around data ownership.** Associations are in a privileged position to negotiate with multiple stakeholders and government to bring order and standard practice where few safeguards exist now. They also can clarify any member preferences and openness to sharing data for mutual benefit. Organizations may soon have to demonstrate they offer appropriate safeguards.
- **Equip members to educate customers and clients about their data rights.** Few people understand the value and risks associated with their personal data. Associations can help professionals and businesses explain the benefits and trade-offs of disclosure.
- **Protect sensitive industry data from misuse.** Most industries have some sensitive consumer or business data that law enforcement, regulatory agencies, and research organizations want to access. Associations can advocate for protective laws and regulations and educate members about their rights and responsibilities in handling this information.
- **Track how other countries resolve data ownership issues.** The European Union and some other countries have more restrictive policies related to consumer data than the United States. Trade associations representing data-rich industries need to stay on top of these regulations; others can monitor these developments to anticipate how these issues might be resolved.
- **Protect your data assets.** Every association knows something others want to know. Member and research data are valuable assets others want to use. Associations should have clear policies and smart business practices that define and restrict use to appropriate purposes. Some member data such as ethnicity and sexual orientation could be sensitive. While you could keep vast amounts of transaction data, you may choose not to retain some data beyond its immediate purpose to protect your members and staff.

## Keyword Search

To continue researching this change driver, use these search terms: ***privacy, personal data, data mining, big data, security, data trails, data exhaust, privacy breach, cybersecurity security, wearables, online privacy, public data infrastructure, application programming interface, API*** MEETING TERMS: ***event, meeting, conference***

### Who Will Be Affected

Associations in data-rich industries, especially those handling extensive consumer data, are at the forefront of data ownership issues. Many associations already aggressively police copyright and intellectual property ownership issues in their conference presentations, journals and publications, and social media. The source and ownership of data will become part of that monitoring.

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# Demographics and Membership Action Set

Changes in social and demographic trends will be reflected in, and have an impact on, associations' members and staff. These changes will be the result of the increased presence of both immigrants and younger generations in the workforce and the aging and retirement of baby boomers and some older gen X workers. At the same time, women will continue to move into higher-level management, and technology will further broaden how people are able to participate in work and society. Some of these trends are already being felt: There were twice as many people older than 65 in the workforce in 2016 than in 2000.<sup>1</sup> And in 2015, Millennials became the largest generation in the U.S. workforce.<sup>2</sup> Societal makeup and expectations in the future will differ from today, as ideas about what it means to work, how people are included in society, and what organizations are expected to provide employees and members are being transformed as broader notions of inclusion are embraced and older generations retire.

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<sup>1</sup> Drew Desilver, "More Older Americans Are Working, And Working More, Than They Used To," Pew Research, June 2016, <http://www.pewresearch.org/fact-tank/2016/06/20/more-older-americans-are-working-and-working-more-than-they-used-to/>.

<sup>2</sup> Richard Fry, "Millennials Surpass Gen Xers As The Largest Generation In U.S. Labor Force," Pew Research, May 2015, <http://www.pewresearch.org/fact-tank/2015/05/11/millennials-surpass-gen-xers-as-the-largest-generation-in-u-s-labor-force/>.



These changing demographics and social behaviors present an opportunity for associations to be more effective and proactive in all areas of their operations. To assist with this vital task, the ASAE Foundation collaborated with a research team from Signature i and Foresight Alliance to create the ASAE ForesightWorks Demographics and Membership Action Set. The action set includes seven action briefs that introduce the drivers of change that will shape the future direction of the demography and membership of associations. Each action brief explores forecasts, implications, and potential responses for organizations as they move forward.

## Putting the Drivers of Change Into Context

The accompanying graphic connects each of the drivers of change to key questions related to the future of your organization or industry. The action briefs are designed to stimulate your thinking about implications, actions, and possible outcomes, as well as to inform and inspire new directions for your strategic planning, risk management, innovation, and environmental scanning efforts.

**KEY:**

- Moving fast
- Medium speed or emergent
- More time to plan and prepare

Source: ASAE ForesightWorks





## The Elements of an Action Brief

Each action brief consists of four pages. These pages have been designed to work together or to be used independently for different purposes and audiences.

Page one can serve as a standalone page that summarizes the driver of change and its importance, or as an introduction to the other pages. This page provides a summary paragraph, forecasts—"probable futures" given the current trends and data—and key uncertainties—the "known unknowns" that need to be watched and considered when making downstream forecasts.

Page two is the supporting data page. This page elucidates some of the key trends that informed the forecasts, points to related ASAE ForesightWorks action briefs to help readers develop a comprehensive view, and provides a couple of supporting data points. The page provides evidential support for the forecasts described on page one.

Page three is the strategic insights page. Here you'll find material to help you discuss the driver of change in a strategy session. The page includes broad insights, the projected timing and speed of the change, and some potential alternative futures—possible (though not probable) futures that should be considered from a risk management perspective.

Page four suggests potential actions. This page offers specific steps for addressing the change, identifies the types of organizations expected to be affected, and keywords to support continued research in this action brief area.

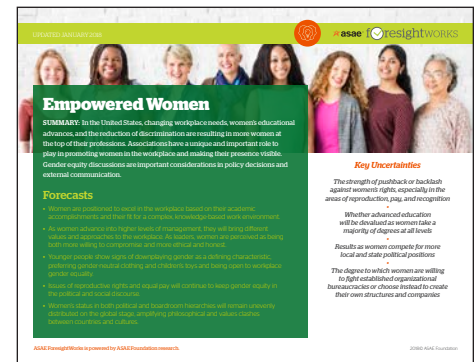
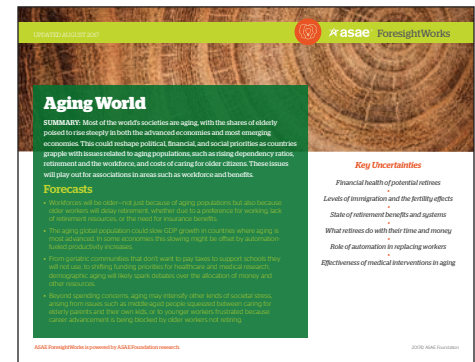
More in-depth guidance for thinking through and working with the action briefs, either on your own or with a group, can be found in the ASAE ForesightWorks User's Guide.

## Strategic Discussion Questions

Initial strategic questions are suggested here as a means of creating dialogue and discussion around the action brief set. You may want to choose a subset of the questions or create new questions to have a more targeted conversation with your group.

### Future implications

- What might our industry look like in 15 years? What kinds of workers will we need to be able to address possible changes to our industry?
- The retirement of one generation will see the loss of a tremendous amount of institutional knowledge. Do we have the critical practices and policies to capture this knowledge before it walks out the door?





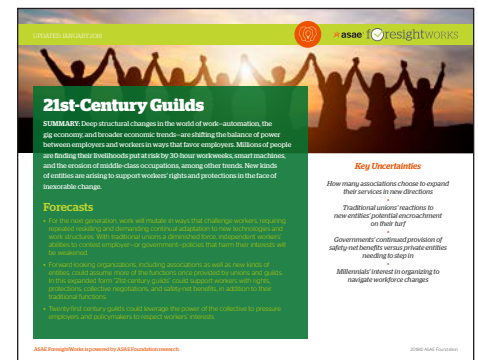


## Opportunities and challenges

- How can a younger, digital native, and more diverse workforce be leveraged for the organization and/or the industry?
- What challenges do you see on the horizon as workforce demographics shift? What will the association need to do to mitigate and resolve these challenges?
- Do we have policies and programs in place to support and professionally develop the coming workforce?

## Building awareness

- What do we know about how our industry is changing? Where can we look to find that information?
- What policies do we need to better manage a diverse workforce that may not work onsite or meet face-to-face on a regular basis?
- What will we need to do to make our industry attractive to the talent we want?



## Additional Reading

These articles provide more insight into the drivers of change. They can be shared ahead of a discussion to familiarize the group with the concepts and possibilities captured by the action briefs.

- The Economist on the economic and demographic impacts of aging workforces. <https://www.economist.com/news/finance-and-economics/21702477-can-debt-fuelled-model-growth-cope-ageing-populations-vanishing>
- Pew Research on American and global demographic trends. <http://www.pewresearch.org/fact-tank/2016/03/31/10-demographic-trends-that-are-shaping-the-u-s-and-the-world/>
- Brookings on the economic and demographic impact of immigration. <https://www.brookings.edu/blog/the-avenue/2017/08/03/u-s-immigration-levels-continue-to-fuel-most-community-demographic-gains/>
- The New Yorker on guilds as a future model for work. <https://www.newyorker.com/business/currency/the-new-guided-age>
- Pew Research on current and projected patterns of women in the American workforce. <http://www.pewresearch.org/fact-tank/2017/01/31/women-may-never-make-up-half-of-the-u-s-workforce/>



The authors have worked diligently to ensure that all information in this work is accurate as of the time of publication and consistent with standards of good practice in the general management community. As research and practice advance, however, standards may change. For this reason it is recommended that readers evaluate the applicability of any recommendations in light of particular situations and changing standards.

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# Aging World

**SUMMARY:** Most of the world's societies are aging, with the shares of elderly poised to rise steeply in both the advanced economies and most emerging economies. This could reshape political, financial, and social priorities as countries grapple with issues related to aging populations, such as rising dependency ratios, retirement and the workforce, and costs of caring for older citizens. These issues will play out for associations in areas such as workforce and benefits.

## Forecasts

- Workforces will be older—not just because of aging populations but also because older workers will delay retirement, whether due to a preference for working, lack of retirement resources, or the need for insurance benefits.
- The aging global population could slow GDP growth in countries where aging is most advanced. In some economies this slowing might be offset by automation-fueled productivity increases.
- From geriatric communities that don't want to pay taxes to support schools they will not use, to shifting funding priorities for healthcare and medical research, demographic aging will likely spark debates over the allocation of money and other resources.
- Beyond spending concerns, aging may intensify other kinds of societal stress, arising from issues such as middle-aged people squeezed between caring for elderly parents and their own kids, or to younger workers frustrated because career advancement is being blocked by older workers not retiring.

## Key Uncertainties

*Financial health of potential retirees*

•

*Levels of immigration and the fertility effects*

•

*State of retirement benefits and systems*

•

*What retirees do with their time and money*

•

*Role of automation in replacing workers*

•

*Effectiveness of medical interventions in aging*





## Supporting Trends

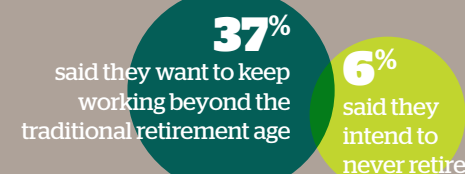
- **Graying world.** All regions of the world will see significant aging in the next few decades.
- **Graying in Europe and Japan.** Europe and Japan have the oldest societies in the world, with some countries already having a share of seniors that the United States will not equal until 2050.
- **Graying America.** The number of Americans 65 and older is growing and expected to double by 2050.
- **Boomers and retirement.** Many Boomers want to keep working indefinitely, but many others will leave the workforce sooner than planned.
- **U.S. retirement savings crisis.** Americans are not saving enough for retirement. Drivers of this shortfall include longer life expectancies, lower investment returns, higher expectations for retirement lifestyle, and increases in the Social Security retirement age.
- **Declining U.S. workforce participation.** America's workforce participation rate continues to fall.
- **Business leadership deficits.** Companies report a significant gap in leadership skills, with many concerned that they will not meet future leadership needs and that there is serious deficit in their human resources pipeline.

### Related Drivers of Change

- Immigration-Driven Demography
- The Stagnation Economy
- Automating Work

## Notable Data Points

### BOOMERS



Source: The Employee Benefit Research Institute's "2016 Retirement Confidence Survey"

### RETIREMENT SHORTFALL



Source: The National Institute on Retirement Security

### GREY AMERICANS



Source: United Nations, Population Division of the Department of Economic and Social Affairs, World Population Prospects: The 2012 Revision

### GREY WORLD

**Globally, the share of elderly citizens is poised to double** between 2010 and 2050—from 8 percent to 16 percent. In Latin America the share will rise from 7 percent to 19 percent, while China will see a jump from 8 percent to 24 percent. Africa will double as well, but only to 6 percent of the population.

Source: The United Nations Population Division World Population Prospects: The 2012 Revision



## Strategic Insights

- The effects of aging on the workforce and on association membership—mass retirements, loss of expertise, older workers working longer, age-bifurcated members and workers—will be the biggest human resources and member engagement challenge of the next 20 years.
- As older employees retire, there will be a need to create and deploy new systems for capturing the decades of institutional knowledge and skills held by retiring co-workers.
- Some forecasts show seniors staying on and working later in life. This will require organizations to rethink how to best use and serve these older workers—for example, with flexible or part-time scheduling, redesigned processes and practices, etc.
- As older employees work longer, there may be tension with younger employees who may feel blocked or stifled in their careers waiting for people to retire. Organizations will need to be aware of this and design new programs for managing organizational change.
- As older workers leave an organization, an opportunity will emerge to redesign systems and structures to better reflect both new best practices and the strengths and interests of younger, rising staffers. With the scale of looming retirements, there could be an occasion for once-in-a generation, wholesale realignment of organizations' focus, priorities, and practices.
- For associations, one benefit from an expanding pool of retired members is a larger group of potential volunteers, as retirees seek ways to be engaged and productive after leaving the workforce.

### Timing

- **Stage:** Growth, varying among different societies
- **Speed:** Medium, as it is a demographic process

### Potential Alternative Futures

- **New citizens = younger country:** In the medium term, countries offset the effects of aging by encouraging immigration and the rise in fertility rates that often accompanies it.
- **Old labor is cheap labor:** A glut of older workers, working part-time shifts, keeps the workforce gray and forces younger workers into more precarious work and financial situations.
- **A civic golden age:** Retiring Boomers, healthier and more active than past generations, spend their early retirement years engaged with their communities, volunteering at schools, cultural institutions, and social service organizations.



## Take Action

- **Assess the age demographics of your current membership.** Recruiting the next generation might be an urgent strategic priority to sustain membership. Be careful not to ignore the needs and priorities of older, long-term members. Analyze aging members' interest in maintaining credentials and continuing to engage in education and volunteering. Some associations have had success offering an emeritus membership option. Planned giving may be a viable fundraising strategy.
- **Develop programs and benefits to meet the needs of your later-career members.** Offer programs and resources to help mid- and late-career members maintain skills or transition to retirement. Help your members manage hiring bias and advocating for flexible work options and safe working conditions. Tap into this growing pool of volunteers with more available time. Offer mentoring programs to engage older members with younger members in mutually beneficial ways.
- **Address the societal challenges of an aging world.** Some industries and professions will be on the front line addressing an aging world. Your association might advocate for age-appropriate design, public policies and regulations, and funding. You might offer education and training to take advantage of growing business and service opportunities.
- **Identify and address specific risks associated with an aging membership.** Event planners will need to support the accessibility and comfort level of aging members. Associations that depend on experienced content leaders and faculty may need to replace this braintrust as people retire. If your association's culture and processes tend to favor institutional memory and long-time members, you may face a difficult struggle with these generational transitions.

## Keyword Search

To continue researching this change driver, use these search terms:

*aging workforce, demographics, graying economy, retirement, Baby Boomers, global aging, workforce demography, senior workers*

### Who Will Be Affected

All organizations are affected by an aging world. Consultant member categories might grow as older members opt for more flexible employment. Credentialing organizations will need to monitor interest in maintaining credentials.

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# Empowered Women

**SUMMARY:** In many countries, changing workplace needs, women's educational advances, and the reduction of discrimination are resulting in more women at the top of their professions. Associations have a unique and important role to play in promoting women in the workplace and making their presence visible. Gender equity discussions are important considerations in policy decisions and external communication.

## Forecasts

- Women are positioned to excel in the workplace based on their academic accomplishments and their fit for a complex, knowledge-based work environment.
- As women advance into higher levels of management, they will bring different values and approaches to the workplace. As leaders, women are perceived as being both more willing to compromise and more ethical and honest.
- Younger people in wealthy countries show signs that they will downplay gender as a defining characteristic, preferring gender-neutral clothing and being open to workplace gender equality.
- Issues of reproductive rights, equal pay, and workplace harassment will continue to keep gender equity in the political and social discourse.
- Women's status in both political and boardroom hierarchies will remain unevenly distributed on the global stage, amplifying philosophical and values clashes between countries and cultures.

## Key Uncertainties

*The strength of pushback or backlash against women's rights, especially in the areas of reproduction, pay, and recognition*

•  
*Whether advanced education will be devalued as women take a majority of degrees at all levels*

•  
*Results as women compete for more political positions*

•  
*The degree to which women are willing to fight within established organizational bureaucracies or choose instead to create their own structures and companies*



## Supporting Trends

- **Educational rise of women.** Across all races, women now attend college in significantly larger numbers than their male counterparts and earn the majority of degrees from U.S. universities.
- **Blurring of strict gender roles.** Among those under age 34, gender rules and conventional gender stereotypes are fading.
- **Backlash against women's advances.** Researchers have found that women's rights are increasingly under threat. Global threats include gender-based violence, lack of reproductive rights, and exclusion of women from discussions about women's futures.
- **Persistent gender stereotypes.** According to a longitudinal study performed by psychologists in the United States, attitudes toward gender and gender stereotypes have changed little since the 1980s.
- **Algorithmic sexism.** Besides threatening more women's jobs than men's, automation risks infusing sexist biases throughout society's digital systems.
- **Women's professional standing.** Women are advancing in professional and management positions.
- **Global gender gap closing.** The World Economic Forum's annual Gender Gap Index found widespread progress in closing gender gaps since 2006, as measured by differences between men and women in health, education, economy, and politics—although there was regression in 2017.

### Related Drivers of Change

- Higher Education 3.0
- Diversity and Inclusion
- The Splintered Society

## Notable Data Points

### EDUCATIONAL ATTAINMENT

As of 2018, women are estimated to make up  
**58% of people in  
American graduate  
education programs.**

*Source: National Center for Education Statistics*

### WOMEN AT THE TOP

Among 1,500 top U.S. companies,  
**women made up  
only 5.1% of CEOs**  
and 11.5% of top executives  
as of 2016-2017.

*Source: Pew Research Center*

### NOT IN STEM

According to a 2017 report,  
**women are still  
underrepresented  
in STEM occupations,**  
with women's share of computer workers  
actually declining since 1990.

*Source: U.S. Department of Labor*





## Strategic Insights

- Associations' organizational structure and staff are often excellent examples of promoting women in the workplace and using their leadership skills to advantage. Being aware of best practices and sharing these with the industries associations represent can provide members with practical how-to's.
- Associations may want to consider developing both formal and informal women's networks that enable women to share concerns and successes as well as assist each other. Conferences and chapter meetings are excellent opportunities to foster these networks.
- Associations are in a unique position to make women's achievements visible— independent of their area of endeavor—through communication channels and conferences.
- Gender equity discussions are very much in the news and are present both explicitly and implicitly in many policy areas that affect associations and the workforces they represent. Boards should have a clear and stated position on gender considerations, which they can reference in making decisions.
- Training departments could offer modules on how men and women can make work environments more woman-friendly.
- Associations might consider how women's perspectives are handled both in internal decision-making processes and in advising the groups they represent. Beyond enabling women to succeed in the workplace, this approach promotes the value that women's perspectives can bring and may enable a wider range of solutions to problems and issues.

### Timing

- **Stage:** Growth, but subject to fluctuation
- **Speed:** Moderate, with periods of stagnation and even regression

### Potential Alternative Futures

- **Back toward the '50s:** The backlash is somewhat successful in shifting women's rights backward, dampening the percentage of women in the workplace as well as curtailing upward movement.
- **Women advance women:** Following men's playbook, women focus on advancing other women, creating networks and organizations that facilitate women's interests.
- **Who cares about academic degrees?** As women come to dominate academically, some groups and organizations downgrade the importance of academic credentials and instead rely on reputation and references.





## Take Action

- **Clarify your gender equity challenges.** Different fields have been historically male- or female-dominated, but gender patterns are changing as more women pursue higher education and more men are attracted to employment opportunities in service occupations. Even in fields where women are increasing their numbers, they often are underrepresented in senior positions. Know your demographic trends and identify your particular barriers to entry and advancement.
- **Promote women into association leadership.** Women may be well represented in committees and task forces yet underrepresented on boards. Women gravitate to association careers yet small and medium-sized associations are far more likely than major associations to choose women CEOs to lead them. Mentors and sponsors can help prepare and champion women into more prominent leadership roles.
- **Set inclusive job expectations.** Women often have to prioritize family over volunteer or staff responsibilities. Associations can gain their talents by becoming more flexible about travel demands, meeting timing, and tolerance for family emergencies.
- **Combat sexual harassment in conferences and workplaces.** Women continue to encounter hostile environments and inappropriate behaviors. Affirm your commitment to a safe and welcoming environment through stated policies and clear procedures for correcting infractions.
- **Recognize and reward women's contributions.** Do your traditional ways of valuing, nominating, and selecting candidates for prestigious awards, leadership positions, and high-profile speaking opportunities disadvantage women? Open up your processes and criteria to counter the perception that an old boy's network calls the shots.
- **Adopt an inclusive approach to gender identity.** Gender identification is becoming more fluid with each generation. More associations will experience members who are transitioning their gender, calling for greater sensitivity to how unexamined association practices as simple as member applications and profiles may become inappropriate.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *women, workplace, workforce, women's pay, gender equity, gender discrimination, backlash, reproductive rights, working mothers, gender stereotypes, gender trends, gender educational statistics*

### Who Will Be Affected

The majority of employees in many associations are women. Some associations have a great track record of promoting women into volunteer and staff leadership positions; others have serious catching up to do. The glass ceiling cracked early for trade associations dominated by family businesses as daughters took over and continued their family's leadership in association affairs.

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# Immigration-Driven Demography

**SUMMARY:** Immigration has become the central driver of American population growth—and will reshape not only demographics but also values and attitudes in the decades ahead. For associations, this will result in a more diverse membership with new ideas, expectations, and needs.

## Forecasts

- Immigration could bring cultural and political shifts as new citizens add their cultural diversity to American society. This could lead to new cultural influencers as immigrants move into U.S. media.
- The fluctuating intensity of immigration could affect all levels of the workforce, from unskilled labor (farms, factories) to highly skilled medical and technology workers.
- Polarization around immigration and resulting diversity issues will continue, though this will likely shift over time as younger generations with a more accepting view of immigration become more influential.
- The nature of the immigration debate could shift as people grasp that immigrants to the United States are increasingly from Asia.



## Key Uncertainties

*Immigration policy on numbers of immigrants and how they qualify for admission*

•

*Organic levels of immigration, as the demography of countries of origin changes*

•

*Immigrant fertility changes*

•

*How fast millennial influence drives changing attitudes about immigration*

•

*Immigrants' values and how they are expressed*



## Supporting Trends

- **Population growth driver.** In the next 50 years, immigration could add more than 100 million new Americans.
- **Asians now the largest share of new U.S. immigrants.** China and India have replaced Latin American countries as the largest sources of arriving U.S. immigrants.
- **Diverse millennials.** Diversity may be the millennial generation's core characteristic: In 2015, the millennial generation was 56 percent white and nearly 30 percent "new minorities" (Hispanic, Asian, and those identifying as multiracial). African-Americans were 11.5 percent of this generation in 2015, slightly less than their share of the American population as a whole (12.5 percent).
- **Coming soon: America's non-white majority.** Pew Research Center projects that the United States will be majority non-white by 2043. At the same time, the proportion of the minority population that is African-American will shrink steadily.
- **Immigration: millennial numbers-booster.** The millennial generation contains more immigrants than any other living U.S. generation. Most of the current working-age immigrants who arrived in the United States between 2000 and 2015 are millennials.

### Related Drivers of Change

- Declining Trust
- The Stagnation Economy
- Diversity and Inclusion
- Empowered Women
- American Inequality

## Notable Data Points

### IMMIGRATION AND POPULATION GROWTH

From 1965 to 2015,  
**immigration accounted  
for more than 55%**  
of U.S. population growth.

Source: Pew Research Center

### NON-WHITE MAJORITY

The U.S. population will be  
**47% white, 28% Hispanic,  
13% black, 8% Asian,  
and 4% other by 2050.**

Source: Pew Research Center

### MILLENNIALS AND IMMIGRATION

According to a White House report,  
**15% of Americans aged 20-34  
in 2014 were foreign-born.**

### ASIAN IMMIGRANTS

The overall **Asian-American  
population surged by 46%**  
from 2002 to 2014, reaching 19 million.

Source: Nielsen



## Strategic Insights

- Immigration will bring greater diversity to association membership, requiring leadership to adjust for cultural differences. Immigrants and even first-generation offspring of immigrants will often come to associations with different life experiences from those of the non-immigrant membership.
- Even though it is a hot-button issue, many associations will need to engage in the debate around immigration and will need to have a coherent policy. A deeper awareness of how immigration intersects with the interests and activities of members will be important.
- A change in federal policy could have serious repercussions and create disruptions across both skilled and unskilled workforces. In some cases, uncertain—not just more restrictive—immigration policies could result in sought-after workers going to other, more welcoming countries.
- Associations have direct roles vis-à-vis immigration and immigrants. For example, associations could help immigrant professionals (including students) integrate professionally. This would also give associations access to new sources of members.
- For many associations, new immigrant members could provide new connections to emerging markets of interest.

### Timing

- **Stage:** Growing scale and impact
- **Speed:** Medium speed, though policy change could move faster than demographic effects

### Potential Alternative Futures

- **Demography is *not* destiny:** Unsettled issues around legal status and economic stress result in lower rates of immigrant fertility.
- **Less diverse, and thus older:** A drop in immigration results in a demographic acceleration of the aging of the American population as there are fewer young arrivals and fewer children of immigrants to offset the older population.
- **“Deserving” immigrants:** New U.S. regulations and lists of desired requirements result in immigration policy becoming more “merit-based,” skewed to those with needed skills or abilities.



## Take Action

- **Examine your own demographic shifts and resulting needs.** Some professions and trade groups are experiencing a strong influx of immigrant participation. They may have different cultural needs and priorities and expect a different value proposition to even become members. Immigrants from countries without a strong association culture may not understand and appreciate what can be gained from joining.
- **Think local first, then global.** Who the immigrants are will vary at the community level. Chapters and local affiliates may have specific immediate priorities not shared nationally or globally. Urban organizations may experience more immigration than rural or suburban groups. Their frontline experience and relationships with local partners could help others learn faster how to serve specific populations.
- **Increase your cultural competency.** Aware of these demographic shifts, many associations now offer their members education and training in cultural competency. This is especially important for frontline workers in health and life skills fields, and valuable knowledge for anyone involved in designing and managing access to programs, including association executives responsible for membership and education.
- **Get outside a U.S.-centric perspective.** Associations aspiring to a global presence should be aware that migration is a global phenomenon offering real opportunities. Members who migrate are bridge builders connecting networks in their country of origin with their receiving country. U.S.-based members may appreciate assistance as they relocate and assimilate into new cultures. Members can cultivate a common language of terms and concepts that define their field and overcome other language barriers. Non-U.S. members may find greater prestige in their affiliation than their U.S. counterparts.

## Keyword Search

To continue researching this change driver, use these search terms:

*immigrants, immigration, birth rate, fertility, demography, diversity, population growth, migration, refugees, chain migration, family reunification, Hispanic, Asian American*

### Who Will Be Affected

Demography sets the baseline context for all organizations and businesses. With immigration projected to drive population growth for the next few decades in the United States, people will have to look to these newcomers as potential customers, clients, and members.

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# The Next-Gen Professionals

**SUMMARY:** Millennials are now the largest generational cohort in the workforce, and generation Z is right behind them. These next-gen professionals are the future of associations and, contrary to some conventional wisdom, they are willing to both join and stay with organizations that meet their career development needs. Organizations will need to provide the kinds of training, mentoring, content, and other services that next-gen professionals value most, encouraging engagement that leads to loyalty.

## Forecasts

- Millennials will join organizations in larger numbers as three trends unfold: their share of the U.S. workforce continues to increase, their financial status improves, and more organizations reshape their offerings around what many millennials value most. These highly-valued offerings include mentoring and training; personalization; state-of-the-art tech platforms; curated content; real job leads; plenty of networking with other millennials and with leaders in their field; and, often, a sense of meaning.
- Next-gen professionals will motivate more organizations to step up their training and education—and in formats younger generations prefer: just-in-time microlearning, multiscreen events, co-mentoring, and smaller, more focused face-to-face meetings.
- Many next-gen professionals will continue to push for merit-based leadership positions, seeking to bypass the traditional promotion ladder.
- Next-gen professionals could form their own organizations if they are unable to get what they want from baby boomer- and gen X-led organizations.

## Key Uncertainties

*How the youngest millennials will differ from their generation's elders*

•  
*Whether certain key characteristics (slowness in purchasing cars and homes, starting families late, etc.) are lifecycle-based or are lifelong traits of this generational cohort*

•  
*Whether a more robust labor market and rising wages will continue—and whether this will change next-gen professionals' consumer and lifestyle behaviors*





## Supporting Trends

- **Next-gens as joiners.** Next-gen professionals will join professional organizations, but need the right incentives.
- **Millennials not job-hoppers.** Close to half of U.S. millennials who have leadership positions in their companies say they want to stay in their jobs long term.
- **Training millennials.** Millennials tend to value training above other benefits.
- **Virtual volunteering.** More volunteering is happening online.
- **The ethical economy.** Younger Americans overwhelmingly say that their decision making is driven by their personal values.
- **Changing performance evaluation.** The annual performance review is disappearing, as millennials and gen Zs want more timely feedback and communication from their employers.
- **Millennials largest share of U.S. workforce.** Millennials are now the largest generation in the U.S. labor force—and gen Z is poised to pass them in size.
- **Boomers and millennials—fighting over jobs?** Analysis suggests that millennials' career prospects will not likely be harmed by baby boomers delaying retirement.

### Related Drivers of Change

- Socializing Reshaped
- Microlearning
- Virtualized Meetings
- Mentoring 2.0
- Transparent Organizational Ethics

## Notable Data Points

### JOINING IN DROVES

**58% of under-40s said they belong to a professional organization or community**  
while 77% of the rest said they intend to join one soon.

*Source: Buzz Marketing Group, Professional Organizations Study 2015*

### LONG-TERM LEADERS

In a 2017 poll, about  
**44% of millennials**  
with leadership positions said they could  
**see themselves working for their companies for more than 15 years.**

*Source: The Conference Board, Divergent Views/Common Ground: The Leadership Perspectives of C-Suite Executives and Millennial Leaders*

### TRAINING IS #1

According to Deloitte,  
**training and development is millennials' top preferred benefit,**  
with 22% of those surveyed ranking it as such.

*Source: Deloitte*



## Strategic Insights

- Be wary of half-truths about millennials, which all too often are circulated by marketing firms based on sketchy research or outdated assumptions. Consider convening a focus group, formal or informal, of millennial members—and former members, if available—to inquire deeply into exactly what they want from the association. Be ready to dive deeper with specific questions, e.g., which training or event formats they would prefer.
- Mentoring can be a valuable service that associations provide to next-gen professionals, along with bespoke training and education, smaller and more focused meetings, and tangible career opportunities.
- Many millennials have delayed important life milestones, such as home buying and family formation, due to economic concerns. What are the effects of these delays on their career trajectories? How does this shape what they need from associations?
- What values does the association stand for, and do they align with values next-gen professionals might hold as important? Are the association's values sufficiently prominent in its online profile and messaging?
- In line with the national trend toward political polarization, some millennials might begin politicizing their organizational participation. The potential exists for millennials to drive values-based divisions within their professional groups.
- Associations can study successful groups, such as YEC and FounderSociety—two invitation-only membership communities for entrepreneurs under 40 that have young staffs, a concierge approach, vibrant social-media spaces, and tightly curated content.

### Timing

- **Stage:** Growth, with the impacts expanding and deepening as more next-gen professionals move into the workforce and as they mature in their aspirations
- **Speed:** Medium to rapid, driven by organizations' quest to attract and retain next-gen professionals

### Potential Alternative Futures

- **Sticking with my clan:** Many millennials and gen Zs abandon existing associations and convene with other next-gen professionals to form their own associations, tailored to their preferences.
- **Financial fetters:** Most next-gen professionals never fully break free of the constraints of student debt, slow career starts, expensive healthcare, and a fitful economy, with many adjusting their aspirations downward.



## Take Action

- **Ask younger members what they need.** Don't let presumed generational differences drive your strategies and programming decisions. Ask next-gen professionals what they need. You might discover millennials and gen Zs share many of the same priorities and preferences that other member cohorts have.
- **Provide career guidance.** Millennials are building their careers in uncertain times with fewer traditional job opportunities, and there may be more uncertainty ahead for generation Z. Illustrate and promote diverse career paths. Provide opportunities to experience other businesses and organizations through internships, fellowships, and job exchanges. Establish corporate executive tracking for high potentials. Offer mentors to provide wisdom and reassurance in critical life decisions.
- **Restructure volunteer opportunities and accelerate the path to top leadership positions.** With their commitment to work-life balance, millennials want to serve in more flexible and ad hoc volunteer assignments. They are often proficient with collaboration technologies. Fast-track rising stars with the skills and leadership potential your association needs. Don't let protracted pathways to top leadership dampen their enthusiasm and loyalty.
- **Refresh your education and training with new approaches and technologies.** Next-gen professionals are interested in dynamic, hands-on experiences as well as microlearning and online learning channels that align with their need to balance work and life. Market your association's ability to meet their interest in education and training.
- **Promote diversity and inclusion.** Millennials and generation Z are the most diverse generational cohorts in the United States to date. They are quick to notice when organizations don't share their acceptance of diversity or their desire to see everyone respected and included.
- **Update your networking events.** Offer social and networking experiences that appeal to multiple generations and enable attendees to connect across generational lines.

## Keyword Search

To continue researching this change driver, use these search terms:

*generations, generation X, millennial preferences, baby boomers, mentoring, co-mentoring, microlearning, professional organizations, FounderSociety, YEC, generation Z*

### Who Will Be Affected

All organizations are affected, as millennials are now the largest cohort in the U.S. workforce. Professions and businesses facing workforce shortages due to increasing demand for services or extensive boomer retirements place a high priority on attracting and retaining millennials in their workforce and the association.

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# Socializing Reshaped

**SUMMARY:** Social media, telecommuting, digital entertainment, and shifting social norms are reshaping patterns of socializing, both online and in person. A growing percentage of social interaction is now digitally mediated. Work life and social life are increasingly occurring in the context of online social tribes and communities. The need to change one's physical location to socialize and work with others is declining.

## Forecasts

- The line between work and personal life will continue to blur as technological mediation allows activities associated with either sphere to be accomplished from anywhere.
- With most work and social activities partially mediated by online tools, the providers of these tools will have tremendous amounts of user data and information, giving them influence over what users see and do and how they perceive the world.
- As digital interactions reshape social behaviors, these new patterns will be adopted by workers—increasingly changing how work is done and how offices are managed. The “I’ll text if I’m coming” ethos could play havoc with scheduling freelancers, while sick days could be supplanted by “ghosting.” Managers will need to be ready for this new flavor of blurred work and social lives.
- As new ideas about socializing and social networks take hold and work and leisure forums blur, co-workers could be seen as just another social cohort. This could lead to headaches for HR as workers begin to forget or ignore the fact that there are special behavioral rules governing office interactions.

## Key Uncertainties

*Effects of privacy concerns*

•

*Rising backlash against working from home or remotely*

•

*Level of integration of physical and online social lives*

•

*People's need or desire for physical company*

•

*Role of automation in reshaping work life*

•

*Degree of resistance to expanding role of algorithms in all facets of life*



## Supporting Trends

- **Algorithmic socializing.** Algorithms are increasingly mediating social interactions. Facebook and Twitter use programs that create social feeds designed to keep the user interested, but these are not fully reflective of information shared by the user's friends.
- **Connecting online and real-life lives.** People are taking their online friendships offline into the real world via apps.
- **Working from home.** Despite recent retrenchment by several large companies, the number of Americans telecommuting and working from home continues to rise.
- **Living single in America.** Single households, once largely the province of divorcés, widows and widowers, or bachelors, are now a primary part of the American social fabric.
- **Virtual volunteering.** More volunteering is happening online. Younger volunteers are engaging through social media or extending advocacy or fundraising campaigns to their social networks.
- **U.S. social media use growing.** Americans' social media use continues to grow.
- **Staying in, not going out.** Home theaters, better food-delivery options, and easier food ordering may all be contributing to Americans staying in. Online streaming service Netflix has over 56 million subscribers in the United States, and Amazon Prime has over 100 million subscribers globally.

### Related Drivers of Change

- Personalized Artificial Intelligence
- The Next-Gen Professionals
- Nichification
- Work Redefined

## Notable Data Points

### YOUTHFUL SOCIAL MEDIA

Social media continues to be a young person's game:

**88% of 18-24-year olds use social media**

versus 78% of 30-49-year olds, 64% of 50-64-year olds, and only 37% of those 65+.

Source: Pew Research Center

### LIVING SINGLE

The number of people living in single-person households in the U.S. in 2017 was

**35 million, up from about 7 million in 1960.**

Source: Statista

### TELEWORK

As of 2017,

**43% of U.S. workers work remotely at least "occasionally,"**

a number that has risen from 9% in 2007.

Source: Flexjobs



## Strategic Insights

- Expectations for interaction with organizations will continue to be reshaped by evolving social life. The move to greater online interaction will require some internal functions to be fundamentally rethought. There may be significant generational differences in expectations, habits, and preferences for how members interact with organizations and with each other.
- As more members and employees work offsite, new systems will be needed for maintaining trust, as relationships will not be face-to-face but mediated through various online services.
- The ease of getting things done online means that face-to-face meetings are a big deal. They need to be compelling enough to inspire people to travel. This means conferences and meetings need to provide even more value to avoid the dreaded “Just send me the link to the livestream and the PDF.”
- Online work and life could lead to new ways for identifying or appointing leadership. New leadership could rise organically via members’ networks, based less on votes than on followers. The kinds of leadership positions that align well with these new methods, versus those that require a more traditional approach, will have to be studied.
- Interfacing online may provide new leadership opportunities for employees and members who might feel blocked from leadership in real-life milieus, whether due to introversion, language barriers, or physical abilities. An online world could unlock unused potential of employees or members.

### Timing

- **Stage:** Growth, although under way since the mid-1990s
- **Speed:** Relatively rapid, and accelerating

### Potential Alternative Futures

- **A small measure of privacy:** As life is increasingly lived online, a backlash develops as some people seek to regain control of privacy. This has social repercussions.
- **People are scary:** The oblique and screen-based communication styles of contemporary social life strongly reshape work and commerce away from face-to-face interactions.
- **The F2F movement:** People tired of staring at screens all day insist on more face-to-face interaction with friends and co-workers.





## Take Action

- **Set an objective and strategies for social media.** Despite widespread adoption, these are still early days. Align social media with your core mission and strategies to maintain control of your brand, content, and community. Why and in what ways do people need to socialize around products and services?
- **Engage members anytime, anywhere.** Many associations now recognize that how engaged members are matters more than how many there are. Social media give people with less time and ability to travel a powerful way to feel connected to their association and each other. Associations can monitor what matters to members as they converse and collaborate online.
- **Foster peer-to-peer learning.** Online communities make it easy for members to share knowledge and answers in real time. Adult learners like learning while working with others doing similar work. Associations can crowdsource conversations and projects around emerging issues. Mentoring programs flourish when people can connect regardless of location. Associations can copyright and trademark intellectual property in ways that protect their value yet facilitate member sharing.
- **Train staff and leaders to use social media wisely.** Social media blur the boundaries between what's public and personal, bringing instant visibility to what people say and do. People acquire large networks to advance their interests or vent their concerns. Before things turn ugly, establish rules on who can speak for the association and guidelines for appropriate communication and behavior. Social media afford volunteers and staff a great deal of autonomy to demonstrate leadership and advance the association when used wisely.

## Keyword Search

To continue researching this change driver, use combinations of these search terms:

*online socializing, online communities, social media, social life, social networks, event retail, online work, remote work, working from home, third spaces, declining marriage rates, delayed marriage, millennials and social life, digital socialization*

### Who Will Be Affected

Social media and online interaction are communication technologies affecting all organizations and businesses. They are becoming powerful tools in effective association operations. Different platforms and tools will emerge and become popular while others decline. As more people work, learn, and play using these social technologies, they will reshape cultural norms and societal values.

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# 21st-Century Guilds

**SUMMARY:** Deep structural changes in the world of work—automation, the gig economy, and broader economic trends—are shifting the balance of power between employers and workers in ways that favor employers. Millions of people are finding their livelihoods put at risk by 30-hour workweeks, smart machines, and the erosion of middle-class occupations, among other trends. New kinds of entities are arising to support workers' rights and protections in the face of inexorable change.

## Forecasts

- For the next generation, work will mutate in ways that challenge workers, requiring repeated reskilling and demanding continual adaptation to new technologies and work structures. With traditional unions a diminished force, independent workers' abilities to contest employer—or government—policies that harm their interests will be weakened.
- Forward-looking organizations, including associations as well as new kinds of entities, could assume more of the functions once provided by unions and guilds. In this expanded form "21st-century guilds" could support workers with rights, protections, collective negotiations, and safety-net benefits, in addition to their traditional functions.
- Twenty-first century guilds could leverage the power of the collective to pressure employers and policymakers to respect workers' interests.

## Key Uncertainties

*How many associations choose to expand their services in new directions*

•

*Traditional unions' reactions to new entities' potential encroachment on their turf*

•

*Governments' continued provision of safety-net benefits versus private entities needing to step in*

•

*Millennials' interest in organizing to navigate workforce changes*



## Supporting Trends

- **Declining American unions.** Membership in American unions has declined to include just 11 percent of all wage and salary workers. Some economists consider the decline of unions to be one of the reasons for stagnant middle-class incomes.
- **Health insurance uncertainty.** The U.S. healthcare system faces years of change and uncertainty.
- **The new apprenticeships.** U.S. government support for apprenticeships is significantly expanding, with a planned doubling of federal funding for apprenticeship programs and a goal of 4.5 million apprenticeships by 2022—almost 10 times the total in 2016. The new apprenticeships are meant to benefit U.S. employers as well as workers at all skill levels via paid, certified career-training opportunities at registered organizations.
- **Growth of global gig economy.** The global “gig economy,” in which workers either freelance, work under short-term contracts, or work as independent contractors, is projected to grow—and may have already been responsible for almost all new jobs in the United States between 2005 and 2015.
- **Growing freelance workforce.** More than one third of the U.S. workforce (36 percent) was freelancing in 2016, up from 34 percent in 2014, according to a national survey by Upwork and Freelancers Union.
- **Growth of the blended workforce.** “Blended” workforces—in which freelance workers team up with conventional employees on projects—are spreading. This on-demand option solves key problems, cuts costs, and offers flexibility for the company and the workforce.

### Related Drivers of Change

- New Forms of Work
- Work Redefined
- Higher Education 3.0
- Automating Work
- Bifurcated Workforce

## Notable Data Points

### GIG GROWTH

**94%** of jobs created in the U.S.

between 2005 and 2015 were

**“alternative work”**

—including 60% that were directly tied to the rise in freelancers, independent, and contractors.

Source: Dan Kopf, “Almost all the US jobs created since 2005 are temporary,” Quartz, December 5, 2016, <https://qz.com/851066/almost-all-the-10-million-jobs-created-since-2005-are-temporary>.

### “THE NEW NORMAL”

In 2016, **six million Americans** who wanted full-time jobs were **still working part-time**, typically without benefits and at lower wages than their full-time equivalents—the highest number in about 30 years (excluding the Great Recession).

Source: U.S. Department of Labor

### INVESTING IN APPRENTICESHIPS

In 2015, the U.S. Department of Labor **awarded \$175 million in grants** to expand apprenticeship programs.

Source: U.S. Department of Labor



## Strategic Insights

- Associations could consider how they are currently guild-like, and whether their value proposition could be elevated by becoming more so. An updated guild model, including protections, collective negotiations, and safety-net benefits, could provide workers with important supports in the face of a demanding new work landscape—offering negotiating clout and protections while preserving the freedom of both workers and employers to make arrangements suited to their unique situations.
- Other associations could build on the experience of organizations that already provide union-style services (such as the National Education Association, which offers a broad array of insurance, loans, and retirement benefits). These might include newer entities, like Freelancers Union, which provides gig workers with nontraditional benefits like support for client non-payment.
- Gig, freelance, and contract workers could be the constituency most in need of guild-like services. Advocacy on behalf of independent workers is a growing need, for example. In the longer run, more associations might tilt their membership profile toward individuals.

### Timing

- **Stage:** Emerging, with multiple trends converging to push toward this future
- **Speed:** Medium, depending on how today's organizations respond to the need for new models

### Potential Alternative Futures

- **Big Brother steps in:** Regulators and legislators move to prevent new organizational entities that challenge existing power dynamics.
- **Embracing gig workers:** Governments create policies to support freelancers and gig workers, reducing the structural need for guilds.
- **Back to school, forever:** Schools—from vocational education to universities—take on the advocacy and quality-assurance roles of guilds.
- **Offshore guilds:** Taking advantage of the growing trade in services, many guild-style functions are offshored.



## Take Action

- **Resolve where your association's responsibility and loyalty lie as tensions arise between workers and employers.** In many individual membership associations, employers have considerable clout and often pay the member dues. Hybrid membership organizations have both employing organizations and individuals dependent on these organizations for employment.
- **Revisit the viability of affinity programs offering employee benefits.** Interest in benefit-based affinity programs have been declining in many associations. If employers are not offering critical benefits or if more people are self-employed and working independently, associations may be able to fill this gap in safety net benefits.
- **Use credentialing programs to vet competency.** Promote your credentialing programs as an efficient way to screen for competency. Insist that qualified individuals be rewarded consistent with these demonstrated skills and experience.
- **Give your local and regional affiliate structures a guild focus.** Independent workers who cannot rely on employing organizations for training and networking could become the core constituency for local services. Identify where these individuals may be clustered, such as around employment centers for industries or congregating in co-working facilities.
- **Advocate for safe and just workplaces.** Know what the workplace issues are in your industry and strive to get on the right side of them. In a world where groups of stakeholders can easily organize to correct perceived injustices, your best defense is to act in socially responsible ways. This also may mitigate the likelihood that some members will feel the need to migrate to other organizations they believe better represent their self-interests.

## Keyword Search

To continue researching this change driver, use these search terms:

***work, gig, gig economy, freelance, temporary work, contract work, contingent work, part-time work, precariat, guilds, unions, apprenticeships, blended workforce, benefits***

### Who Will Be Affected

Professional membership societies could feel intense pressure to act like guilds in representing their members. Associations that have a growing number of consultants and independent professionals may find they can offer guild-like programs and services. Hybrid membership organizations with both corporate and individual members could feel more employer-employee tension.

### About ASAE ForesightWorks

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- tools for applying insights from the research in your association;
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# Economic Conditions Action Set

Uncertainty about the direction and health of the global economy is growing, creating a challenging environment for association strategic planning. Through 2017, economic recovery since the 2008 recession has remained sluggish, exacerbating economic inequality. Increasingly, productivity growth in many industries is being concentrated among a handful of industry leaders, with many firms coping with slower growth rates. Emerging economies are taking a growing share of global GDP, with new players like China and India becoming more influential in global trade and finance. The financial gains from economic growth are concentrated among high earners, causing the middle class to gradually decline. Concerns about globalization have led to political shocks like Brexit and the 2016 U.S. election, creating further uncertainty about the ability of global financial status quo to be maintained in the face of a populist backlash.





Concerns related to economic conditions presents an opportunity for associations to be more efficient and prudent in all areas of their operations. To assist with this vital task, the ASAE Foundation collaborated with a research team from Signature i and Foresight Alliance to create the ASAE ForesightWorks Economic Conditions Action Set. The action set includes six action briefs that introduce the drivers of change that will shape the future evolution of the economy. Each action brief explores forecasts, implications, and potential responses for organizations as they move forward.

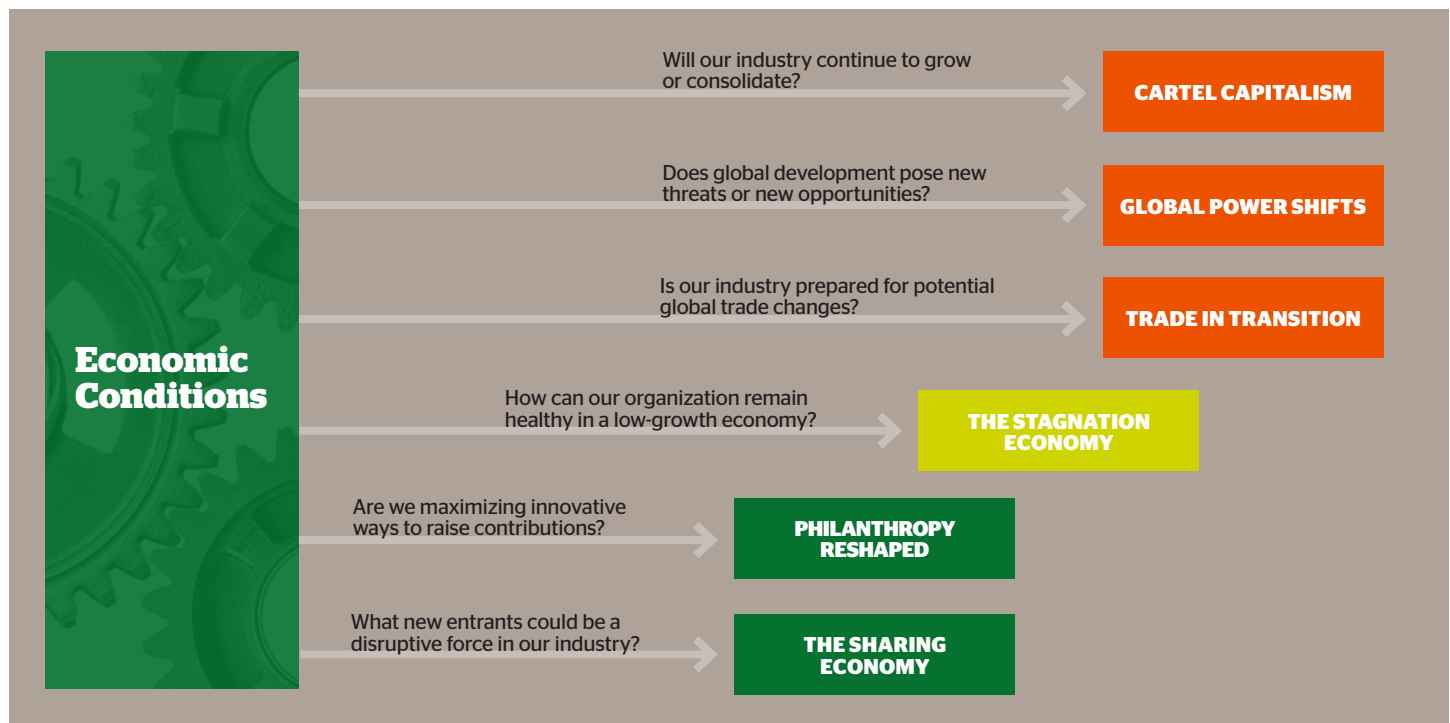
## Putting the Drivers of Change Into Context

The accompanying graphic connects each of the drivers of change to key questions related to the future of your organization or industry. The action briefs are designed to stimulate your thinking about implications, actions, and possible outcomes, as well as to inform and inspire new directions for your strategic planning, risk management, innovation, and environmental scanning efforts.

### KEY:

- Moving fast
- Medium speed or emergent
- More time to plan and prepare

Source: ASAE ForesightWorks





## The Elements of an Action Brief

Each action brief consists of four pages. These pages have been designed to work together or to be used independently for different purposes and audiences.

Page one can serve as a standalone page that summarizes the driver of change and its importance, or as an introduction to the other pages. This page provides a summary paragraph, forecasts—“probable futures” given the current trends and data—and key uncertainties—the “known unknowns” that need to be watched and considered when making downstream forecasts.

Page two is the supporting data page. This page elucidates some of the key trends that informed the forecasts, points to related ASAE ForesightWorks action briefs to help readers develop a comprehensive view, and provides a couple of supporting data points. The page provides evidential support for the forecasts described on page one.

Page three is the strategic insights page. Here you'll find material to help you discuss the driver of change in a strategy session. The page includes broad insights, the projected timing and speed of the change, and some potential alternative futures—possible (though not probable) futures that should be considered from a risk management perspective.

Page four suggests potential actions. This page offers specific steps for addressing the change, identifies the types of organizations expected to be affected, and keywords to support continued research in this action brief area.

More in-depth guidance for thinking through and working with the action briefs, either on your own or with a group, can be found in the ASAE ForesightWorks User's Guide.

## Strategic Discussion Questions

Initial strategic questions are suggested here as a means of creating dialogue and discussion around the action brief set. You may want to choose a subset of the questions or create new questions to have a more targeted conversation with your group.

### Future implications

- How could economic changes, like global trade shifts and growth of the sharing economy, affect our members?
- How could economic change impact our membership?
- How might changing philanthropic priorities affect our bottom line?





## Opportunities and challenges

- What new programs or services could be beneficial in an environment of economic uncertainty and change?
- What are the primary risks to our organization from economic changes?

## Building awareness

- What information do our members need to weather potential changes?
- What potential shifts for our advocacy efforts may be required?
- What dependencies do we have on business partners? How are they positioned to weather economic instability?

## Additional Reading

These articles provide more insight into the drivers of change. They can be shared ahead of a discussion to familiarize the group with the concepts and possibilities captured by the action briefs.

- Harvard Business Review on “Productivity Is Soaring at Top Firms and Sluggish Everywhere Else.” <https://hbr.org/2015/08/productivity-is-soaring-at-top-firms-and-sluggish-everywhere-else>
- Knowledge @ Wharton on “Mega-mergers Are Back, but Will the Pace Last?” <http://knowledge.wharton.upenn.edu/article/mega-mergers-return-but-will-the-pace-last/>
- Price Waterhouse Coopers on “The World in 2050: Beyond the BRICs.” [https://www.pwc.com/la/en/publications/assets/world\\_2050\\_brics.pdf](https://www.pwc.com/la/en/publications/assets/world_2050_brics.pdf)
- McKinsey & Company on “China’s One Belt, One Road: Will it reshape global trade?” <https://www.mckinsey.com/global-themes/china/chinas-one-belt-one-road-will-it-reshape-global-trade>
- Institute for Policy Studies on “Gilded Giving: Top-Heavy Philanthropy in an Age of Extreme Inequality.” <http://www.ips-dc.org/wp-content/uploads/2016/11/Gilded-Giving-Final.pdf.pdf>





The authors have worked diligently to ensure that all information in this work is accurate as of the time of publication and consistent with standards of good practice in the general management community. As research and practice advance, however, standards may change. For this reason it is recommended that readers evaluate the applicability of any recommendations in light of particular situations and changing standards.

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# Cartel Capitalism

**SUMMARY:** Mergers and acquisitions have caused a growing number of industries to be dominated by a smaller number of companies, while in the tech industry, network effects have led to the dominance of firms like Apple, Amazon, and Google. While these firms benefit from economies of scale that cut costs, their dominance can reduce competitiveness and economic dynamism. Additionally, by attracting the best talent, these world-beating firms capture a disproportionate share of productivity growth, contributing to stagnation in the rest of the economy.

## Forecasts

- Enthusiasm for antitrust enforcement has ebbed in the last two decades in the United States. However, accelerating industry consolidation may bring about renewed interest in this form of regulation. Action against prominent tech or health insurance firms could trigger renewed public enthusiasm for antitrust interventions.
- Industries where consolidation has occurred include beverages, household appliances, mobile phone carriers, air travel, grocery stores, health insurance, and pharmaceuticals. These are likely to be primary targets if antitrust sentiment grows.
- Even without regulatory intervention, technology innovation will eventually disrupt some heavily concentrated industries.



## Key Uncertainties

*Willingness of regulators to pursue antitrust investigations*

•

*Effects of changes in the American political landscape*

•

*Effects of potential EU action against U.S. tech firms*

•

*Inevitability of internet firm monopolies*

•

*Relative priority of internationally competitive firms versus nationally competitive markets*



## Supporting Trends

- **Frontier firm dominance.** Productivity improvement is being captured by a small number of elite global companies.
- **Decline in labor's share of income.** The share of U.S. national income going to workers has been declining since 2001.
- **Stalled income growth.** Income growth has stalled for the lower and middle classes in advanced economies.
- **Declining workforce participation.** The workforce participation rate in the United States continues to fall.
- **Economic growth decline.** Lack of transformational technological innovation may curb future productivity growth.
- **U.S. wealth concentration rising.** The share of wealth in the hands of the most advantaged 1 percent of Americans has been rising since the late 1970s.
- **Inequality of opportunity rising in the United States.** Studies have documented widening gaps in opportunity for U.S. children as a function of socioeconomic status.
- **Manufacturing jobs permanently falling.** Deep forces of change are reducing the number of manufacturing workers globally.
- **Oncoming instability.** A period of instability is under way in the international system.

### Related Drivers of Change

- The Stagnation Economy
- American Inequality

## Notable Data Points

### CAPTURING PRODUCTIVITY

A study of 24 advanced economies found that in many sectors,  
**only the elite 5%  
of companies  
have benefited from  
productivity growth**  
between 2001 and 2015.

*Source: Organisation for Economic Co-operation and Development*

### STALLED GENERATIONAL PROGRESS

**65-70% of households**  
in advanced economies  
**experienced flat  
or falling incomes**  
between 2005 and 2014.

*Source: McKinsey Global Institute*





## Strategic Insights

- Associations could play an important role in tracking how dominant firms are able to maintain high levels of productivity growth. Identifying best practices and disseminating them through the industry as a whole could boost the productivity of the entire sector.
- Regulatory intervention may be good for an industry as a whole, but not for its most powerful players. Associations need to walk a fine line in determining whose interests they represent and how to communicate and demonstrate those commitments to their members.
- Associations face the risk of being perceived as beholden to the interests of dominant firms in heavily consolidated industries. They may need to take active measures to differentiate their advocacy for the industry from advocacy for leading firms.
- Associations that rely on organizational membership may need to rethink their membership strategy as companies merge and industries consolidate.

### Timing

- **Stage:** Mature
- **Speed:** Slow, with potential for a triggering event

### Potential Alternative Futures

- **Global field of competition:** Maintaining competitiveness against global rivals overshadows concerns about industry oligopolies, reducing the political will for antitrust intervention.
- **Faltering behemoths:** Innovation enables smaller and more nimble firms to challenge incumbents in more areas. Firms increasingly break up voluntarily to keep up.
- **Cyber public utilities:** Tech firms prove so critical to consumers and the economy that they are converted to 21st-century “public utilities” and expected to serve as infrastructure for other businesses.



## Take Action

- **Monitor mergers and acquisitions.** Mergers of companies set off a chain reaction in trade associations and professional associations that offer organizational membership. Membership dues are affected. People find themselves in new corporate roles where their influence and needs may be different. An association may lose key volunteers or find multiple representatives from the same company on the board or key committees.
- **Find out what the big players need from your association.** Sit down face to face and talk about their needs. Major corporations often have in-house education and training programs for employees, but perhaps they would be open to bulk purchasing of access, welcome in-house custom solutions, or collaborate in sharing their expertise. They may have their own lobbyists who could amplify or conflict with your efforts. Smaller companies may perceive and resent larger companies exercising inordinate influence in association affairs.
- **Refresh your adherence to antitrust practices.** Educate and frequently remind members about what they cannot say and do. If antitrust enforcement increases, associations that are not vigilant expose themselves to legal actions that could destroy their organizations.
- **Open standard-setting processes up to multiple stakeholders.** Major companies are more willing to devote experts and time to lengthy and complicated standard-setting processes. As corporate leaders consolidate, their interests could be magnified. To offset this influence, standard-setting organizations may need to recruit additional stakeholders, including user and public representatives.

## Keyword Search

To continue researching this change driver, use these search terms:

*neoliberalism, neoliberal, crony capitalism, winner-take-all economy, industry consolidation, frontier firms, FIRE economy, rentier capitalism, market concentration, HHI index, mergers*

### Who Will Be Affected

This is a mature driver of change for trade associations, particularly in industries experiencing extensive mergers and acquisitions. Professional associations with individual members will experience the downstream effects as major companies become the dominant employers and exert their influence in education, advocacy, and other association services. Associations and nonprofits also experience changes in who their corporate partners and donors are.

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# Global Power Shifts

**SUMMARY:** Existing global power structures are breaking down, as new centers arise and power diffuses. Power is shifting among nation-states and flowing to several kinds of transnational and sub-national organizations and groups. This will change the operating environment for associations, especially those with cross-border reach.

## Forecasts

- The United States and Europe are both on a trajectory for a relative decline in world power, with Europe falling faster than the United States due to its economic stagnation and demographic aging.
- The institutional priorities and practices of international bodies such as the World Trade Organization and ICAAN, the internet supervisor, will shift as emerging markets come to the fore.
- The informal rules of international systems will change as different cultures assert their perspectives in the world.
- Some forecast not new leadership but less, as old powers decline before new powers step up to fill their positions.
- In a high-inequality, globalized era, more one-man powers will arise, in the style of Bill Gates and Elon Musk. They will have the power to change global agendas and shift the course of technologies.

## *Key Uncertainties*

*Level of cooperation versus conflict in the international system*

•

*Trajectory of economic growth by China, India, Brazil, and other rising powers*

•

*Durability and stability of the socio-political system of China and some other rising powers*

•

*The state of globalization*

•

*Evolving power of multinational companies, which increasingly include companies from emerging markets*



## Supporting Trends

- **Diffusion of global power.** Power is becoming more dispersed in the global system. China has achieved great power status. Russia has partially recovered from the Soviet collapse. In Asia, Japan and India are more assertive than in the recent past. Beyond states, non-state actors such as militias and terrorist groups are involved in most conflicts and are rarely controlled fully by a government.
- **Oncoming instability.** Multiple factors are reducing the stability of the global system. China and Russia are asserting themselves aggressively. The 2016 election in the United States brought to power a president who openly questioned many of the diplomatic structures the United States has built since 1945.
- **European Union in rough waters.** Expansion and strengthening of the EU are faltering, and the organization is likely to contract for the first time with the departure of the United Kingdom in “Brexit.”
- **Blurred war and peace.** The line between conflict and peace is blurring. State-versus-state conflicts have become rare, but other kinds of war continue, usually involving non-state combatants. States are pursuing alternate forms of conflict, including “hybrid warfare” and cyberwar.
- **Illiberal democracy.** Several Western countries have begun to move away from liberal democratic political structures and practices.

### Related Drivers of Change

- The Stagnation Economy
- American Inequality
- Aging World
- Shifting Terrain for Advocacy

## Notable Data Points

### MODELS OF POWER

By a measure of power that combines economics, demography, technology, and military capability, the **U.S. holds 19% of global power.**

Forecasts predict China will overtake the U.S. in 2022, and India will surpass the U.S. in 2042.

*Source: Frederick S. Pardee Center for International Futures*

### BELIEFS ABOUT POWER

As of 2016,  
**34% of Americans already thought China was the world's leading economic power;**  
54% thought the United States led.

*Source: Pew Research Center*

### THE STRENGTH OF WEAKNESS

A study found that the **militarily weaker side won in 55% of all conflicts** from 1950 to 1998.

*Source: International Security*



## Strategic Insights

- Global rules of all kinds—for instance in trade, telecommunications, or banking—will be set by more diverse actors and originate from more places. The United States and Western Europe will remain important in rule setting, but those seeking to influence policy will have to range more widely to find stakeholders.
- The diffusion of economic and scientific power, and the relative decline of the United States, will make truly transnational associations a more logical fit to represent some kinds of industries and fields. This will be especially true within scientific fields.
- This diffusion will also create rising global competition among national organizations and associations from rising powers, especially as they stake out turf in their home regions. This will boost the potential role for partnerships and federations across borders.
- Some kinds of power vacuums in global systems could leave space for associations to assert themselves in new or larger roles in agenda setting or rule making.
- How American power and influence are perceived abroad will affect the desirability of the United States as a destination for immigration, including skilled immigration by scientists, entrepreneurs, and technologists.

### Timing

- **Stage:** Growth, with signals of emergent new phases
- **Speed:** Medium, though subject to potential sudden discontinuities

### Potential Alternative Futures

- **Assertive nation-states:** Security concerns and populist politics cause national governments to reassert their power over cross-border issues and economic affairs, including trade and investment. Globalization either falters or is at least more tightly regulated.
- **Fractured world:** International rules and structures break down under pressure from new actors but are not replaced by new rules and systems—leaving the world more chaotic and buffeted by assertions of pure power, both political and economic.



## Take Action

- **Run a risk assessment on your global strategy.** This requires scenario planning asking the “what ifs” in a highly dynamic situation. Rely on stable channels. Despite cybersecurity concerns, digital communications may be more reliable than mail. Some partnerships and coalitions will be better at surviving dynamic situations. Have your Plan B ready.
- **Resist avoidance.** For associations with modest global aspirations, the temptation will be strong to put global opportunities on hold. Talking today about these options will make it easier to exercise them when the path forward is clear.
- **Be alert to emerging centers of influence in your field.** People follow opportunity, and long term this could create new centers of expertise and influence as rising powers recruit highly educated and talented people. If U.S.-based education and credentialing becomes less attractive, associations depending on these programs could suffer.
- **Step into the power vacuum.** Associations could have new opportunities for agenda setting and rulemaking. These power shifts could particularly affect standards-setting organizations like ISO and ANSI.
- **Monitor security concerns.** Association executives and members travel the globe. Associations seeking alliances and partnerships in other countries need to be on alert.
- **Make the case for the USA.** Despite growing perceptions to the contrary, the United States still enjoys many economic, technical, and societal advantages. Help marshal the facts for your field to assert these continuing strengths while working to address your weaknesses.
- **Identify your global actors and bridge builders.** Know which members have these relationships and work through them to navigate uncertain situations.

## Keyword Search

To continue researching this change driver, use these search terms:

*geopolitics, power, soft power, hard power, China, United States, European Union, non-state actors, business, Trump, decline, multinational, transnational, global system, conflict, stability, hybrid warfare, fourth generation warfare*

### Who Will Be Affected

Global organizations have to be on top of these global power shifts. Trade associations are more likely to have members operating globally. If interest in U.S.-based education, credentialing, and standard-setting declines, organizations offering these programs and services will be affected.

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# Philanthropy Reshaped

**SUMMARY:** Demographic and political changes, loss of trust in institutions, and the growth of donor-advised funds and impact investing will drive shifts in the channels, targets, and geographic focus of American philanthropy. These shifts will offer opportunities for associations to access new resources, engage new members, and create new partnerships.

## Forecasts

- Charitable giving will continue to grow, although big donors will contribute an increasing percentage and will often prefer to fund their own foundations and direct philanthropy.
- A growing share of givers will be women and people of color.
- Donor-advised funds, venture philanthropy, and impact investing will grow, potentially blurring lines between sectors.
- Growing distrust of institutions will affect philanthropy; a 2015 *New York Times* op-ed described it as a sector with too much secrecy and too little oversight and outside accountability.
- Millennials—who often seek to integrate values, investment, entrepreneurialism, and careers—will want to go beyond donation to engagement and launching social enterprises.
- Social media and data analysis will continue to affect charitable giving, enabling transparency, donor engagement, and peer-to-peer fundraising.

## Key Uncertainties

*Performance of the economy*

*Political climate and potential legal and regulatory changes—e.g., to the charitable giving deduction, rules for donor-advised funds, or rules for political contributions*

*Evolving role of government at all levels in addressing educational, social, and environmental issues*

*Evolving relationship among philanthropic institutions and endeavors, corporations, and government entities*



## Supporting Trends

- **Waning trust in philanthropy.** Philanthropy is falling victim to the growing public distrust of institutions and elites.
- **New forms of philanthropy.** Donor-advised funds and impact investing are expanding channels for philanthropic activity.
- **Philanthropy growth.** U.S. charitable giving is rising, though headwinds could develop.
- **U.S. wealth concentration rising.** The share of wealth in the hands of the most advantaged 1 percent of Americans has been rising since the late 1970s.
- **Intergenerational wealth transfer.** As the U.S. baby boomer generation dies, a massive amount of wealth will be transferred to their heirs or donated to charity.
- **Ethics and transparency.** Growing transparency spotlights organizational ethics.
- **The ethical economy.** Younger U.S. consumers are pushing a trend toward more ethical and values-driven spending.
- **Millennials now the largest U.S. generation.** Millennials have surpassed baby boomers in numbers.
- **Millennial doubts.** Millennials mistrust large institutions—transparency and compelling stories are more important than organizational reputation in their decision making.

### Related Drivers of Change

- American Inequality
- The Splintered Society
- Aging World
- Declining Trust
- Ethical Consumption

## Notable Data Points

### GROWTH IN GIVING

Total U.S. charitable giving is  
**forecast to grow  
3.6% in 2017**  
and 3.8% in 2018.

*Source: Indiana University's Lilly Family School of Philanthropy and Marts & Lundy, The Philanthropy Outlook*

### TOP-HEAVY GIVING

From 2003 to 2013,  
**itemized charitable  
deductions**  
from those making \$100,000 or more  
**increased by 40%,**  
but itemized charitable deductions  
from those making less than  
\$100,000 declined by 34%.

*Source: Institute for Policy Studies, Gilded Giving: Top-Heavy Philanthropy in an Age of Extreme Inequality*

### DONOR-ADVISED FUNDS

Between 2010 and 2015,  
contributions to donor-advised funds  
**grew from \$9.4 billion  
to \$22.3 billion.**

*Source: 2016 Donor-Advised Fund Report, National Philanthropic Trust*



## Strategic Insights

- As charitable giving grows, associations have an opportunity to expand their capacity for generating and effectively using gifts. One key will be to leverage the latest IT-enabled strategies to crowdfund research and charitable causes.
- There is an opportunity to build partnerships across associations and among associations, foundations, corporations, and government bodies to carry out philanthropic work most effectively.
- Initiating or expanding philanthropic work could be a means to attract millennials to associations by engaging them in “doing good.”
- At the other end of the demographic continuum, retiring baby boomers can form a cadre of volunteers in association philanthropy.
- Philanthropy makes wealthy individuals strategic actors on issues of importance to associations—actors who can single-handedly shape the landscape in their area of interest.
- Given calls for more openness in the world of philanthropy, charitable work done transparently could be a way to build trust in associations.

### Timing

- **Stage:** U.S. philanthropy on a long-term growth track after a pause during the Great Recession
- **Speed:** Slow, relatively steady growth in giving; slow to moderate growth for most other changes impacting philanthropy

### Potential Alternative Futures

- **The mighty fall:** A reversal of fortune for tech-industry giants has a negative effect on major philanthropy efforts.
- **Regulatory shift:** Changes in the status of the charitable-giving tax deduction and of other regulations curb giving and restrict how gifts may be used.
- **Scandal:** A highly publicized misstep by a respected foundation puts downward pressure on giving.
- **Transformation:** New relationships across the for-profit, not-for-profit, and government sectors create an entirely new philanthropy landscape.



## Take Action

- **Update your association foundation's purpose.** If your historic mission and funding priorities don't excite donors, it's time for a reset. Redefine your purpose, rebrand, and engage top volunteer leaders and new types of donors in work that matters to your community.
- **Practice frictionless donating.** Maximize every transaction, especially online, as an opportunity to give. Aim for sustaining or multiple micro-gifts to build your base and grow your major gift potential.
- **Make donors part of a great story.** Use social media to draw people into an exciting story and make them visible participants in organizing and generating the momentum to do great things.
- **Mind your data and mind your donors.** Use predictive analytics to discover new donors, identify their interests, and match them to their preferred mode of giving. Use targeted marketing to increase your stewardship communications to reinforce what their gifts accomplish.
- **Enable directed giving within mission.** Let donors put their money where they want to have an impact. Have a clear mission and policies that lower the temptation to take money attached to pet projects. Partner with industry to seed work in new arenas. Be forewarned that when billionaires bankroll selected institutions and people, they may create tensions and disparities among your members.
- **Partner for greater impact.** Many association foundation staffs tend to be small or dual-purpose association employees. Increase your foundation's impact by collaborating with other nonprofits. Increase their capacity by turning to consultants and freelancers for campaigns and special projects.

## Keyword Search

To continue researching this change driver, use these search terms:

*impact investing, donor-advised funds, venture philanthropy, social enterprises, peer-to-peer fundraising, high-tech philanthropy, data-driven philanthropy, social innovation*

### Who Will Be Affected

Association foundations are following leading philanthropic and charitable organizations in reshaping how they conduct fundraising and promote philanthropy. Billionaire philanthropists are setting priorities in healthcare, science and research, and the environment. Associations allied with education as well as art, humanities, and culture work closely with foundations and an array of nonprofit organizations with the power to shape priorities.

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# The Sharing Economy

**SUMMARY:** The sharing economy—a peer-to-peer exchange of goods or services—will continue to grow globally and expand into new areas of commerce, although regulatory issues constitute a key uncertainty. The sharing economy portends a shift in the balance between access and ownership, from ownership of resources to access to goods and services. Organizations that broker exchanges between owners and users play a pivotal role in this economy.

## Forecasts

- The sharing economy will grow. eMarketer forecasts that sharing economy use among U.S. adults will rise from 10.8 percent in 2016 to 15.3 percent in 2020.
- Consumers who choose sharing over ownership will have a lower level of control over these shared resources, and they may need to accept, as examples, uncertainty in the timing or availability of rides or lodging.
- Retirement and household downsizing in developed economies could boost demand for the sharing economy; sharing their resources could also supplement the income of retirees.
- The sharing economy will enable those with modest (or even substantial) means to sample more affluent lifestyles.

## Key Uncertainties

*Changing regulatory climate for sharing platforms, a potential barrier to or enabler of growth*

•  
*Economic conditions driving demand for and availability of shared resources*

•  
*Changes in demand for sharing as generations, especially millennials, enter new life stages*

•  
*Changing expectations about cost of and control over shared goods and services*

•  
*Extent of mutual reinforcement between the sharing and experience economies*

•  
*New economic opportunities for vulnerable populations who gain as-needed access to new resources*



## Supporting Trends

- **The ethical economy.** Younger U.S. consumers are pushing a trend toward more ethical and values-driven spending.
- **Millennial doubts.** Millennials mistrust large institutions—transparency and compelling stories are more important than organizational reputation in their decision making.
- **Service sector productivity.** Service sector productivity is an increasingly important component of economic growth.
- **Worker reputation systems.** Reputation systems have the potential to effectively match prospective workers to organizations.
- **Alone together.** Single people, young and old, are turning to communal living for social and economic reasons.
- **Inequality of opportunity rising in the United States.** Studies have documented widening gaps in opportunity for U.S. children as a function of socioeconomic status.
- **U.S. income inequality rising.** U.S. income inequality has been rising since the mid-1970s.
- **Autonomous vehicles under development.** Automakers, IT companies, and ride-sharing services are developing driverless cars.

### Related Drivers of Change

- Declining Trust
- Ethical Consumption
- Blockchain Platforms
- Reputation by the Numbers
- The Stagnation Economy

## Notable Data Points

### USERS

Americans who use a broad range of shared, collaborative, and on-demand services  
**tend to be well-educated,  
higher income,  
and under age 45.**

*Source: Pew Research Center*

### CONSUMER EXPECTATIONS

The majority of  
**American ride-sharing  
users believe that the  
companies are primarily  
software platforms**  
and drivers are independent contractors,  
but they expect companies to ensure safety.

*Source: Pew Research Center*

### ACCESS

**57% of Americans familiar  
with sharing agree**  
with the idea that access is the new ownership.

*Source: PricewaterhouseCoopers, The Sharing Economy*





## Strategic Insights

- Trade associations will need to monitor the impact of the sharing economy on the market for products and services provided by their members, help their current members prepare to compete effectively in a marketplace that includes sharing economy providers, and consider how they might serve those providers.
- Associations have the potential to act as brokers for the sharing of goods and services between their members. This may be especially true for rare, expensive, or hard-to-locate resources.
- As the sharing economy grows, it may elevate expectations for ready access to “unowned” and open-access services and resources. Associations themselves can be the “lenders” of these resources.
- There may be opportunities for associations to co-create resources with their members—for example, by sharing data with members who, in turn, add value through analysis or interpretation and share it back with the association. A wiki format is a simple example of such a shared resource.
- There may be opportunities for groups of associations to establish a multi-association sharing economy of resources, which could include data and information, training curricula, etc.

### Timing

- **Stage:** Growth, in relatively early stages
- **Speed:** Forecasts for moderate to rapid growth

### Potential Alternative Futures

- **Disintermediation via blockchain:** Blockchain technology replaces economic intermediaries, including sharing economy platforms like Uber and Airbnb.
- **Economic divide:** The sharing economy reinforces the economic divide between privileged owners and renters or users.
- **Labor clout:** Growth and evolution of the sharing economy increase the negotiating power of labor in the economy.
- **Rethinking ownership:** New ownership models grow, superseding traditional patterns of personal resource ownership and corporate shareholding.



## Take Action

- **Pursue access and impact as alternatives.** When pricing or packaging association content and other products, decide whether you need reach and impact or profit in deciding what to share and what to sell or put behind the member paywall. Design business models that offer different types of access as alternatives to ownership.
- **Look for found resources you can share.** Your association may have excess office space or technologies; your staff may have expertise other associations need; your conference may have over-contracted for meeting space and hotel rooms. You may have education courses and materials others could use. Capture the potential revenue from underused resources.
- **Avoid restraint of trade charges.** Industry disruptors may defy existing laws, standards, and business practices. Trade associations need to handle these challenging new entrants with care.
- **Assert and defend your intellectual property.** Intellectual property can be a fluid issue in associations where members are both creators and consumers, and who owns an idea can be disputed. Many people treat information as free for sharing, so set clear policies and enforce them.
- **Find the sharing in your economy and facilitate it.** Pay attention to the sharers in your membership and find ways to facilitate or broker their efforts to share knowledge, services, and products through peer and business exchanges.
- **Boost reputations through sharing.** Consultants, freelancers, and younger members need platforms to establish themselves. Associations can help them gain visibility and increase the availability and quality of expertise within the association's marketplace.

## Keyword Search

To continue researching this change driver, use these search terms:  
*collaborative consumption, collaborative economy, gig economy, peer economy, on-demand economy, uberization, commons-based peer production, Uber, Lyft, Airbnb*

### Who Will Be Affected

Industries competing with underused capacity or against technology-enabled transactions are vulnerable to disruption. Airbnb adds a new risk factor into conference room block contracting. Association management companies offer multiple associations shared expertise and staffing. Donors and funders increasingly expect philanthropic and charitable organizations to share their capacity to solve problems.

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# The Stagnation Economy

**SUMMARY:** U.S. economic growth is slowing—the recovery since 2007 has been steady, but it is the slowest recovery since WWII. Productivity growth is also slowing, and there are concerns that innovation may be decelerating as well. The result is a contracting middle class, with weak job and wage growth and no clear solutions in sight. Lackluster economic growth may linger throughout the rest of the decade, despite an economic environment that seems generally stable and healthy.

## Forecasts

- Tech firms are innovating at a rapid pace in internet technology and services, but their growth likely will fuel only modest job creation. New tech-enabled, platform-based services can be a disruptive force in a given industry. However, they will continue to fall short of becoming the transformational innovators that give rise to entirely new spinoff industries.
- Many markets are dominated by a handful of leading firms, which can impede disruptive innovation. These firms may capture an inordinate share of future growth until new technologies or regulatory interventions destabilize their market dominance.
- Technology innovation can drop the price of goods while increasing their capabilities (e.g., HDTVs). Consumers may perceive an improving quality of life, even if economic growth is weak.

## *Key Uncertainties*

*Ability of financial institutions  
to maintain status quo*

*Future funding levels for scientific research*

*Whether R&D spending comes from  
the public sector or the private sector*

*Ability to preserve political stability given  
continued economic stagnation*

*Impact of artificial intelligence  
and automation on productivity growth*



## Supporting Trends

- **The end of rapid economic growth.** Lack of transformational technological innovation may curb future productivity growth. IT innovation may not bring the same economic growth as past technological innovations like electricity, the automobile, or petrochemicals.
- **Frontier firm dominance.** Productivity improvement is being captured by a small number of elite global companies. These firms may be maintaining their dominance by attracting high performers, leveraging extensive patent portfolios, and developing a world-beating ability to execute in their markets.
- **Stalled income growth.** Income growth has stalled for the lower and middle classes in advanced economies. Millennials may be the first generation in 70 years to not surpass the incomes of their parents.
- **Headwinds for global trade.** Obstacles to the expansion of global trade are proliferating, with globalization facing a growing backlash in both the United States and European Union.
- **Declining U.S. workforce participation.** A declining percentage of working-age American adults are in the workforce.
- **Shrinking American middle class.** People in middle-income households have decreased to 50 percent of Americans.
- **Rising U.S. income inequality.** U.S. income inequality has been rising since the mid-1970s.

### Related Drivers of Change

- American Inequality
- Trade in Transition
- Global Power Shifts
- Aging World

## Notable Data Points

### DECLINING WORKFORCE PARTICIPATION

**In 2016, America's civilian workforce-participation rate dropped to 63 %,** the lowest in nearly 30 years. The Bureau of Labor Statistics projects it will not improve, with 62% participation in 2022.

*Source: U.S. Department of Labor Bureau of Labor Statistics*

### WINNER-TAKE-ALL MARKETS

In many sectors,  
**the elite 5% of companies benefited** from productivity growth between 2001 and 2015, while the other 95 percent of firms had minimal improvement.

*Source: Organisation for Economic Co-operation and Development*

### STAGNANT HOUSEHOLD-INCOME GROWTH

**65-70% of households in advanced economies experienced flat or falling incomes** between 2005 and 2014. In absolute terms, that means that between 540 million and 580 million people in advanced economies face declining upward mobility.

*Source: McKinsey Global Institute, Poorer than their parents? A new perspective on income inequality*



## Strategic Insights

- Association members in many fields could continue to feel cost sensitivity about membership, dues, registrations, and other service fees.
- Members of associations in low-growth job markets will place higher value on the ability of an association to facilitate professional networking and finding job opportunities. Associations could enhance their role as a job and talent matchmaker by expanding job board programs and developing new employment-focused offerings.
- Given the stagnation in developed markets, associations could grow their membership by strengthening their outreach in faster-growth emerging markets. Associations that do this will need to weigh whether collaborating with local partners or going it solo is the right approach.
- In some cases, strong growth in emerging markets could elevate the national or regional associations in these countries. Their increasing strength and visibility could impede efforts of U.S. associations to expand their global outreach.
- Associations can be a driver of funding foundational industry research. This could be by lobbying, direct grantmaking, industry funding partnerships, or even crowdsourcing.

### Timing

- **Stage:** Mature
- **Speed:** Slow, though this could change rapidly in the event of an economic crisis

### Potential Alternative Futures

- **Emerging market growth:** Emerging markets are the only economies experiencing sustained healthy growth.
- **Trustbusting tech:** Dominant tech firms fall afoul of antitrust sentiment, leading to breakups and revived innovation.
- **Crisis and renewal:** Another economic crisis causes short-term harm, but incites financial and economic reforms that spur growth.
- **Jobless growth:** Deployment of automation tech jumpstarts “jobless” economic growth, in which expansion is no longer linked to job creation.





## Take Action

- **Analyze your financial risks.** All forms of association revenue can be at risk. Reduce your reliance on any source of revenue through diversification of nondues revenue. Review your reserve policies to ensure that you have adequate funds for business continuity if the economy staggers.
- **Understand who is winning and losing in your industry.** Even within the same industry, you may have members in different sectors, socioeconomic groups, and geographic areas who face more severe economic impacts.
- **Revamp your approach to membership.** Adjust membership models to unbundle or tier benefits. Provide discounts and incentives to retain struggling members. Millennials with slower wage growth and student debt may hold membership to a higher return on investment. Membership growth and retention may no longer be a realistic metric for assessing association performance.
- **Help underwrite research and development.** If you have the resources, use them to sponsor innovation and research programs and grants that could help mitigate declining investments by government and business. If you fund research, consider taking a financial stake in any patents or discoveries.
- **Teach members to thrive against the odds.** Educate your members to have the resiliency and leadership skills to be winners in a challenging job market. Boost your career, mentoring, and networking services.
- **Anticipate a volatile political agenda.** Protecting members' economic interests will continue to be a priority. So many pending U.S. policy issues could have a potentially disruptive impact on the economy. State governments also may take actions that affect regional and chapter members.

## Keyword Search

To continue researching this change driver, use these search terms:

*secular stagnation, great recession, great stagnation, second machine age, low-growth economy, innovation decline, stagnant wage growth, new economic models*

### Who Will Be Affected

Associations and businesses in competitive markets may not survive long-term economic stagnation. Associations and nonprofits that respond when people are in need could see membership and donations increase. Associations representing businesses where consumers can delay purchases or services may see their members struggle. Financial institutions will feel increased pressure to take risks to overcome slow rates of return on investment.

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# Trade in Transition

**SUMMARY:** The rules of global trade are up in the air, with growing uncertainty about whether the trend toward global trade harmonization will be maintained. The United Kingdom and the United States have begun renegotiation of once-settled trade policies that supported economic globalization, pushing the world trade system toward economic nationalism.

## Forecasts

- Trade policy for the United States and the European Union will have a high degree of uncertainty through at least 2020. Trump administration tariffs on targeted industries, Brexit, and E.U. financial challenges all have the potential to destabilize established trade policies.
- Uncertainty also originates outside the trade arena as secondary effects of geopolitical conflict and domestic politics. Territorial disputes in the South China Sea, conflict in the Middle East, and the E.U.'s refugee crisis all add to global trade instability.
- With Brexit and the U.S. withdrawal from the Trans-Pacific Partnership, and the renegotiation of the NAFTA agreement, the world is likely entering a period that shifts trade agreements away from multilateral pacts and toward narrower bilateral trade agreements.
- China, India, and other rising economies will have greater influence and more rulemaking power in the future global trade system.

## Key Uncertainties

*Stability of the European Union*

•

*Electoral outcomes in the United States and Europe*

•

*Potential for bilateral trade wars*

•

*Strength of populism and nationalism*

•

*Impacts of tariffs*

•

*Linkage of trade to strategic, environmental, or human rights issues*

•

*Spillover effects from geopolitical conflict*



## Supporting Trends

- **Headwinds for globalized trade.** Obstacles to the expansion of global trade are proliferating, with skepticism about globalism growing in both the United States and European Union.
- **Chinese economic power.** Rapid Chinese economic growth in recent decades has made China a major economic power.
- **China shifting to services.** China's economy is increasingly dominated by services.
- **E.U. in rough waters.** Expansion and strengthening of the European Union are faltering.
- **Oncoming instability.** A period of instability is under way in the international system, driven by assertive rising powers, regional crises, and political upheavals in the United States and European Union.
- **Diffusion of global power.** Power is becoming more dispersed in the global system. The world is becoming increasingly multipolar, with countries like China and India rising and nonstate actors growing in importance.
- **Isolationism.** Isolationism is rising in the developed world.
- **Growing middle classes in emerging markets.** The middle classes of emerging markets continue to grow, though at a slower pace than in recent decades.
- **Declining role for manufacturing in development.** Manufacturing is having less and less of an impact on developing economies in recent decades.

### Related Drivers of Change

- Global Power Shifts
- The Stagnation Economy

## Notable Data Points

### PUBLIC FAITH IN FREE TRADE

**56% of U.S. adults believe that free trade agreements have been a “good thing”**  
for the country, while 30% believe these agreements have been a “bad thing.”

*Source: Pew Research Center*

### GLOBAL MIDDLE CLASS

**The global middle class**  
 (“defined as households with daily expenditures of \$10-100 per person”) **will reach 4.9 billion people in 2030,**  
up from 1.8 billion in 2009.

*Source: Organisation for Economic Co-operation and Development*



## Strategic Insights

- Association members are likely to have high uncertainty about the future of trade and how changes to the international trade system will affect them. Elevating efforts to monitor, report, and assess the impact on trade changes will be an increasingly valuable service for members.
- A changing trade landscape creates a more complex environment for association lobbying and advocacy. The new environment could involve more bilateral relationships and potentially reduced influence by centralized international trade groups (e.g., the World Trade Organization).
- International trade in services may dodge some of the growing impediments to international trade. New types of industries—and thus associations—may be dealing with cross-border issues. Professionals providing services to foreign markets may be more interested in joining associations headquartered in those markets.
- An environment of declining interest in international cooperation, growing conflict, and increasing focus on national self-interest could impede efforts to grow membership across borders.

### Timing

- **Stage:** Emergent, as trade may be entering a new era
- **Speed:** Fast, with accelerating policy changes

### Potential Alternative Futures

- **Pause in globalization of trade:** The globalization of trade pauses and even retreats in some areas, but over time globalizing forces re-exert themselves.
- **Trade bilateralism:** Shifts in U.S. trade policy and a fracturing of the European Union lead to a new era of bilateral trade agreements, which preserves many of the efficiencies of trade harmonization but elevates national economic interests.
- **Emerging market shift:** Emerging markets take on a dominant role in international trade negotiations, fueled by relatively strong growth in their economies and middle classes.



## Take Action

- **Do scenario planning for this period of uncertainty between now and 2020.** With no one able to anticipate the potential outcome of the Trump administration's shifts in trade policies and the impact of Brexit on the European Union, it's a good time to use scenario planning to develop alternative strategies for different outcomes.
- **Offer study missions and technical guidance to navigate the changing business environment.** Small and medium-sized businesses will turn to their associations to sort out this unsettled trade situation. Study missions build relationships and confidence to counter confusing laws and regulations.
- **Develop alliances with organizations with in-country expertise.** If multilateral agreements are replaced with a series of bilateral agreements, you will need the help of experts tracking these developments more closely than you can on a daily basis.
- **Pursue the growth of middle-class education opportunities.** While the future of globalization may be in question, the middle class continues to grow globally. This creates a market demand for global education and knowledge exchange. Trade and immigration policies could alter the attractiveness of pursuing these opportunities, but many technical and scientific fields appreciate the global nature of their work.
- **Manage the risks of trade in transition.** Financial markets respond to uncertainty, and this could depress returns on financial investments. You might experience broken links in a critical global supply chain for products and materials necessary to your members or your association. If you are a standard-setting organization or an accrediting organization, you may experience some blowback from restrictive trade policies and increasing nationalism.

## Keyword Search

To continue researching this change driver, use combinations of these search terms:

*globalization, protectionism, tariffs, border adjustment tax, multilateral trade agreements, Brexit, GATT, Transatlantic Trade and Investment Partnership, Trans-Pacific Partnership, Belt and Road Initiative, Trade in Services Agreement*

### Who Will Be Affected

Trade associations representing companies relying on global supply chains must help manage this change. Standard-setting and accrediting organizations may also find any shift away from global harmonization unsettles their market. Associations holding global meetings could find it more difficult to operate in other countries or attract out-of-country registrants. Any association pursuing a global strategy will have to evaluate this driver of change.

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# Society and Politics Action Set

The internet is transforming social and political life, shattering the mass media channels of the twentieth century and replacing them with a wider variety of voices and viewpoints. This process is contributing to greater social fragmentation and polarization, and diminishing the power and authority of the gatekeepers that help maintain public consensus. Increasingly, the internet allows for the filtering of information, making it easier for marketers and others to target niche demographics and include, exclude, or manipulate the information presented to a given group. In some areas, technological innovation is outpacing legal system and regulatory structures. In a world filled with “fake news,” consumers are attracted to authenticity—found in the shared values and ethics of companies they do business with and the transparency of the organizations that they support and affiliate with.



Social transformations present an opportunity for associations to play a more prominent role as a trusted voice in their community, and a means for members to find community in an increasingly fragmented society. To assist with this vital task, the ASAE Foundation collaborated with a research team from Signature i and Foresight Alliance to create the ASAE ForesightWorks Society and Politics Action Set. The action set includes eight action briefs that introduce the drivers of change that will shape the future direction of society and politics worldwide. Each action brief explores forecasts, implications, and potential responses for organizations as they move forward.

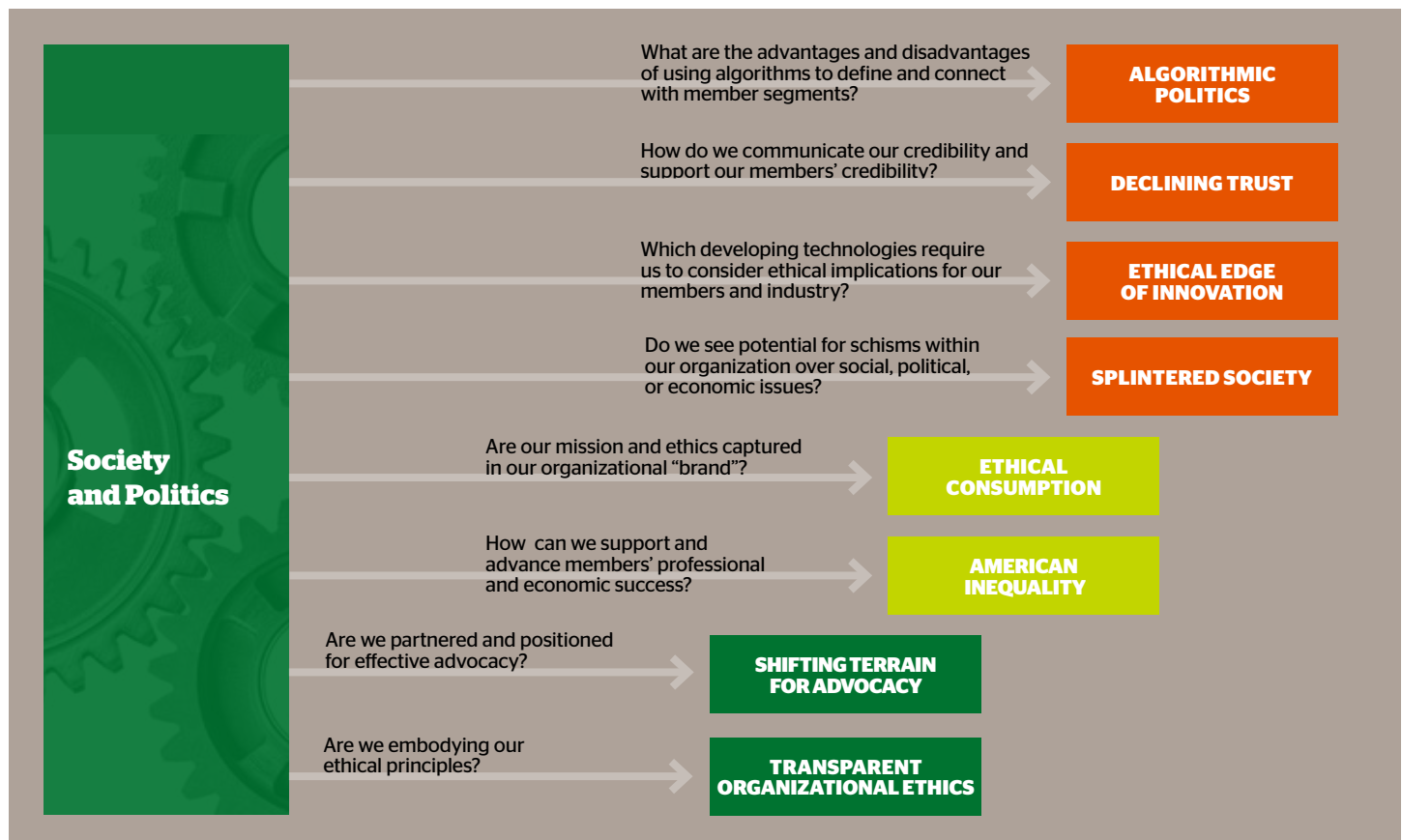
## Putting the Drivers of Change Into Context

The accompanying graphic connects each of the drivers of change to key questions related to the future of your organization or industry. The action briefs are designed to stimulate your thinking about implications, actions, and possible outcomes, as well as to inform and inspire new directions for your strategic planning, risk management, innovation, and environmental scanning efforts.

### KEY:

- Moving fast
- Medium speed or emergent
- More time to plan and prepare

Source: ASAE ForesightWorks







## The Elements of an Action Brief

Each action brief consists of four pages. These pages have been designed to work together or to be used independently for different purposes and audiences.

Page one can serve as a standalone page that summarizes the driver of change and its importance, or as an introduction to the other pages. This page provides a summary paragraph, forecasts—"probable futures" given the current trends and data—and key uncertainties—the "known unknowns" that need to be watched and considered when making downstream forecasts.

Page two is the supporting data page. This page elucidates some of the key trends that informed the forecasts, points to related ASAE ForesightWorks action briefs to help readers develop a comprehensive view, and provides a couple of supporting data points. The page provides evidential support for the forecasts described on page one.

Page three is the strategic insights page. Here you'll find material to help you discuss the driver of change in a strategy session. The page includes broad insights, the projected timing and speed of the change, and some potential alternative futures—possible (though not probable) futures that should be considered from a risk management perspective.

Page four suggests potential actions. This page offers specific steps for addressing the change, identifies the types of organizations expected to be affected, and keywords to support continued research in this action brief area.

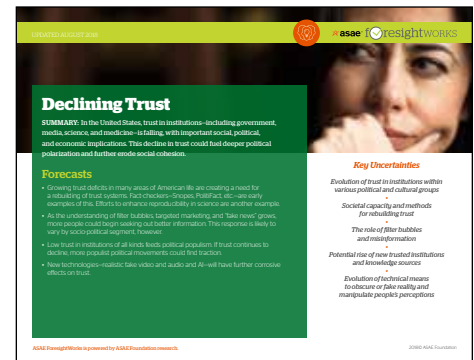
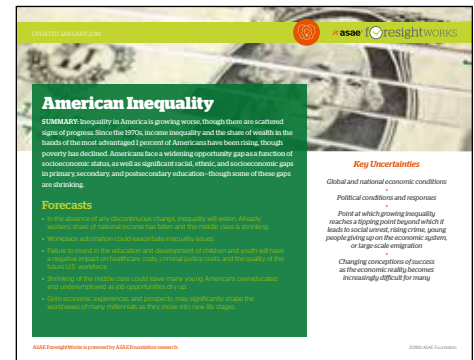
More in-depth guidance for thinking through and working with the action briefs, either on your own or with a group, can be found in the ASAE ForesightWorks User's Guide.

## Strategic Discussion Questions

Initial strategic questions are suggested here as a means of prompting discussion around the action brief set. You may want to choose a subset of the questions or create new questions to have a more targeted conversation with your group.

### Future implications

- What are the issues that would drive our association to take a stand? How prepared are we to handle questions from members, media, or the public?
- How would members respond to a focus on transparency, or more explicit stands on social or political issues?





## Opportunities and challenges

- How do we use information customization and targeting beneficially?  
Are there more effective ways to segment membership groups in our messaging and communication?
- Could “over-personalization” lead to disconnected member subgroups?  
How might we counterbalance the desire for personalization with the need to build a community?
- Could social divides spill over into conflict between factions within our membership? Do we need to address member positions that may not align with our organizational values?

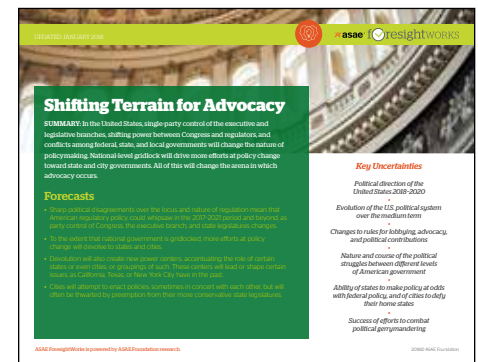
## Building awareness

- What can we do as an association to build and maintain the trust of the membership?
- How might we alert membership to ethical challenges and concerns around emerging technologies?

## Additional Reading

These articles provide more insight into the drivers of change. They can be shared ahead of a discussion to familiarize the group with the concepts and possibilities captured by the action briefs.

- The New Yorker on how “America Continues to Ignore the Risks of Election Hacking.” <https://www.newyorker.com/news/news-desk/america-continues-to-ignore-the-risks-of-election-hacking>
- The Atlantic on “Trust Is Collapsing in America.” <https://www.theatlantic.com/international/archive/2018/01/trust-trump-america-world/550964/>
- Pew on “Far more Americans say there are strong conflicts between partisans than between other groups in society.” <http://www.pewresearch.org/fact-tank/2017/12/19/far-more-americans-say-there-are-strong-conflicts-between-partisans-than-between-other-groups-in-society/>
- The Atlantic on “What Facebook Did to American Democracy.” <https://www.theatlantic.com/technology/archive/2017/10/what-facebook-did/542502/>
- Wired on “The Fake News Culprit No One Wants to Identify: You.” <https://www.wired.com/story/fake-news-social-media-danah-boyd/>
- The Economist on “Facebook faces a reputational meltdown.” <https://www.economist.com/news/leaders/21739151-how-it-and-wider-industry-should-respond-facebook-faces-reputational-meltdown>





The authors have worked diligently to ensure that all information in this work is accurate as of the time of publication and consistent with standards of good practice in the general management community. As research and practice advance, however, standards may change. For this reason it is recommended that readers evaluate the applicability of any recommendations in light of particular situations and changing standards.

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# Algorithmic Politics

**SUMMARY:** The power of algorithms to influence politics—shaping the way information flows, manipulating individuals, and even participating as bots—is increasing. There is growing public concern that the same internet algorithms that customize content and personalize online interactions enable tech companies to imperceptibly filter information, alter and focus attention, and provide conduits for messaging micro-demographic niches.

## Forecasts

- Concerns about algorithmic persuasion will combine with the growing concerns about the political impacts of information bubbles and “fake news.” Ultimately, these issues revolve around a struggle for who will control the information context for society.
- Wider access to algorithmic tools could cause them to be used beyond marketing and politics to persuade the public on a variety of non-partisan social issues.
- People disconnected from social media tracking—through either non-use or cookie blocking—will become an increasingly important variable in politics and elections.
- Widespread use of algorithmic targeting will increase public interest in online privacy and drive adoption of anti-tracking technologies.

## Key Uncertainties

*Consumer willingness to trade privacy for free online services and content*



*Balance of free speech rights versus the preservation of democratic discourse*



*Continuing dominance of Google and Facebook in internet media and advertising*



*Potential for government regulation of search and social media algorithms*



## Supporting Trends

- **Algorithmic manipulation effects.** Researchers have found that subtle changes to the ranking of search engine results can have significant—and hard-to-detect—impacts on public political preferences.
- **Algorithmic microtargeting.** Social media platforms can increasingly deliver customized and personalized marketing appeals.
- **Big data and marketing.** More effective use of big data will support a wide variety of new marketing capabilities.
- **Predictive analytics.** Predictive analytics uses techniques from statistics, data mining, and machine learning to identify patterns in datasets.
- **Algorithmic discrimination.** Widespread use of data analytics may lead to data-based discrimination.
- **Regulators targeting big tech.** Regulators in the EU, Asia, and the United States are heightening regulation of the world's tech titans.
- **Big tech backlash.** A backlash is growing against the market dominance of major tech firms, including Google, Amazon, and Facebook.

### Related Drivers of Change

- Dark Data Comes to Light
- Taming Big Tech Dependency
- Nichification
- Ethical Edge of Innovation

## Notable Data Points

### AD DISCLOSURE IMPACTS

Consumers informed that an ad was targeted through algorithmic profiling were **24% less likely to be interested in a product** than consumers who were not given the disclosure.

*Source: The Intercept*

### SEARCH ENGINE MANIPULATION

Researchers found that **support for a candidate shifted by more than 20%** as a result of tweaks to rankings in search results and newsfeeds.

*Source: American Institute for Behavioral Research and Technology*

### NEGATIVE APPEAL

Search suggestions with **negative phrases can attract 10-15 times more clicks** than neutral or positive terms.

*Source: American Institute for Behavioral Research and Technology*



## Strategic Insights

- Ubiquitous use of algorithmic targeting online may create a “persuasion ecosystem” through which everyone online—including associations—has to operate. Even associations that resist such technologies will have their messaging subjected to algorithmic scrutiny and analysis.
- Algorithmic tools could be used for persuasion in associations’ internal politics and generate contention among members.
- Microtargeted messaging can be used to mobilize association members and persuade them on a wide variety of non-partisan issues. Despite the potential effectiveness of such techniques, their use may involve delicate ethical issues.
- Social media microtargeting could play a positive role in improving member recruitment, especially in targeting new members from underrepresented communities.
- Ubiquitous use of microtargeting could make association members more appreciative of content that is genuine and authentic rather than perfectly machined. Highlighting the individual voices of both members and leaders within an association could add personality to communications and provide differentiation from clickbait content.

### Timing

- **Stage:** Emergence
- **Speed:** Medium

### Potential Alternative Futures

- **Persuasion ecosystems:** Algorithmic tools become pervasive, and increasingly useful and effective, blurring the lines between helpfulness and manipulation.
- **Algorithms of discrimination:** Regulators escalate their crackdown on microtargeting practices on the grounds that such practices implicitly discriminate against minority groups.
- **The new authenticity:** Consumers increasingly reject clickbait attention strategies and gravitate to more authentic forms of content.
- **Algorithmic transparency:** Governments force internet and social media companies to disclose their proprietary search and content-promotion algorithms.





## Take Action

- **Engage in app-based activism.** With easy, mobile access to rapid-response apps, associations can transform their grassroots lobbying. This capability opens the doors for small associations that lack the budget for traditional lobbying to play big and engage members in government relations at the touch of their thumbs. Associations can use algorithmic microtargeting to mobilize and connect members with specific interests to their policy makers.
- **Incorporate sentiment analysis into policy decisions.** Public and member opinions can be analyzed in social media to inform policy positions. Social media also acts as an early warning system to alert association leaders to dissenters and complainers, although this awareness could encourage over-reacting to a few outspoken members.
- **Become the fact-checker for fast-moving issues.** With the profusion of multiple channels of information and misinformation, associations can claim a larger role as the nonpartisan interpreter of the implications and consequences of public policy decisions. To combat misinformation at the speed of algorithmic politics, associations need clear positions, solid research, and rapid communication channels.
- **Teach the power of authenticity in persuasion.** If the public and decision makers become numb to mass-generated feedback, people with personal relationships and powerful stories to share will still have the influence they have always enjoyed.
- **Explore social media microtargeting to get out the vote in association elections.** Most associations are dissatisfied with member participation in officer and board elections. Also recognize that candidates can use this same capability to shape election outcomes.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *microtargeting, cluster analysis, A/B testing, big data, big data analytics, data mining, predictive analytics, filter bubbles, search engine manipulation effect, psychographics, psychometrics, personal data, privacy, political polarization, search suggestion effect*

### Who Will Be Affected

Any organization or business with a stake in public policy needs to understand the capabilities powering algorithmic politics and discover how these tools can be used to amplify their positions and disrupt public debates. The ease of app-based activism is increasing public participation in local, state, and national affairs.

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# American Inequality

**SUMMARY:** Inequality in America is growing worse, though there are scattered signs of progress. Since the 1970s, income inequality and the share of wealth in the hands of the most advantaged 1 percent of Americans have been rising, though poverty has declined. Americans face a widening opportunity gap as a function of socioeconomic status, as well as significant racial, ethnic, and socioeconomic gaps in primary, secondary, and postsecondary education—though some of these gaps are shrinking.

## Forecasts

- In the absence of any discontinuous change, inequality will widen. Already, workers' share of national income has fallen and the middle class is shrinking.
- Workplace automation could exacerbate inequality issues.
- Failure to invest in the education and development of children and youth will have a negative impact on healthcare costs, criminal justice costs, and the quality of the future U.S. workforce.
- Shrinking of the middle class could leave many young Americans overeducated and underemployed as job opportunities dry up.
- Grim economic experiences, and prospects, may significantly shape the worldviews of many millennials as they move into new life stages.

## Key Uncertainties

*Global and national economic conditions*

•

*Political conditions and responses*

•

*Point at which growing inequality reaches a tipping point beyond which it leads to social unrest, rising crime, young people giving up on the economic system, or large-scale emigration*

•

*Changing conceptions of success as the economic reality becomes increasingly difficult for many*



## Supporting Trends

- **U.S. income inequality rising.** U.S. income inequality has been rising since the mid-1970s.
- **Inequality of opportunity rising in the United States.** Studies have documented widening gaps in opportunity for U.S. children as a function of socioeconomic status.
- **Inequality in U.S. primary and secondary education.** School readiness and school achievement gaps between different racial, ethnic, or socioeconomic groups are improving slowly, though significant gaps remain.
- **U.S. poverty flat or declining.** According to new measures, poverty in the United States has declined since about 1970, though the rate of decline may have slowed since the turn of the century.
- **U.S. social mobility unchanged.** Social mobility in the United States has remained stable for several decades.
- **U.S. wealth concentration rising.** The share of wealth in the hands of the most advantaged 1 percent of Americans has been rising since the late 1970s.
- **Shrinking American middle class.** The share of people in middle-income households has decreased to 50 percent of Americans.
- **Decline in labor's share of income.** The share of U.S. national income going to workers has been declining since 2001.

### Related Drivers of Change

- The Splintered Society
- Automating Work
- Work Redefined
- Bifurcated Workforce
- Human-Machine Cooperation
- The Stagnation Economy

## Notable Data Points

### INCOME INEQUALITY

In 2013, some **48% of income** after taxes and transfers went to the **top fifth of U.S. earners**, while 6% went to the bottom fifth.

*Source: Congressional Budget Office*

### POVERTY

A consumption-based poverty measure introduced by researchers at the universities of Chicago and Notre Dame shows a steady **decline in U.S. poverty** from 1972 (16.4%) through 2010 (4.5%).

*Source: Journal of Economic Perspectives*

### SOCIAL IMMOBILITY

According to a Pew study, a child born into a family with income in the lowest quintile has a 43% chance of remaining in that quintile as an adult but **only a 4% chance** of reaching the top quintile.

*Source: The Pew Charitable Trusts*



## Strategic Insights

- Constricted educational and economic opportunity for many Americans will affect many association members, the economic sectors in which those members work, and the customers (or clients, patients, students, etc.) that those members serve.
- Associations will have an opportunity to help members understand and respond to new economic realities and to offer new kinds of support services for affected members.
- Child and youth education, training, and development will be important targets for association philanthropy, helping to ensure that the United States maintains a strong workforce and all Americans have the opportunity to participate.
- Similarly, addressing inequality could be an important goal of association advocacy efforts—in some cases addressing the root causes of which other issues (e.g., a shortage of qualified workers) are symptoms.
- In one possible future, some member organizations will rely on a small number of elite staff to drive business innovation, while a much larger number of traditional, temporary, and freelance employees carry out more routine duties. Associations may need to serve these two tiers of workers differently.

### Timing

- **Stage:** Growth, including for gaps in wealth, income, and opportunity
- **Speed:** Moderate, persisting over decades

### Potential Alternative Futures

- **Discontinuous change:** Effective, deep policy interventions gradually begin to narrow the inequality gap and promote social mobility.
- **Political break and realignment:** Frustration with lack of economic opportunity causes an irreversible fracture of one or both political parties, eventually opening a path to needed reforms.
- **Resetting expectations:** After several decades of economic stagnation, more Americans reset their expectations, taking pride in small houses, thrift shop purchases, and frugality, no longer aspiring to the lifestyles of the wealthy.



## Take Action

- **Answer this grand challenge for associations.** Associations can create opportunity and contribute to the stability of society in many areas: education, workforce development, healthcare, youth development, and so forth. This challenge is greater than any one association, and action will require convening broad-based stakeholders to create collaborative solutions. Find partners that want to work toward social justice in your sphere of influence. Some foundations may share your concern and be willing partners in underwriting your efforts.
- **Use research to inform solutions.** Before your leaders head off with good intentions, ground your efforts in research. These are long-term and often structural problems. Do the serious research to understand your challenges. Social scientists have been studying inequality for many years. Once you choose a strategy or initiative, commit to regular program evaluation to assess impact and make course corrections.
- **Foster upward mobility.** Associations have an array of tools they can use to advance diversity and inclusion for their members, including education and training, mentoring, and leadership development opportunities. Look closely at who these programs are serving and encourage inclusive participation.
- **Address your own barriers to access and opportunity.** Are there inherent barriers to accessing the knowledge and business and professional opportunities your association offers? What steps can you take to mitigate these? You might provide critical content at no or low cost, offer tiered pricing for dues and programs, and offer scholarships and fellowships to provide access to learning opportunities. What kind of intentional outreach can you make to underserved and underrepresented individuals?

## Keyword Search

To continue researching this change driver, use these search terms:

*income inequality, economic inequality, Gini index, income gap, Thomas Piketty, socioeconomic gaps, income gap, wage inequality, CEO pay gap, wealth inequality, recession, automation, jobs, unemployment, race*

### Who Will Be Affected

Every association and organization with a stake in the future stability of civil society will need to join in addressing inequality. This is a great opportunity for associations and their business partners to demonstrate the leadership this sector can bring to a societal challenge.

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# Declining Trust

**SUMMARY:** In the United States, trust in institutions—including government, media, science, and medicine—is falling, with important social, political, and economic implications. This decline in trust could fuel deeper political polarization and further erode social cohesion.

## Forecasts

- Growing trust deficits in many areas of American life are creating a need for a rebuilding of trust systems. Fact-checkers—Snopes, PolitiFact, etc.—are early examples of this. Efforts to enhance reproducibility in science are another example.
- As the understanding of filter bubbles, targeted marketing, and “fake news” grows, more people could begin seeking out better information. This response is likely to vary by socio-political segment, however.
- Low trust in institutions of all kinds feeds political populism. If trust continues to decline, more populist political movements could find traction.
- New technologies—realistic fake video and audio and AI—will have further corrosive effects on trust.

## Key Uncertainties

*Evolution of trust in institutions within various political and cultural groups*

•

*Societal capacity and methods for rebuilding trust*

•

*The role of filter bubbles and misinformation*

•

*Potential rise of new trusted institutions and knowledge sources*

•

*Evolution of technical means to obscure or fake reality and manipulate people’s perceptions*





## Supporting Trends

- **Declining trust in government.** Americans trust in their government is at historically low levels. This seems to be the case across all demographic groups—racial, political, and generational.
- **Erosion of trust in the media.** Americans trust in mainstream media is at an all-time low. This is driven by the general decline of trust in American institutions, perceptions of arrogance, the rise of alternative sources on the internet, and political polarization.
- **Faking reality.** Technologies for creating convincing fake audio and video are advancing rapidly.
- **Millennials' mistrust of institutions.** Millennials share the overwhelming mistrust of Americans toward government—and this generation also distrusts most other institutions.
- **Trust in science may be waning.** Scientists perceive that public trust in science is diminishing and, indeed, a recent poll shows some loss of optimism about science, though science is still well-respected.
- **Findings of irreproducible science sparking reforms.** A number of studies suggest that a significant proportion of published science may not be reproducible; these results are sparking a variety of reforms.

### Related Drivers of Change

- Rejection of Expertise
- Algorithmic Politics
- The Splintered Society
- Nichification

## Notable Data Points

### CRATERING OF TRUST

Americans' trust in four major institutions of public life—NGOs, media, business, and government—**dropped 37 points between 2017 and 2018.**

*Source: Edelman Trust Barometer 2018*

### DECLINING TRUST IN GOVERNMENT

The share of Americans who say they **trust the federal government** to do the right thing always or most of the time **declined from 77% in 1964 to 18% in 2007.**

*Source: Pew Research Center*

### AMERICANS BAD AT FACT-SPOTTING

Only 26% of surveyed Americans **could identify five out of five factual statements.**

*Source: Pew Research Center*



## Strategic Insights

- Being trusted will be a growing advantage for organizations. High trust is increasing the upside to being seen as relatively neutral, or at least well aligned with the interests and beliefs of members.
- A growing challenge will be that forces beyond its control could shape an organization's perceived trustworthiness. For instance, a perception of taking a side in a social or political debate could trigger attacks on an organization's credibility, even if the organization did nothing untrustworthy.
- Decline of trust will have an impact on donations and fundraising, as organizations have to make a larger effort to convince donors of their integrity.
- Similarly, this will affect lobbying efforts as the motives and ties of organizations are subject to increasing suspicion, and stances on issues are taken as proof of untrustworthiness.
- Transparency can be a means of gaining trust—but it can also be a double-edged sword, providing information upon which doubt can be hung.
- Trust in institutions is even lower in much of the world outside the United States and European Union, especially in emerging markets. When engaging with people and organizations in these places, a basic level of knowledge of how institutions are perceived will help prevent miscues and missteps.

### Timing

- **Stage:** Growth, with driving forces still active
- **Speed:** Slow, as trust has relatively deep sociocultural roots

### Potential Alternative Futures

- **Post-trust world:** In a post-trust world, nothing is deemed "inherently" true.
- **New structures of trust:** New institutions and systems to support trust are built up, though they may have divided audiences.
- **A million bubbles of one:** As targeted marketing and alternative sources proliferate, filter bubbles could be further refined to single users.
- **Radical transparency:** In a post-trust world, everyone knows everything about everyone. This creates a level playing field of knowledge—but has its own pernicious effects.



## Take Action

- **Communicate with care, and be prepared with a crisis communications plan.** How an association communicates has never mattered more now that social media and multiple channels rapidly spread messages to multiple audiences—often without adequate context. People expect prompt response to questions. A crisis communications plan is critical to quick recovery from inevitable missteps.
- **Take these practical steps to build trust:**
  - Have clear and transparent decision-making processes especially with boards, delegate assemblies, and sensitive committees such as government affairs and nominations.
  - Give credit to members who help develop programs or make key decisions. Members trust colleagues.
  - When setting priorities, back up decisions with data and evidence that all voices were heard.
  - Commit to a strategic direction and goals that transcend leadership transitions.
- **Know when you must take a stand and when it is wise to be silent.** Be clear on your values and positions. Be vocal where it matters; don't take positions where members don't want or need you to weigh in.
- **Manage the perception that money can buy influence.** Associations depend on financial support from business partners and sponsors. It's more than money: Companies do content marketing, conduct research, and provide expert speakers. To help members assess how reliable these resources are, disclose the rationale or research behind any guidance or research conclusions, and their funding sources.
- **Know where your members stand within the public trust.** Check public opinion surveys and trust barometers to understand how the public perceives your industry, profession, or cause. Keep a sense of perspective; with distrust widespread, where you stand is relative. Decide how you will censure errant members.
- **Lead in rebuilding public trust.** Associations are the interface between their members and government and society. Strive to be a trusted voice and source.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *trust, polling, polarization, institutions, partisanship, media filters, media bubbles, social segmentation, diversity, filter bubble, deep fakes*

### Who Will Be Affected

Because people give to organizations they trust, philanthropic and charitable organizations are particularly vulnerable. The public has varying degrees of trust in different industries and professions; associations should know where their members stand in public perception.

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# Ethical Consumption

**SUMMARY:** Younger U.S. consumers are engaging in more “ethical” and values-driven spending on products and services, and investing in companies seen as doing good. The values and demographic weight of the millennial generation suggest that this trend will grow.

## Forecasts

- As tools—apps, sensors, data analytics—to guide consumer behaviors along ethical lines proliferate, ethical consumption will be a primary screen or filter for more purchasing and spending decisions.
- From Tesla to renewable energy generation to ethical supply chains, the ethical economy will drive innovation in consumer-facing products and services as companies seek to capture ethical dollars.
- Who or what is ethical will remain highly debated in an increasingly polarized society.
- Publicly trumpeting ethical positions can make ethical issues go viral faster, and organizations and companies will run a higher risk of being publicly called out, shamed, or boycotted when consumers perceive a breach of stated ethics.



## Key Uncertainties

*Evolution of consumer values  
over life stages*

•

*Evolution of environmental issues*

•

*Size of ethical market*

•

*Effects of political polarization  
on consumer values and choices*

•

*Economic conditions*

•

*Consumer choice fatigue*

•

*Related standards and certifications*



## Supporting Trends

- **The ethical economy.** Younger U.S. consumers tend to spend based on ethical issues and values. Younger millennials seem to be even more values-driven than older ones, suggesting that the trend could continue to gain strength as younger millennials mature.
- **Impact investing.** Investing to promote social, environmental, or governance benefits as well as financial returns—also known as impact investing—has been growing substantially, reaching \$36 billion globally in 2015 from around \$26 billion in 2013.
- **Politicized commerce.** Political polarization is spilling over into commerce, with companies increasingly taking sides on divisive political issues. Companies can be drawn into controversies unwillingly as consumers on different sides of a political issue demand they take a stand, or because their products or services suddenly take on political meaning.
- **Consumer spending shift.** American consumers are spending less on goods such as clothing and electronics and more on services like entertainment, travel, and healthcare.
- **Ethics and transparency.** Ubiquitous connectivity and information-capture, new sensing capabilities, and pervasive social media are boosting corporate transparency, raising significant challenges to corporations' reputation and risk management strategies.
- **Millennials: the most liberal generation.** Millennials' liberal values may be a lasting generational trait, not merely youthful idealism.

### Related Drivers of Change

- Transparent Organizational Ethics
- The Sharing Economy
- The Splintered Society
- Decline in Trust

## Notable Data Points

### ETHICAL CONSUMPTION

70% of millennials say their  
**personal values are  
“the driving force behind  
their decision-making.”**

*Source: Deloitte*

### MILLENNIALS MORE LIBERAL

Pew Research Center has  
**consistently found  
that millennials  
(people age 20-36 in 2017) are  
“considerably more  
liberal”**  
than all other living U.S. generations.

*Source: Pew Research Center*



## Strategic Insights

- As organizations representing industry sectors or interests, associations are well-positioned to act as developers and arbiters of ethical standards for their industries and membership.
- More associations will be buffeted by consumer and member demands to develop and promote explicit organizational ethics.
- Work on organizational and industry ethics could exacerbate tensions within organizations about what constitutes ethics and when and how organizations should be involved or take stands.
- Promoting ethical positions leaves organizations open to critiques by those who hold different positions, and by supporters who are policing the organization for lack of compliance. Associations that do make ethical positions explicit will need to be prepared to defend them against critics.
- If associations do not work to define the ethics involved in their industry, they will be left to work within guidelines developed by others—e.g., consumer groups or regulators—that may be harmful or restrictive.

### Timing

- **Stage:** Growth, from a relatively small base
- **Speed:** Slow, as the trend is driven by values

### Potential Alternative Futures

- **It's too much work:** Having to keep straight which products and services qualify as ethical and which should be rejected proves too much of a hassle for consumers—in part because of proliferating guides to ethical purchasing.
- **Profusion of systems:** The proliferation of standard-setting organizations and standards creates confusion and undermines consumer confidence in any system.
- **Dollar activism:** Slashed environmental regulations boost ethical buying, as consumers seek to offset damage and take a stand via market forces.





## Take Action

- **Promote the nonprofit advantage.** In a competitive marketplace, associations can promote their nonprofit commitment to delivering unbiased products and services that the community has collectively developed to advance their common good.
- **Take the lead in defining what ethical consumption is.** Many associations can help members and consumers sort out the different issues and options in their field of influence. Associations can clarify the labels and terms and, where appropriate, establish standards for their use. Some nonprofits and advocacy organizations may choose to issue scorecards to guide consumers to supportive businesses and organizations. Where consumers are experiencing choice fatigue, associations can help clarify priorities.
- **Review your values and code of ethics.** If these statements are silent on issues of ethical consumption, consider how they might be updated to respond to changing public expectations.
- **Choose partners and vendors that reflect well on you.** If you are working with or recommending companies and other business partners, members may assume your association has vetted not just their abilities but also their values and beliefs. Be clear about what is permissible in capitalizing on these relationships.
- **Practice ethical consumption in your meetings.** In a politically volatile environment, meeting locations can conflict with changing social and political values. Meetings do affect environmental resources from energy to travel to consumables to food. Decide which ethical choices your association must model in how you run your meetings.
- **Consider a socially responsible investment policy.** You might, for example, identify business sectors in which your association will not invest its funds. Recognize that ethical choices could affect your potential returns.

## Keyword Search

To continue researching this change driver, use these search terms:

*values, shopping, consumer values, ethical shopping, organic products, sustainability, climate change, retail, green products, values-based economy, triple bottom line, fair trade, polarization*

### Who Will Be Affected

Organizations that have a high level of public and consumer interface may be expected to help define and promote ethical consumption. Professional associations with enforceable codes of ethics and credentialing organizations may be able to differentiate their members and credential holders as ethically responsible. Philanthropic and charitable organizations may be held to higher standards for socially responsible behaviors.

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# Ethical Edge of Innovation

**SUMMARY:** Fast-moving technological innovation is outpacing the legal and regulatory structures designed to protect public safety, promote business and trade, and foster ethical practices. While new technologies often roll out ahead of laws, in the coming decade the public pressure to curb unintended consequences will intensify.

## Forecasts

- Differing views on the role of technology and regulation in society will lead to a spectrum of laws and regulations in different regions of the world, with variations governed by factors such as views of privacy, bioethics, and free speech. Some countries may surge ahead of others due to looser regulatory environments—for instance, China and CRISPR-based genetic modification.
- There could be resurgent consumer interest in government regulation in the face of transformative but alarming technologies, such as self-driving vehicles and pervasive user tracking and profiling.
- Wider adoption of artificial intelligence—and the black-box algorithms that often power it—will make questions around tech adoption and control relevant to many organizations.
- The nature of free speech online will be worked out in the 2020s: what is allowable, who controls speech, and whether social media and its platforms constitute public forums.



## Key Uncertainties

*Speed of adoption of these technologies, including AI systems*

• *Attitudes toward online vs. “real-life” actions and goods (e.g., cyber-bullying, theft of online goods)*

• *Definitions of algorithmic bias*

• *Tolerance for “black-box” algorithms*

• *Nature of regulation of technology platforms, for instance as utilities*

• *Harmonization of international rules governing technology*

• *Consumer desire for technological innovation vs. demand for regulation*



## Supporting Trends

- **Ethical algorithms.** Attention to ethical problems in artificial intelligence is rising.
- **Faking reality.** Technologies for creating convincing fake audio and video are advancing rapidly, leading to worries about how to determine real from fake.
- **CRISPR gene editing.** The CRISPR technique for making precise changes to DNA is moving into both more basic-research applications and therapeutic use.
- **Data-trail control.** People are generating vast data trails of personal information, leading to growing questions about who should own and control that data.
- **Algorithmic sexism.** Besides threatening more women's jobs than men's, work automation risks infusing gender biases throughout society's core systems.
- **Regulators targeting big tech.** Concerned about negative network effects, regulators in the EU, Asia, and the United States are heightening regulation of the activities of the world's tech titans.
- **Criminal use of blockchain.** Blockchain is being used in criminal activities ranging from identity theft to drug trafficking, money laundering, and phishing.
- **The right to repair.** Laws about intellectual property and the "right to repair" one's possessions are shifting as products become more reliant on proprietary software.

### Related Drivers of Change

- Fast Data
- Fraying Cybersecurity
- Who Owns the Data?
- Reining in Big Tech

## Notable Data Points

### HIGH COST OF CYBERCRIME

From 2011-2017,  
**Americans lost more than \$100 billion to identity theft,**  
though only 25% of identify thefts  
are reported to police.

*Source: Nick Selby, "Local police don't go after most cybercriminals. We need better training." The Washington Post, April 21, 2017.*

### AI AND FAKERY

China's Baidu Deep Voice AI can reproduce  
and manipulate a person's voice,  
even changing its gender and accent.  
**Apps such as FakeApp  
can create seamlessly  
realistic video footage**  
and have been used to insert people's faces  
onto pornographic content.

*Source: Tristan Green, "Baidu's voice cloning AI can swap genders and remove accents." The Next Web, February 26, 2018. Kevin Roose, "Here Come the Fake Videos, Too." The New York Times, March 4, 2018.*

### NEW TECH, NEW CRIMES

A 2018 attack on the city of Atlanta  
will cost the city more than  
**\$2.5 million to clean up.**

*Source: Aaron Diamant, "Ransomware attack cost city \$2.7 million, records show." <https://www.wsbtv.com/news/local/atlanta/ransomware-attack-cost-city-27-million-records-show/730813530>*



## Strategic Insights

- Due to a range of factors—government inaction, consumer eagerness, speed of technological innovations and deployment—there will be a sizeable gap between the commercialization of technology and the creation of rules about its use. Associations and their industry members have an opportunity to fill in these gaps by developing best practices and acceptable rules for tech adoption and use. Associations can also help organizations head off unwanted regulation and get ahead of issues, including corporate social responsibility issues.
- Besides the opportunity to fill in regulatory gaps, associations will have the opportunity to shape new laws and regulations in multiple areas of technology, allowing leaders to suggest acceptable fixes.
- Care will be needed when operating in technological fringe areas as public outrage following a tech-driven incident can damage an organization's reputation—even when no law has been broken.
- Associations are scattered across the spectrum from cutting edge to late adopters in dealing with the legalities of technology, creating an opportunity to transfer knowledge from leaders to laggards.
- Algorithmic-enhanced HR analytics are advancing. The black-box nature of many HR algorithms may leave organizations open to charges of discrimination, even when they had no such intent.

### Timing

- **Stage:** Inherently emergent.
- **Speed:** This change is rapid, as it is driven by rapidly advancing IT.

### Potential Alternative Futures

- **A shorter leash:** Regulation ramps up in the face of multiple technological and sociopolitical issues.
- **Rise of “ethical tech”:** Technology companies seeking to get ahead of stronger regulation subscribe to publicly known codes of ethics. Adherence to these codes becomes a competitive mandate.
- **Fake everything:** The application of advanced technologies such as AI to fake video and audio dramatically exacerbates the fake news problem. Everything is considered fake unless verified by a trusted source.



## Take Action

- **Lead the way forward in legal and ethical practice.** Association leaders will need to anticipate the implications of new technologies and be at the forefront of defining and advocating for laws and business practices that protect the reputations of the many from the misdeeds of the few.
- **Stay true to your purpose to navigate unsettled issues.** Depending on your association's purpose and your members' interests, you may be more or less ready to expose problems and seek solutions. If your association serves a public purpose, you may be compelled to step into the breach on unsettled law. Associations serving business interests may choose to keep their deliberations out of the spotlight until they settle on a course of action.
- **Create the first drafts for laws and regs.** Standard-setting and credentialing organizations often create the framework on which laws and regulations are later built. Some states, like California and Massachusetts, tend to be first to respond with new laws. Work with chapters and local partners in these states to get these precedent-setting laws right.
- **Embrace ethics to minimize harm.** Help your members rely on ethics as a guide where legal precedent does not clarify gray areas. Look to other industries for parallel developments that could offer insights into how your members might respond to similar situations in their world.
- **Rely on a diversity of perspectives for deeper understanding.** You'll never regret involving diversity in any project, especially for innovations where consequences may be difficult to anticipate. You may need technical and legal expertise as well as the perspectives of affected stakeholders. Innovations can be created for one purpose and, once they are adapted or commercialized for other purposes, lead to alarming consequences.

## Keyword Search

To continue researching this change driver, use combinations of these search terms:

*technology, law, ethics, biotechnology, bioethics, deep fakes, algorithms, AI, artificial intelligence, blockchain, algorithmic bias, algorithmic discrimination, ethical technology, privacy, regulation*

### Who Will Be Affected

Associations representing professionals and companies in scientific, engineering, computing, and biotech and biomedical fields are at the forefront of this issue. Associations and nonprofits whose mission relates to public health and safety will be drawn into the frontlines of these public debates. Any field where disruptive innovation is occurring will experience legal and ethical gaps between what is possible and what people agree is acceptable.

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# Shifting Terrain for Advocacy

**SUMMARY:** In the United States, single-party control of the executive and legislative branches, shifting power between Congress and regulators, and conflicts among federal, state, and local governments will change the nature of policymaking. National-level gridlock will drive more efforts at policy change toward state and city governments. All of this will change the arena in which advocacy occurs.

## Forecasts

- Sharp political disagreements over the locus and nature of regulation mean that American regulatory policy could whipsaw in the 2017-2021 period and beyond, as party control of Congress, the executive branch, and state legislatures changes.
- To the extent that national government is gridlocked, more efforts at policy change will devolve to states and cities.
- Devolution will also create new power centers, accentuating the role of certain states or even cities, or groupings of such. These centers will lead or shape certain issues, as California, Texas, or New York City have in the past.
- Cities will attempt to enact policies, sometimes in concert with each other, but will often be thwarted by preemption from their more conservative state legislatures.

## Key Uncertainties

*Political direction of the United States 2018-2020*

•

*Evolution of the U.S. political system over the medium term*

•

*Changes to rules for lobbying, advocacy, and political contributions*

•

*Nature and course of the political struggles between different levels of American government*

•

*Ability of states to make policy at odds with federal policy, and of cities to defy their home states*

•

*Success of efforts to combat political gerrymandering*





## Supporting Trends

- **Cities versus states versus feds.** In the United States, political conflict is increasingly played out in battles between levels of government.
- **Renewed focus on Congressional lobbying.** Lobbying efforts will shift from regulatory agencies back to Congress beginning in 2017.
- **Changing regulation.** The U.S. approach to regulation is likely to shift in the next few years. The unified Republican government that came into office in 2017 is set on reducing regulation, especially regulations promulgated by the Obama administration.
- **Congressional say on regulation.** Congress is likely to take a greater role in U.S. regulatory processes.
- **Partisanship more bitter.** The partisan divide among U.S. voters is sharper and more bitter than in decades.
- **Declining trust in government.** Americans' trust in their government is at historically low levels.
- **Millennials' mistrust of institutions.** Millennials mistrust many large institutions, including institutions of government.
- **Illiberal democracy.** Several Western countries have begun to backslide on their embrace of liberal democratic political order.

### Related Drivers of Change

- The Splintered Society
- American Inequality
- Declining Trust
- Immigration-Driven Demography

## Notable Data Points

### OVERRULING CITIES

In 2016,  
**36 states passed laws to preempt city laws**  
that the state legislatures disagreed with.

Source: Center for Media and Democracy

### HIGH-OUTPUT, LOW-OUTPUT

Donald Trump won 85% of U.S. counties in the 2016 election, but  
**these counties produce only 36% of U.S. GDP.**

Clinton's 472 counties produce 64% of U.S. economic output.

Source: The Brookings Institute

### CITIES AGAINST CLIMATE CHANGE

**Twenty U.S. cities have created the City Energy Project**  
to fight climate change regardless of national-level policies.

Source: City Energy Project



## Strategic Insights

- Fragmented policymaking may in some instances offer new opportunities for association influence, though it will sometimes be on smaller than national scales.
- Policymaking in an environment of devolved power may elevate the role of sub-national chapters of associations as well as of dispersed members. Local chapters and members may be more trusted and oriented to local politics and sensibilities, and thus more effective.
- This vertically and horizontally fragmented, contentious policymaking environment will affect funding for research, education, and some kinds of subsidies and investment. In some cases, states may want to step in when the federal government is unable or unwilling to act.
- Battles between different levels of government may create legal complexities for associations and their members, as in state-local conflicts over LGBT rights or federal-state divides on marijuana policy.
- Associations will face delicate issues as they attempt to collaborate on policy with one level of government that may be at odds with or in defiance of the level above or below it.

### Timing

- **Stage:** Emergent and possibly discontinuous change
- **Speed:** Faster, as U.S. politics has become less stable

### Potential Alternative Futures

- **Regulated regulators:** Conservative efforts to constrain the regulatory state stick, creating a new environment in which Congress is much more prominent.
- **Radical moderation:** Frustration at a gridlocked and ineffective political system drives voters toward moderate politicians, including some outside of the two-party system.
- **Political realignment:** The two-party system realigns along new dimensions, such as populism versus globalism.
- **Lobbying crackdown:** Restrictions on political contributions and lobbying are renewed, perhaps from a populist angle.



## Take Action

- **Shift time and resources into advocacy.** U.S. associations that have had limited public affairs and government relations efforts now face great pressure to make advocacy a priority, whether it's promoting the profession or industry, lobbying on critical issues, or defending against harmful legislation and regulations. Sometimes the issues are narrow yet critical, like licensing and taxation.
- **Over-communicate your role and positions.** In a splintered society, you have to be even clearer and more assertive about your ethical values and the positions that matter to your members. With volatile and rapid news cycles, you have to be prepared to continuously communicate your actions.
- **Create channels for dissent.** Expect to be challenged on your association's right to speak for all members and stakeholders. Give dissenters a constructive way to be heard and feel welcomed as members.
- **Look to local affiliates for leadership.** With local governments taking different positions on national policy, especially social justice issues, many national associations will need to prioritize state and local politics. They need local people and resources to take the lead. Associations also face new risks as state and local governments take positions that restrict where it is acceptable to meet.
- **Review your involvement in alliances and coalitions.** It may be time to reassess longstanding advocacy partnerships where mission creep or new positions no longer may align with those of your association. New partnerships may become more important in this shifting issues terrain.

## Keyword Search

To continue researching this change driver, use these search terms:

*politics, Congress, regulation, states, government, cities, C40 cities, paradiplomacy, blue cities, preemption laws, immigration, sanctuary, climate change, state nullification, federal supremacy, SLAPP lawsuits*

### Who Will Be Affected

Professional associations and nonprofits that once downplayed advocacy are now expected to engage. Trade associations are at risk of splintering or losing members as issues shift. Local affiliates are becoming key, as local and state governments assert their rights to set public policy. Global organizations will be tempted to over-emphasize U.S. politics and get on the defensive when these public policies generate international opposition.

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# The Splintered Society

**SUMMARY:** Americans are self-segregating along multiple divides, both online and offline: politics, economic status, educational attainment, social life, consumer spending, media choices, and geography. This is being fueled as much by political polarization as by economic and social inequality.

## Forecasts

- Political polarization could be exacerbated as more issues are labeled partisan or assigned to a particular divide. This could strengthen segregation and filter bubbles and increase their effects—shaping even more whom people socialize with and where they live, among other factors.
- A splintered society will drive social instability and insecurity, as it is the result of corrosive processes that undermine existing institutions and social structures.
- As people self-segregate into like-minded communities, or around shared ideas, it could spark the rise of new social, commercial, and civic institutions that partially duplicate existing institutions but better mirror the ideas and values of their supporters and users.
- As splintering spreads, the danger of people further disengaging from political and social institutions is rising due to lack of trust or a failure to believe in efficacy.

## Key Uncertainties

*Whether some kind of breaking point will occur*

•

*The potential for restoration of trust in media*

•

*Varying levels of trust decline across different institutions and social groups*

•

*Potential for re-engagement in shared civic discourse*

•

*The speed at which polarization grows*

•

*Effects of a potential external unifying event, such as war or terror attack*





## Supporting Trends

- **The politicization of American lifestyles.** Americans' political values are shaping their lifestyle choices.
- **Millennials the most liberal generation.** Pew Research Center has consistently found that millennials (people age 20–36 in 2017) are “considerably more liberal” than all other living U.S. generations. These liberal values may be a lasting generational trait, not merely youthful idealism.
- **Politicized commerce.** Political polarization is spilling over into commerce, with companies increasingly taking sides on divisive political issues.
- **Partisanship more bitter.** The partisan divide among U.S. voters is sharper and more bitter than in decades.
- **“Alt tech” social media.** American political polarization is affecting technology with the rise of an “alt tech” ecosystem that is creating alternatives to popular social-media platforms.
- **Political polarization and class.** In the United States, political polarization between the college-educated and those with a high school degree is becoming more extreme.
- **Algorithmic manipulation effects.** Researchers have found that subtle changes to the ranking of search engine results can have significant—and hard-to-detect—impacts on public political preferences.
- **Job polarization.** High-skill and low-skill jobs are growing, while middle-skill jobs decline.

### Related Drivers of Change

- Declining Trust
- Ethical Consumption
- Rejection of Expertise
- Reputation by the Numbers

## Notable Data Points

### JOB POLARIZATION

Between 2007 and 2014,  
**high-skill occupations**  
**grew at 1.2 % per year,**  
middle-skill occupations  
declined by 1.3% per year,  
and **low-skill occupations**  
**grew an average of**  
**1% per year.**

*Source: Federal Reserve Bank of St. Louis,  
Economic Synopses*

### PARTISANSHIP GROWING

In 2016, for the first time since 1992, a majority of Americans in both major parties expressed not merely unfavorable, but very unfavorable, views of the other party. Moreover,  
**55% of Democrats**  
**and 49% of Republicans**  
**said they are “afraid”**  
**of the other party.**

*Source: Pew Research Center*



## Strategic Insights

- By dint of their size and purpose, associations can serve as a positive force for consensus and as a safer arena for members with differing ideas to come together to discuss and debate.
- Associations and organizations will need to be aware that more and more of the internal and external activities of associations will be viewed by some as “political” in a broad sense.
- Any issue can be infected by polarization—particularly in science and in related industries—whatever the intentions of organizations and companies. A neutral stance itself can be labeled political. Competing interests will attempt to use associations as chits in polarized battles. Sometimes associations will be forced to take sides—and sometimes this could be desirable.
- Associations will be affected by internal segregation and polarization issues, many with potential splintering effects. Associations and organizations will need to develop policies and procedures to mediate these potential splits to mitigate negative effects.
- Associations will need to be aware of the potential impacts of polarization and splintering on funding. In particular, government funding could be affected due to divergent views and seesawing policies.

### Timing

- **Stage:** Growth, though it has continued for decades
- **Speed:** Moderate, but trend and its effects are accelerating

### Potential Alternative Futures

- **Meetings in the matrix:** Personal avatars and a shared online environment re-create real-world meetings in purely digital forms.
- **The return of the “most trusted man in America”:** New media personalities arise who are able to capture viewers from multiple points of view, allowing for a rebuilding of basic civil consensus.
- **Millennials hold sway:** The size of the millennial generation and the values its members hold spark a civic renaissance.
- **Popping the bubbles:** Citizen, corporate, and journalistic efforts to counter filter bubbles pay off, raising comprehension and civility across divides.





## Take Action

- **Prepare for more intense issues management.** What political, economic, and social issues could draw you into public debate and potentially splinter your association? Prepare to act quickly: Delay and waffling only make a difficult situation worse.
- **Revisit whether staying neutral remains a viable option.** Regardless of what your governance documents require or how carefully you avoid lobbying, some members will push you to get involved in issues beyond your traditional mission. If they perceive neutrality as inaction or indifference, they may leave.
- **Strengthen your leaders' facilitation skills.** Association leaders could be naturals for leading the difficult conversations ahead in local communities and national forums. Start equipping them now with strong facilitation skills and processes that enable people to act together to create solutions.
- **Turn staff into healers of the breach.** Every point of contact among staff and members can be an opportunity to heal or do harm. Polarizing conversations also occur in the workplace. Hire for empathy and a diversity of experience and perspectives.
- **Enable self-organization to voice different perspectives.** Associations historically have enabled special interest groups to form within their ranks. Giving people the opportunity to work from within your organization may forestall the desire to find or form other associations better aligned with their views.
- **Anticipate political risk in conference site selections.** You could be only one election cycle away from potential trouble with a future conference site choice. Discuss these concerns as cause for cancellation and relocation in contracts and insurance agreements.

## Keyword Search

To continue researching this change driver, use these search terms: *political polarization, economic polarization, immigration, partisanship, media filters, media bubbles, fake news, social segmentation, cold civil war, red blue divide*

### Who Will Be Affected

Associations that represent members with a significant public interface have been the first to be drawn into issues of social, economic, and political difference—that is, education, healthcare, youth development, communications and media, entertainment. Ultimately a splintering society creates a difficult social and business climate for all organizations.

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# Transparent Organizational Ethics

**SUMMARY:** Organizations will face new kinds of scrutiny as drivers of transparency proliferate. Ubiquitous connectivity and information-capture, new sensing capabilities, and pervasive social media all enable hyper-transparency of organizations' actions, necessitating actively managing reputation in a world increasingly concerned about ethical behavior.

## Forecasts

- Growing amounts of deliberately released and emergent data will create an environment where organizations have declining control over their transparency.
- Ethical decisions in a very dynamic and polarized environment will require difficult balancing of considerations and an understanding of longer-term implications.
- Automated ethics-ratings apps, tailored to users' personal ethical beliefs and interests, will inform where individuals buy, invest, or do business.
- Consumers will show a wide range of interest in punishing and rewarding organizations for their behavior; new tools may help boost the percentage of people who engage in this behavior.



## *Key Uncertainties*

*Overall societal status of trust*

•

*Effects of competing and contradictory views of "ethical" in a polarized political climate*

•

*The nature of future activism*

•

*Evolution of regulation*

•

*Level of active consumer interest in corporate and organizational ethics*

•

*Role of fake and misleading news and information*



## Supporting Trends

- **Ethics and transparency.** Ubiquitous connectivity and information-capture, new sensing capabilities, and pervasive social media are boosting corporate transparency—raising significant challenges to corporations' reputation and risk management. This hyper-transparency will boost the degree of ethical scrutiny of organizational practices.
- **The ethical economy.** Younger U.S. consumers are pushing a trend toward more ethical and values-driven spending.
- **Impact investing.** Investing to promote social or environmental benefits as well as financial returns—also known as impact investing—has been growing substantially, reaching \$36 billion globally in 2015, up from around \$26 billion in 2013.
- **Rising corruption.** Long-running studies of corruption around the world find that corruption is widespread and rising, despite extensive efforts to combat it.
- **Power of online reviews.** Online consumer reviews are shifting power from businesses to consumers—but improved review systems are needed.
- **The push for facts.** In the face of a perceived flood of propaganda and “fake news,” there is a pro-truth counter-push.
- **Millennial doubt.** Millennials mistrust large institutions—transparency and compelling stories are more important than organizational reputation in their decision making.

### Related Drivers of Change

- Declining Trust
- Reputation by the Numbers
- Ethical Consumption

## Notable Data Points

### VALUE-BASED DECISIONS

70% of American millennials say their  
**personal values are  
the driving force**  
behind their decision-making.

Source: Deloitte

### REPUTATION COUNTS

92% of North American consumers  
**regularly read  
online reviews**  
to learn about a business.

Source: BrightLocal

### REPUTATION COUNTS

**Americans' trust  
in business was at 52%**  
as of 2017, down slightly from 2016  
and barely in the “trusted” category.

Source: Edelman, trustbarometer 2017 Annual Global Study



## Strategic Insights

- Association boards should consider the positions or responses they will take (or are taking) on current cultural issues so that their responses are well thought out and accurately represent the association and its interests.
- Associations may face greater pressure to disclose any benefits and perks that accrue to board members, staff, or volunteers as a gesture toward transparency.
- Understanding the apps and websites that will be used to evaluate the ethical standing of associations and their members is of rising importance. Associations may want to consider providing this kind of information as a service.
- All associations should have a code of ethics that provides guidance on what the association considers appropriate. Training and education on the code of ethics are also necessary.
- Associations should not be afraid to promote positive messages about their ethical behavior on social media and other news outlets, but these messages will need to be based on real and meaningful activities.
- A member survey on what positions the members support on ethical questions and what positions they want the association to take might be useful.
- Associations should expect to face more pressure to police the ethical practices of their members and should develop appropriate disciplinary policies, such as withdrawing credentialing and licensing endorsements when necessary.

### Timing

- **Stage:** Growth stage, in a period of expansion
- **Speed:** Uneven and likely to be influenced by headline events

### Potential Alternative Futures

- **Obscured transparency:** The quantity of data available about the ethics of organizations and companies overwhelms most people's ability to pay attention, and thus their ability to care or act.
- **Defensive crouch:** Ethical issues become so contentious and polarized that organizations try to avoid taking any detectable stances—which fails to satisfy culture warriors of various stripes.
- **Automated activism:** With bots increasingly used to manage people's affairs, including shopping, more are equipped with ethical filters that drive consumers' choices.
- **Lost in the data storm:** Massive volumes of data effectively obscure relevant truths about organizations.



## Take Action

- **Keep the board above-board.** Board members have a duty of loyalty that requires them to avoid conflicts of interest, protect confidential information, and act in ways that advance the association. New board member orientation and board evaluation are both critical opportunities to address ethical risks and reputation management in today's environment.
- **Spend the association's credibility and money carefully.** Have transparent and open processes for selecting board members, appointing influential volunteer leaders, and choosing speakers. Have clear criteria and fair processes for awards and grants. Follow good contracting and purchasing practices when deciding with whom to do business.
- **Live by your code of ethics.** Chances are good your volunteer leaders and members give your code of ethics little thought. In this environment, associations need to take these codes seriously. Do the words speak to the right issues and clearly delineate expectations? Is the association ready to discipline violations? Do the disciplinary procedures pass due process and legal muster? Does the association follow the spirit of the code it expects of its members?
- **Know your flashpoints and have positions and communications plans for rapid response.** Work with members to identify ethical issues inherent in your field. Establish policies to guide you through the trouble and plan in advance how you will respond.
- **Give members a spoonful of ethics with every education course.** Even when members acknowledge they need ethics education, they rarely attend sessions devoted to this topic. Instead, address the ethical dimension of any and all educational experiences they do choose. Use case studies based on common ethical dilemmas.

## Keyword Search

To continue researching this change driver, use these search terms, combining one "virtuality" term with one "meeting term": ***ethics, transparency, organizational ethics, applied ethics, codes of conduct, trust, ethical regulations, issue management, values-driven decisions, organizational corruption, mistrust of institutions, millennial values***

### Who Will Be Affected

Ethics are foundational and should be infused throughout all types of organizations. Leaders give ethics little thought until there's a serious problem, and then it is a priority. Organizations need to anticipate risks to their reputations and act consistently in ethical ways to prevent them. Organizations in trouble and struggling to survive are particularly vulnerable.

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# Workforce and Workplace Action Set

There is no more pressing topic these days than the future of work and the workforce. Work is changing, driven by technologies that are helpful but also threatening, often at the same time. The rise of automation could create work that is modularized and taskified, then farmed out piecemeal to workers, where once that work might have been covered by a single employee. That modularization could lead to a divided workforce of strategically focused, highly valued employees at the top and replaceable, task-based workers at the bottom.

At same time, there are clear roles and opportunities for human workers and the non-replaceable human decision-making and emotional skills humans possess. As automation moves forward, workplaces will mix humans and automation. The challenges will be helping humans acquire and develop in-demand skills in a fast-changing environment and advancing the diversity and inclusivity that are necessary for workforce and workplace success.



Associations will need to guide the industries and professions they represent through these changes, whether through advocacy, education, membership benefits, content development, or other member support functions. These changes also represent an opportunity for associations to be more effective and proactive in all areas of their operations. To assist with this vital task, the ASAE Foundation collaborated with a research team from Signature i and Foresight Alliance to create the ASAE ForesightWorks Workforce and Workplace Action Set. The action set includes nine action briefs that introduce the drivers of change that will shape the future direction of the workforce and the workplace. Each action brief explores forecasts, implications, and potential responses for organizations as they move forward.

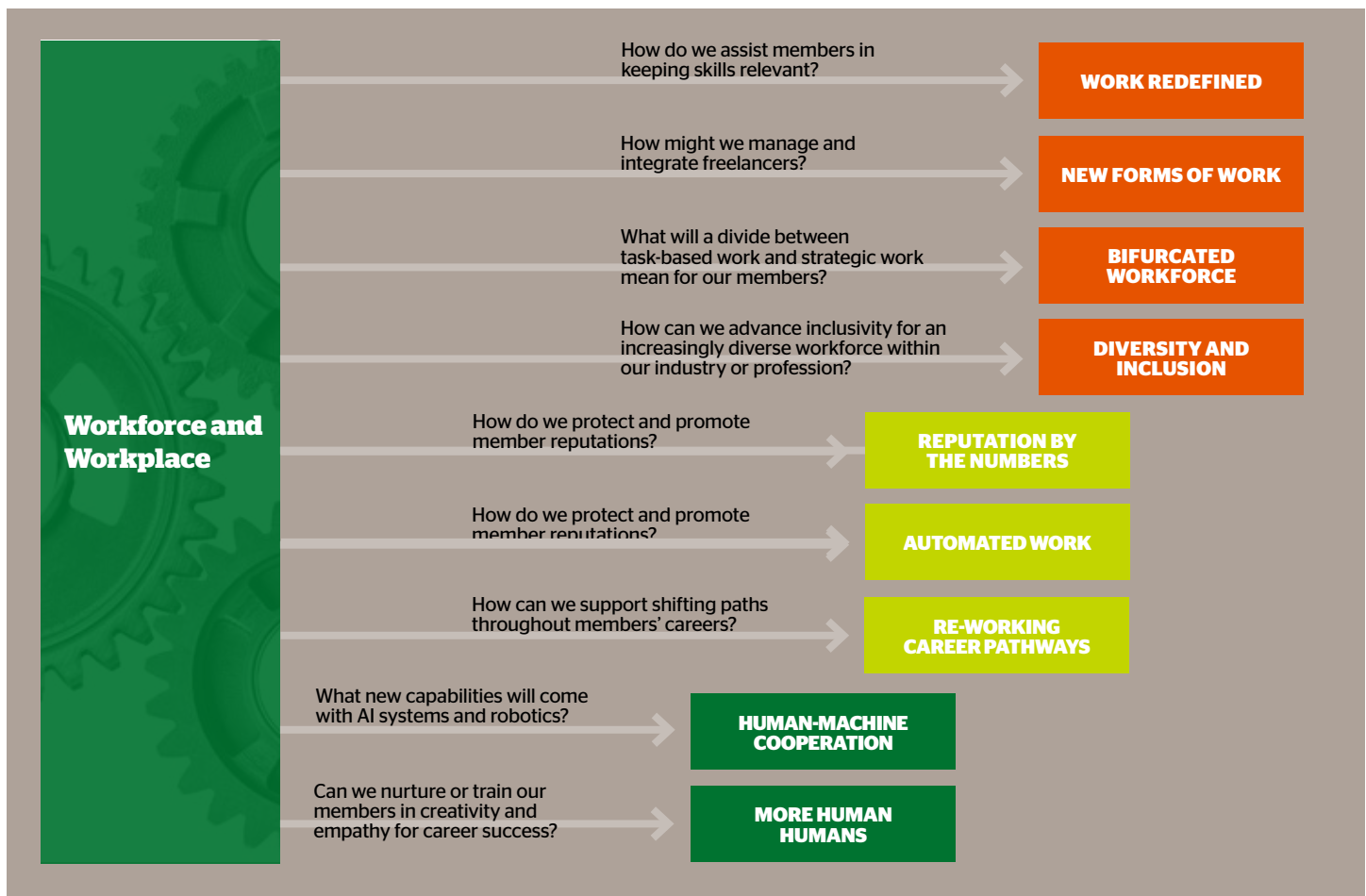
## Putting the Drivers of Change Into Context

The accompanying graphic connects each of the drivers of change to key questions related to the future of your organization or industry. The action briefs are designed to stimulate your thinking about implications, actions, and possible outcomes, as well as to inform and inspire new directions for your strategic planning, risk management, innovation, and environmental scanning efforts.

### KEY:

- Moving fast
- Medium speed or emergent
- More time to plan and prepare

Source: ASAE ForesightWorks





## The Elements of an Action Brief

Each action brief consists of four pages. These pages have been designed to work together or to be used independently for different purposes and audiences.

Page one can serve as a standalone page that summarizes the driver of change and its importance, or as an introduction to the other pages. This page provides a summary paragraph, forecasts—“probable futures” given the current trends and data—and key uncertainties—the “known unknowns” that need to be watched and considered when making downstream forecasts.

Page two is the supporting data page. This page elucidates some of the key trends that informed the forecasts, points to related ASAE ForesightWorks action briefs to help readers develop a comprehensive view, and provides a couple of supporting data points. The page provides evidential support for the forecasts described on page one.

Page three is the strategic insights page. Here you'll find material to help you discuss the driver of change in a strategy session. The page includes broad insights, the projected timing and speed of the change, and some potential alternative futures—possible (though not probable) futures that should be considered from a risk management perspective.

Page four suggests potential actions. This page offers specific steps for addressing the change, identifies the types of organizations expected to be affected, and keywords to support continued research in this action brief area.

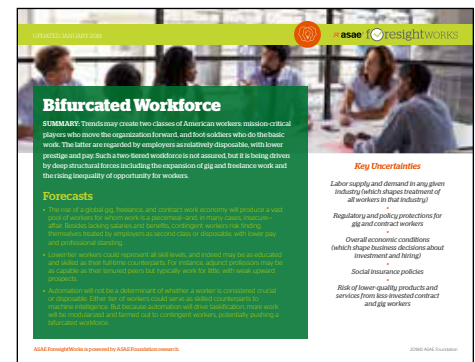
More in-depth guidance for thinking through and working with the action briefs, either on your own or with a group, can be found in the ASAE ForesightWorks User's Guide.

## Strategic Discussion Questions

Initial strategic questions are suggested here as a means of prompting discussion around the action brief set. You may want to choose a subset of the questions or create new questions to have a more targeted conversation with your group.

### Future implications

- How will new capabilities for outsourcing and crowdsourcing work impact our industry and membership?
- What jobs in our industry are or could be threatened by automation? What skills could become more valuable for members to possess?
- How could workforce changes affect the association workspace and the functions associations perform?







## Opportunities and challenges

- What training and content resources could help members navigate workforce and workplace changes?
- How might increased automation in our industry affect our membership base?

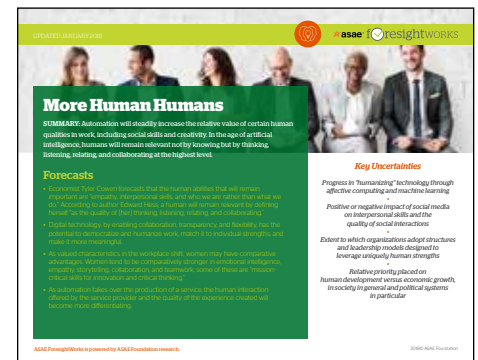
## Building awareness

- How do we integrate new types of workers into our organization and work processes?
- What sort of advocacy might be necessary to support our industry in the face of workforce changes?

## Additional Reading

These articles provide more insight into the drivers of change. They can be shared ahead of a discussion to familiarize the group with the concepts and possibilities captured by the action briefs.

- Pew Research findings on what Americans believe about the future of automation and work. <http://www.pewresearch.org/fact-tank/2017/10/04/6-key-findings-on-how-americans-see-the-rise-of-automation/>
- An optimistic view of automation and work from the American Enterprise Institute. <http://www.aei.org/publication/will-technology-enable-workers-or-replace-them-a-long-read-qa-with-daron-acemoglu/>
- McKinsey report on the skill shifts needed in different industries due to automation. <https://www.mckinsey.com/featured-insights/future-of-organizations-and-work/skill-shift-automation-and-the-future-of-the-workforce>
- Quartz on a study of the rising importance of non-traditional job structures. <https://qz.com/851066/almost-all-the-10-million-jobs-created-since-2005-are-temporary/>
- The *Washington Post* on China's universal reputation system. [https://www.washingtonpost.com/world/asia\\_pacific/chinas-plan-to-organize-its-whole-society-around-big-data-a-rating-for-everyone/2016/10/20/1cd0dd9c-9516-11e6-ae9d-0030ac1899cd\\_story.html](https://www.washingtonpost.com/world/asia_pacific/chinas-plan-to-organize-its-whole-society-around-big-data-a-rating-for-everyone/2016/10/20/1cd0dd9c-9516-11e6-ae9d-0030ac1899cd_story.html)
- Fast Company* on a new understanding of diversity and inclusion in the workplace. <https://www.fastcompany.com/3046358/millennials-have-a-different-definition-of-diversity-and-inclusion>
- The Economist* describes a study that forecasts that half of all jobs worldwide are vulnerable to automation. <https://www.economist.com/graphic-detail/2018/04/24/a-study-finds-nearly-half-of-jobs-are-vulnerable-to-automation>





The authors have worked diligently to ensure that all information in this work is accurate as of the time of publication and consistent with standards of good practice in the general management community. As research and practice advance, however, standards may change. For this reason it is recommended that readers evaluate the applicability of any recommendations in light of particular situations and changing standards.

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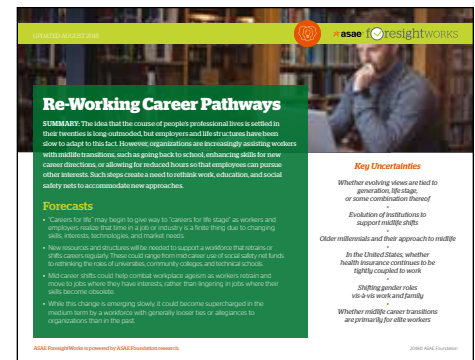
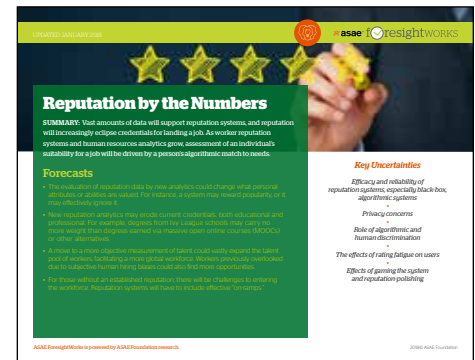
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# Automating Work

**SUMMARY:** Machine learning, innovative robotics, data analytics, and affective computing mean that growing swaths of work are potentially automatable. The impacts of automation on work and workers will vary substantially by industry, occupation, and even workplace—but they could transform most kinds of work and affect workers at every level, including senior management. Associations' members and their own workforces will increasingly be affected by automation.

## Forecasts

- Work automation is under way and will grow substantially, eventually displacing millions of workers, disrupting work structures, and pushing a broad societal and organizational rethink of how work is performed and managed. For the foreseeable future, automation will be an increasingly pressing issue for workers, employers, and governments.
- In the near to medium term, automation will tend to take over tasks within jobs rather than displacing entire occupations. Both automated and human work will become more taskified as a result, with humans often handling the more creative, interpersonal, or higher-value roles.
- Automation will move up the value chain. As it starts to affect knowledge workers and executives, their jobs will become more taskified, too.
- How automation affects a given industry or occupation will depend on a mix of factors including technical feasibility, business case, labor supply and demand, and regulatory and social acceptance.



## Key Uncertainties

*How rapidly automation technologies are adopted by industries*

•

*Whether there will be a tipping point in many industries beyond which automation becomes a competitive necessity*

•

*Progress of affective computing, which includes emotion detection and psychological sensitivity*

•

*Progress in robotics*

•

*How soon machines can understand and use natural language*

•

*Level of pushback from regulators and the public*

•

*The implications of automation for privacy, safety, and the quality of products and services*



## Supporting Trends

- **Human-machine hybrid work.** As intelligent systems permeate the work world, semi-autonomous systems that collaborate with humans—rather than fully autonomous systems—may become more prevalent.
- **Limits to automation job loss.** Automation-caused job loss may be less than worst-case forecasts, given the difficulty of automating highly interpersonal or creative tasks.
- **World's best (AI) boss.** Early studies are revealing that workers are comfortable with—and often prefer—AI software as a manager.
- **Automated management.** Smart machines are being developed for management roles.
- **Affective computing.** The progress of affective computing—which integrates emotion detection and psychological sensitivity into computers—will be an important variable in how much and what kinds of work can be automated.
- **Rise of the chatbots.** Companies are embracing chatbots as a new tool for customer interaction.
- **Robots beyond the factory.** The array of non-factory robots for commercial use is expanding.
- **Machine learning usability.** Machine learning, which teaches computers to “think” more like people, is getting easier and cheaper, which will allow computers to take on more human roles.

### Related Drivers of Change

- Human-Machine Cooperation
- Personalized Artificial Intelligence
- Anticipatory Intelligence
- Work Redefined

## Notable Data Points

### JOB LOSSES SO FAR

As of late 2017, about  
**6% of Americans**  
**reported losing pay,**  
hours, or their job due to automation.

*Source: Pew Research Center*

### REPLACEABLE WORK

Existing technologies could  
**automate 45% of today's**  
**work activities,**  
and about 60% of all occupations could see  
30 % or more of their activities automated.

*Source: McKinsey Quarterly, Where machines could replace humans—  
and where they can't (yet)*

### AMERICANS FAVOR RESTRICTIONS

**85% of Americans favor**  
**restricting automation**  
to jobs that are dangerous or  
unhealthy for humans.

*Sources: Pew Research Center*



## Strategic Insights

- Associations should consider the implications of automation both for their members and for their own operations and competitive positioning. Could members be supported with new content, new services, or new products that help them explore the pros and cons of automation both for their industry and for their organizations? Could the association itself benefit from automating some tasks that now consume the attention of staff or volunteers?
- The advance of automation may outpace regulatory oversight. Monitoring the regulatory response and working to shape it could become a high priority for many associations.
- Some volunteer roles might be supplemented or replaced by automation. This could alter associations' needs and strategies for volunteering, as well as the association-volunteer relationship itself.
- Different fields will be affected quite differently by automation depending on their level of automatable tasks. Associations could undertake or commission studies to understand automation's potential impacts for the fields they serve.
- Associations that serve industries in which workers are losing their livelihoods to automation could lose members.
- Automation will push more work to be taskified: divvied up into modules that are parceled out to machines or humans as appropriate. Taskification that is undertaken for other reasons—such as outsourcing—could unintentionally smooth the way for automation.

### Timing

- **Stage:** Emergent, and variable across sectors and functions; early penetration likely in customer service, retail, and routine managerial functions
- **Speed:** Medium to rapid depending on function, with potential regulatory and acceptance barriers

### Potential Alternative Futures

- **New jobs through automation:** As the strengths of artificial intelligence vis-à-vis human workers become clearer, automation generates new jobs, and new kinds of work, much more than anticipated.
- **Humans for a premium:** Consumers are willing to pay extra to interact with a human, rather than an automated system, in their commercial transactions, which helps sustain the market for human labor.
- **Human-centered automation:** Due to strong societal pushback, tech companies discover a more receptive market for their automation-related innovations by designing specifically to augment human capabilities.



## Take Action

- **Lead, adapt, or adopt the rise of automation in your association's field.** If automation is inevitable, will your association choose to lead in automating work, including helping develop the technologies and standards? Will you help members learn to work effectively with machines and master the automation of key functions? Which tools and capabilities now emerging in other fields could be adopted and adapted for use by your members? Which jobs can machines do more accurately and effectively than humans? Associations need to get out in front of this change and help their members automate their work.
- **Examine your association's business processes and identify functions to automate.** Many routine processes can be automated. Where can your association use automation effectively to improve the member experience? Could you use more self-help kiosks at meetings? Automate your government affairs calls to action? Streamline member renewals, registration, and other routine processes?
- **Decide where the human touch matters.** The ability to interact with caring and interested humans can be an important differentiator for associations. Human interaction can add meaning and deepen relationships. Where people would rather have machines and automated processes take care of business, do so; where people crave human connection, meet the need.
- **Train members how to stay smarter than the machines.** As more people adjust to automation in their jobs, the need for retraining will grow. Critical thinking skills to monitor and assess the outcomes from automated processes will become more important. And those still uniquely human skills of leadership, teambuilding, and emotional intelligence will be critical to continued employment.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *automation, machine learning, artificial intelligence, AI, blockchain, robotics, robots, taskification, affective computing, natural language, human-machine collaboration, chatbots, work, jobs, Frey and Osborne*

### Who Will Be Affected

Associations serving companies and professionals in healthcare, accounting, law, finance, and hospitality are already dealing with the growth of automation. Many others will soon find their members affected. Trade associations are more likely to help members develop the technologies to automate; professional membership societies are more likely to help members manage the implications for their careers.

### About ASAE ForesightWorks

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- tools for applying insights from the research in your association;
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# Bifurcated Workforce

**SUMMARY:** Trends may create two classes of American workers: mission-critical players who move the organization forward, and foot-soldiers who do the basic work. The latter are regarded by employers as relatively disposable, with lower prestige and pay. Such a two-tiered workforce is not assured, but it is being driven by deep structural forces including the expansion of gig and freelance work and the rising inequality of opportunity for workers.

## Forecasts

- The rise of a global gig, freelance, and contract work economy will produce a vast pool of workers for whom work is a piecemeal—and, in many cases, insecure—affair. Besides lacking salaries and benefits, contingent workers risk finding themselves treated by employers as second-class or disposable, with lower pay and professional standing.
- Lower-tier workers could represent all skill levels, and indeed may be as educated and skilled as their full-time counterparts. For instance, adjunct professors may be as capable as their tenured peers but typically work for little, with weak upward prospects.
- Automation will not be a determinant of whether a worker is considered crucial or disposable. Either tier of workers could serve as skilled counterparts to machine intelligence. But because automation will drive taskification, more work will be modularized and farmed out to contingent workers, potentially pushing a bifurcated workforce.

## Key Uncertainties

*Labor supply and demand in any given industry (which shapes treatment of all workers in that industry)*

•

*Regulatory and policy protections for gig and contract workers*

•

*Overall economic conditions (which shape business decisions about investment and hiring)*

•

*Social insurance policies*

•

*Risk of lower-quality products and services from less-invested contract and gig workers*





## Supporting Trends

- **Growth of the blended workforce.** “Blended” workforces, comprising both full-time and gig or contract workers, are spreading, and this is leading to workplaces with substantial numbers of workers who may be working together shoulder-to-shoulder while in very different career situations.
- **Growth of global gig economy.** The global gig economy is projected to grow, becoming an important driver of future employment growth.
- **Freelancing expected to grow.** A number of drivers point to the continued growth of freelancing—which is one kind of gig work—as a work model in the United States.
- **Stalled income growth.** Income growth has stalled for lower- and middle-income workers in advanced economies, reinforcing economic and social divides.
- **Rising U.S. income inequality.** U.S. income inequality has been rising since the mid-1970s, in part reflecting a growing inequality of opportunity.
- **Decline in labor’s share of income.** The share of U.S. national income going to workers has been declining since 2001.

### Related Drivers of Change

- 21st-Century Guilds
- American Inequality
- New Forms of Work
- Automating Work

## Notable Data Points

### BENEFITS OF BLENDING

A 2016 survey found that  
**93% of companies  
in the U.S. are using a  
blended workforce:**  
freelance workers teaming up with  
conventional employees on projects.

*Source: Field Nation and Future Workplace, The Gig Economy Study*

### ALMOST ALL RECENT JOBS CONTINGENT

94% of the 10 million jobs  
created in the U.S. between 2005 and 2015  
were contingent, including  
**60% tied directly to the  
increase in freelancers,**  
independent contractors,  
and company contractors.

*Source: National Bureau of Economic Research*

### COLLEGE, DOWNGRADED

A British study found  
**a rise in the share of college  
graduates taking “menial”  
jobs (e.g., clerical work)**  
that formerly would have  
gone to non-graduates.

*Source: Higher Education Career Services Unit*



## Strategic Insights

- Bifurcation would lead to a horizontal fracture in the workforce pyramids of many professions, and thus to a disruption in the career paths of many categories of members. For workers in many fields, advancement up the career ladder may be less assured than in the past. Associations may need to be much more attentive to this kind of career divergence within their membership and to distinguish their services and products accordingly—or they may need to make a hard decision to serve one tier or the other.
- In a bifurcation scenario, the interests of workforces and employers could diverge. Associations could become battlegrounds between these competing interests.
- With or without bifurcation, new kinds of associations are likely to arise to serve parts of the growing contingent workforce. Freelancers Union provides an early but well-developed model.
- Bifurcation may foster a return to the trades by educated workers, as it becomes clearer that education and skills don't guarantee job security or higher pay.
- Worker-organized cooperatives could make a comeback in advanced economies as a response to the power disparity between employers and contingent workers. Successful, well-established cooperatives exist in Europe and elsewhere, e.g., the Mondragon network of cooperatives in Spain.

### Timing

- **Stage:** Growth in some industries, emergent or nonexistent in others
- **Speed:** Accelerating in fields that automate rapidly or where the gig economy is well under way; slow or no growth in fields resistant to automation and gig work

### Potential Alternative Futures

- **Workforce patchwork:** Bifurcated workforces manifest in some industries but not in others, based on structural and regulatory factors.
- **Salary = excellence:** Research reveals that salaried workers produce more profitable outcomes, prompting industries from food service to financial services to revert to full-time hires.
- **Valuing contingent workers:** Forward-thinking companies cultivate a loyal pool of contract workers by providing a partial set of benefits and competitive pay.



## Take Action

- **Define the mission-critical people in your organization.** These people aren't always your most senior employees. They may hold essential historical knowledge, have a network of critical relationships, or possess content expertise essential to your mission. Value and reward these staff members to retain their talents.
- **Explore the positive possibilities of intentional bifurcation.** Could you creatively staff your association's non-critical positions through collaborative arrangements with other associations, retaining an association management company, or contracting with consultants or freelance workers? Likewise, could your members' companies opt for bifurcation as a strategic staffing decision?
- **Appreciate the continuity of a familiar face.** Association members and customers like working with people they know to navigate associations or businesses. A designated account manager or point of contact can fulfill this need. This familiar face can be backed up by other staff and automated processes.
- **Foster workforce development opportunities in your field.** Many professions and trades rely on people trained for supporting roles. Could your association train lesser-skilled people to meet workforce needs while respecting the scope of work of members with greater expertise? Associations that can successfully accommodate members with different tiers of expertise often exercise greater influence over the strategic direction of their industry or field.
- **Honor your association's values.** Potential exploitation of second-tier employees could conflict with your association's stated values or your members' sense of fair play. Anticipate how you will lead in issues of pay equity, advancement opportunities, health and safety, and other workforce concerns.

## Keyword Search

To continue researching this change driver, use these search terms:

*work, automation, income inequality, disposable workers, contingent work, freelance, precariat, work automation, taskification, flexible work, gig economy, temporary work, e-lancing, underemployment, blended workforce, workforce participation*

### Who Will Be Affected

Organizations that support flexible staffing approaches (professional employee organizations, temporary staffing companies, association management companies) may benefit from shifts toward a bifurcated workforce. Industry consultants and senior workers seeking more flexible employment could fill these staffing needs. Human resource professionals may have to redesign compensation and benefits to accommodate creative staffing approaches.

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# Diversity and Inclusion

**SUMMARY:** American society and workplaces will continue to grow more diverse and inclusive as values evolve and younger generations increase their share in the demographic mix. This will occur against a backdrop of social, political, and racial polarization—and the workplace will be a primary arena in which contending views collide and issues are worked out. To meet these challenges, inclusion efforts can be treated as a systemic priority, supported by a new generation of tools and processes.

## Forecasts

- Given ongoing trends—immigration, rising racial and ethnic diversity, contention around LGBTQ rights, and changing values—diversity and inclusion will be a primary social and human resources issue for decades.
- New diversity and inclusion issues (such as cognitive diversity, genetic discrimination, etc.) will arise continuously. Some will be novel; some may pit the rights of different groups against each other.
- The workplace is one of the few places where people from diverse backgrounds are thrown together by circumstance, rather than choice. Increasingly, businesses and organizations may be the primary location in which issues of diversity and inclusion are worked out.
- Millennial demography and values will push organizations to make diversity and inclusion a strategic priority.

## Key Uncertainties

*Directions in American politics and their effects on society*

•

*The pace, nature, and demography of immigration*

•

*Evolution and effects of social and political polarization*

•

*The speed at which millennial attitudes shift American culture, and how those attitudes evolve*

•

*The changing nature of identity and its effects on social fragmentation*



## Supporting Trends

- **Diverse millennials.** Diversity may be the millennial generation's core characteristic. According to Pew, the millennial generation was 56 percent white, 21 percent Hispanic, 13 percent black, and 7 percent Asian in 2017.
- **Increasing acceptance of LGBTQ rights.** There has been a marked increase in the social acceptance of LGBTQ people in American society in recent decades.
- **Declining racial prejudice in the United States.** American attitudes about race continue to be complicated and situational, but overt racial prejudice has ebbed significantly in the past 30 years.
- **Immigration swelling U.S. population.** According to the U.S. Census Bureau, immigration accounted for 48 percent of U.S. population growth in 2017.
- **Blurring of strict gender roles.** Among those under age 34, strict gender rules and conventional gender stereotypes are fading.
- **Diversity policy in the corner office.** Diversity and inclusion are increasingly being seen as CEO-level strategic priorities.
- **Algorithmic discrimination.** Widespread use of data analytics may lead to data-based discrimination.
- **Data tools for improving diversity and inclusion.** Talent processes and practices are increasingly being measured and monitored for embedded bias using new data-analytics tools.

### Related Drivers of Change

- Immigration-Driven Demography
- Aging World
- American Inequality
- Empowered Women
- The Splintered Society

## Notable Data Points

### ASIAN-AMERICAN POPULATION GROWTH

The overall Asian-American population reached an estimated  
**18.8 million people in 2017, or 5.8% of the U.S. population.**

Source: United States Census Bureau

### A MORE MULTIRACIAL UNITED STATES

**In 2015, the rate of interracial marriage in the United States was 17%,**  
up from 3% in 1967, the year of the Loving v. Virginia court decision.

Source: Pew Research Center

### D&I AND THE BOTTOM LINE

The 50 companies on Fortune's 2016 Best Workplaces for Diversity list  
**averaged 24% higher revenue growth**  
than companies that failed to make the list.

Source: Fortune





## Strategic Insights

- Making inclusion a strategic priority is a necessity for associations—specifically by giving it a systemic, high-profile role, building it into processes, and adding measurement and accountability. Early research suggests this approach can improve teamwork, spark innovation, and boost millennial engagement. Over time, it might even help alleviate divisions in society. Fortunately, powerful trends favor successful workplace D&I, including the push to make D&I a strategic effort and the growing application of HR analytics to measure and enforce it.
- Conversely, associations need to consider that they (like other American workplaces) could become a new ground zero for cultural divisiveness. In a worst-case scenario, associations could splinter along lines of identity and perspective. Taking a proactive internal stance for inclusion could be important in preventing such a future.
- Similarly, organizations that do make D&I a centerpiece of their public identity could find themselves the target of backlash and boycotts and will need to be prepared for this possibility.
- Significant new D&I issues will continue to emerge. In the near term, these could include algorithmic discrimination, genetic discrimination, and “lookism.” Internal advocacy groups could be created to explore such issues and develop solutions.
- Associations can help members learn how to use the growing genre of HR analytics tools to identify gender and racial bias in the workplace, in job descriptions, and in other hiring and promotion practices.

### Timing

- **Stage:** In a multi-decade growth stage
- **Speed:** Medium, as some drivers are slow-moving, including demography and deeply rooted attitudes

### Potential Alternative Futures

- **Heating up the melting pot:** Rising diversity and changing generational attitudes speed up racial, ethnic, and cultural mixing.
- **Sociocultural fragmentation:** Perceived irreconcilable differences cause different social and political groups—which partially follow racial and ethnic lines—to retreat into varying degrees of separatism.
- **Dwindling immigration:** A combination of changes in U.S. policy, economic and demographic change in countries of origin, and shifts in how the United States is perceived around the globe cause immigration to dwindle.



## Take Action

- **Speak to both the heart and self-interest.** Why diversity and inclusion matters will vary by association. Your members may work in direct service with growing immigrant populations. Your industry or field must recruit talented, diverse teams to remain vital. Clients may demand diverse professional teams.
- **Put your commitments in writing.** A formal board policy statement can spell out why diversity and inclusion matters, where you will focus your effort, and how you will work to get results. If you make your intentions public, you will hold yourself accountable and clarify how you measure progress.
- **Get senior leaders on board.** High-level volunteer leaders and staff must demonstrate this is a priority and organize the people and resources to get the job done.
- **Work in multiple dimensions for change.** Diversity and inclusion initiatives should address culture in your field and industry, your association, and your staff. Recruit for diversity, foster welcome and inclusion practices, promote access to opportunities, and insist on equity in policies and decisions. Where you focus first will depend on your priorities and your maturation in this cultural change.
- **Expect to work hard and long at diversity and inclusion.** Getting your organization to change will not be easy: stories about backlash and resistance abound. Stay current with research about what does work to avoid wasting time and goodwill. Seek the counsel and collaboration of others, especially organizations with a sustained and mature commitment. And when your visible actions and words fall short of your stated intentions, remember associations are human enterprises and press ahead with humility and conviction.

## Keyword Search

To continue researching this change driver, use combinations of these search terms: *diversity, diverse, workforce, inclusion, rights, race, racial, multiracial, interracial, LGBT, LGBTQ, LGBTI, minority, minorities, discrimination, algorithmic discrimination, genetic discrimination, Islam, Muslims, cognitive diversity, millennial, immigrant, gender, transgender, gender-fluid*

### Who Will Be Affected

This driver of change is critical to the future of all organizations and universally affects human well-being and societal stability. Given the many forms that human diversity has taken and may yet take in our future, we all will be challenged to reflect, adapt, and evolve.

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# Human-Machine Cooperation

**SUMMARY:** Though many forecasts include substantial job losses due to automation—and such losses are indeed already occurring—many jobs will rely on cooperation between humans and machines. While less disruptive than total automation, human-machine cooperation will be a massive shift, with entire work processes becoming machine-oriented and humans learning to complement automation's role.

## Forecasts

- Work automation will proceed for the foreseeable future, mostly by taking over tasks within a job rather than by taking over entire jobs. Humans will handle the remaining tasks in ways that complement what automation can do.
- The ratio of automated work to human work will vary substantially by industry, job, and workplace. Employers will embrace automation to the extent that they can, attracted not only by lower labor costs but also by higher quality and greater output.
- The human side will often be about planning and decision making, managing and developing people, or creative work—tasks that are all hard to automate with current technologies.
- Working alongside computers will frequently require humans to have higher levels of education and skills. Even many factory jobs will require a technical degree.

- ### *Key Uncertainties*
- The speed of development and adoption of automation technologies*
  - 
  - The speed at which organizational leaders learn to redefine roles and processes*
  - 
  - The ratio of automatable tasks versus human tasks in a given work process*
  - 
  - Regulatory and societal reaction to automation*
  - 
  - People's tolerance for working with machines, including as managers*
  - 
  - Rates of progress in machine learning, affective computing, and natural-language capabilities—each of which will significantly extend the kinds of work machines can do*



## Supporting Trends

- **Human-machine hybrid work.** As intelligent systems permeate the work world, semi-autonomous systems that collaborate with humans—rather than fully autonomous systems—may become more prevalent.
- **Limits to automation job loss.** Automation-caused job loss may be less than worst-case forecasts, given the difficulty of automating highly interpersonal or creative tasks.
- **Emotional intelligence in the age of AI.** In the age of artificial intelligence, humans will remain relevant not by knowing but by thinking, listening, relating, and collaborating at the highest levels.
- **Learning from machine learning.** While the focus of machine learning has been on what machines can do, early applications are showing that humans are learning from AI as well.
- **Affective computing.** The pace of development of affective computing—which integrates emotion detection and simulated psychological sensitivity into computers—will be an important variable in how much and what kinds of work can be automated.
- **Machine learning usability.** Machine learning, which involves teaching computers how to “think” more like people, is getting easier and cheaper as new tools come online, and this will enable computers to take over more human roles.

### Related Drivers of Change

- Automating Work
- More Human Humans
- Work Redefined

## Notable Data Points

### ACTIVITIES, NOT OCCUPATIONS

McKinsey argues that less than **5% of occupations could be fully automated** using current technology—but varying percentages of employee activities could be automated.

*Source: McKinsey Quarterly, Where machines could replace humans—and where they can't (yet)*

### HARD TO AUTOMATE

**The hardest activities to automate involve managing and developing people** (9% automatable) or decision making, planning, and creative work (18% automatable).

*Source: McKinsey Quarterly, Where machines could replace humans—and where they can't (yet)*

### BOOSTING HUMAN JOBS

**Partial automation can increase jobs**

if it boosts overall demand. Scanners and point-of-sale systems reduced supermarket labor costs in the 1980s, but cashier jobs grew an average of 2% per year from 1980 to 2013.

*Source: McKinsey Quarterly, Where machines could replace humans—and where they can't (yet)*



## Strategic Insights

- Understanding that much of work automation will in fact be human-machine cooperation—rather than machines eviscerating entire occupations—will put associations in a stronger position to help their members navigate the sea changes ahead.
- In many industries, tensions could run high if employers see strong motivations to automate while workers and activists see only threats to livelihood. Associations can walk that fine line, advocating the benefits of automation while addressing the challenges confronting both workers and employers. Sticking to a practical focus will help all parties achieve more fruitful outcomes: What skills will workers need to stay competitive? How can employers design and execute the smoothest transition possible?
- Over the next few years, more and more workers will need to modify their skills to collaborate with and/or manage smart machines. Associations can serve as thought leaders, providing expertise and best practices specific to their industries.
- Adaptability may become a key skill for workers as workplaces evolve more rapidly, driven by the pace of automation. New training approaches, such as microlearning, could support fluid job shifts.

### Timing

- **Stage:** Growth, as more fields and occupations engage with automation and learn how to complement it with human skills
- **Speed:** Rapid, accelerating over the next decade and beyond as automation becomes a competitive imperative

### Potential Alternative Futures

- **Tortoise and hare industries:** Progress toward automation is fast in some domains (e.g., finance, healthcare) and much slower in others (e.g., those that are high-touch).
- **Human thriving:** Societies discover that human-machine cooperation can not only free human workers from dull, routine tasks but—by showing how to optimize work tasks—it can help humans work at a higher, more gratifying, and potentially even better-paid level.
- **Going too far:** Some business leaders overestimate the potential of automation and ignore crucial human elements, leading to devastating failures.





## Take Action

- **Automate the processes people want automated.** People are willing to accept doing a wide range of customer transactions on their own in the rest of their lives. Likewise, automation can help associations handle high-volume, routine tasks with 24-7 machine capabilities. Just make it easy to reach a human when the machine can't deliver the service needed.
- **Automate your high-volume, repetitive transactions.** Good database systems can expedite routine member transactions like member renewals, registrations, and purchases, bringing them closer to the one-click experience the e-retail powerhouses like Amazon offer. Examine other work processes for opportunities such as chatbots to answer frequently asked questions and machine scoring for credentialing applications and resume review. Think mobile to serve members and staff wherever they may work.
- **Ease the burden out of chapter leadership.** Chapter volunteer leaders might welcome the chance to automate filing the many required reports. They may grow frustrated if processes are still manual long after they could have been streamlined to make their lives easier.
- **Lead the human factors design for human-machine interface.** Introducing technologies into complex human workflows is not trivial where quality, health, and safety are essential. Bring users together with technology providers to identify issues and design solutions.
- **Focus your training on the jobs machines can't do as well.** Prepare people to be the creators, decision makers, and human development experts. Where machines can play a supporting role, teach people how to use the technologies to free the time for the human touch.

## Keyword Search

To continue researching this change driver, use these search terms:

*artificial intelligence, AI, work automation, affective computing, machine learning, robotics, robots, taskification, behavioral computing*

### Who Will Be Affected

Some associations will not have the money or capacity to implement these technologies immediately. Still other associations will have members that won't tolerate slow adoption of innovative technologies. And some members may be unwilling or unable to use automated systems. The technology providers helping automate businesses will be a growing target for membership, exhibiting, and sponsorship.

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# More Human Humans

**SUMMARY:** Automation will steadily increase the relative value of certain human qualities in work, including social skills and creativity. In the age of artificial intelligence, humans will remain relevant not by knowing but by thinking, listening, relating, and collaborating at the highest level.

## Forecasts

- Economist Tyler Cowen forecasts that the human abilities that will remain important are “empathy, interpersonal skills, and who we are rather than what we do.” According to author Edward Hess, a human will remain relevant by defining herself “as the quality of [her] thinking, listening, relating, and collaborating.”
- Digital technology, by enabling collaboration, transparency, and flexibility, has the potential to democratize and humanize work, match it to individual strengths, and make it more meaningful.
- As valued characteristics in the workplace shift, women may have comparative advantages. Women tend to be comparatively stronger in emotional intelligence, empathy, storytelling, collaboration, and teamwork; some of these are “mission-critical skills for innovation and critical thinking.”
- As automation takes over the production of a service, the human interaction offered by the service provider and the quality of the experience created will become more differentiating.

## Key Uncertainties

*Progress in “humanizing” technology through affective computing and machine learning*

•

*Positive or negative impact of social media on interpersonal skills and the quality of social interactions*

•

*Extent to which organizations adopt structures and leadership models designed to leverage uniquely human strengths*

•

*Relative priority placed on human development versus economic growth, in society in general and political systems in particular*



## Supporting Trends

- **Emotional intelligence in the age of AI.** In the age of artificial intelligence, humans will remain relevant not by knowing but by thinking, listening, relating, and collaborating at the highest level.
- **Human-machine hybrid work.** As intelligent systems permeate the work world, semi-autonomous systems that collaborate with humans—rather than fully autonomous systems—may become more prevalent.
- **Affective computing.** Affective computing integrates emotion detection and simulated psychological sensitivity into computers.
- **Predictive analytics.** Companies are adopting predictive analytics to turn their data into anticipatory knowledge.
- **Women's professional standing.** Women are advancing in professional and management positions.
- **Smartphone dependence.** Smartphone users report heavy dependence on their devices.
- **Connecting online and real-life lives.** People are taking their online friendships offline into the real world via apps.
- **Learning to learn.** Rapid changes drive the need to learn how to learn.
- **Mentoring 2.0.** Mentoring programs help retain millennials.

### Related Drivers of Change

- Automating Work
- New Forms of Work
- Empowered Women
- Bifurcated Workforce
- Human-Machine Cooperation
- Mentoring 2.0

## Notable Data Points

### ESSENTIAL KSAS

In a 2016 survey of essential knowledge, skills, and abilities for the UK workforce, **cognitive and social skills rose to the top.**

*Source: Deloitte*

### PROFESSIONAL WOMEN

In 2015, women in the U.S. represented 46.8% of the national labor force but held **51.5% of all management, professional, and related positions.**

*Source: U.S. Department of Labor Bureau of Labor Statistics*

### REAL-LIFE FRIENDSHIPS

Meetup.com, an app that enables people with similar interests to convene in real life, boasts more than **288,000 interest groups and over 30 million members across the world.**

*Source: Meetup.com*



## Strategic Insights

- As collaboration becomes more essential, the value of the network of relationships that associations can foster will increase.
- Mentoring programs could become a key association benefit because they help workers nurture relational skills and build professional networks.
- Associations will need to offer more proactive, anticipatory, personalized services that treat humans as valued individuals.
- Training needs to shift toward soft skills; education needs to shift from remembering facts toward social and emotional intelligence, creativity, teamwork, and learning to learn. Interactive, experiential learning will grow in importance relative to lecture-style content delivery.
- Association metrics will need to emphasize growth in human skills and relationships in addition to meeting numerical membership and income targets.
- Associations in historically male-dominated fields may wish to actively recruit women into their field and into leadership and volunteer roles in light of this new environment.
- In the coming climate, older workers' unique contributions—institutional memory, wisdom about best practices, lateral problem-solving, etc.—could grow in value.

### Timing

- **Stage:** Growing demand for uniquely human skills, in parallel with the growth of automation
- **Speed:** Moderately paced growth in demand for emotional intelligence and interpersonal skills

### Potential Alternative Futures

- **Affective computing:** Computers gain emotional intelligence and “human” skills, enabling them to assume more roles.
- **Less human humans:** Addiction to technology erodes human social skills when they are most needed.
- **Divided humans:** A wide variety of fears and divisions (racial, ethnic, socioeconomic, and political) further divide and isolate people just at the point when collaboration is most crucial.
- **Healthy technology:** Consumers demand less-addictive tech products that encourage the growth and maintenance of emotional intelligence and social skills.



## Take Action

- **Take time to care.** Organizations need to have sufficient staff and time to deliver high-touch, empathetic interactions. High-productivity business models can push out the time for caring. Organizations may need to remove the wasted time in their processes to create time to care. Get boards off the operational issues and into generative discussions where they have more opportunity to relate to each other.
- **Reward the behaviors you want.** Are your staff and volunteers evaluated on and rewarded for empathy, creativity, and teamwork? If organizations want to see more trust, they need to reward these behaviors.
- **Emphasize leadership and soft skills.** Leaders need more self-awareness. Mentoring and training program can focus on soft skills. Learning to listen well and tell stories will distinguish humans from their artificial-intelligence counterparts.
- **Acknowledge diversity and privilege.** Associations need to become more sensitive to issues of diversity and inclusion and work effectively with humans in all the ways their talents and needs manifest. Boards need to incorporate a more diverse voice of the member into their strategic planning sessions.
- **Bring the human connection into remote work.** As more people work and volunteer remotely using online and virtual technologies, organizations will have to work harder to create environments that help people connect and recognize each other's gifts and needs.
- **Bake humanity into your culture.** Core values will deserve more than lip service. They need to be front and center in staff and volunteer development training, assessment, and countless everyday rites of engagement.

## Keyword Search

To continue researching this change driver, use these search terms:

*emotional intelligence, soft skills, emotional labor, machine collaboration, machine learning, botification, smart machines, symbolic analysts, creative professionals, automation*

### Who Will Be Affected

The need for more human humans speaks to the future of the human condition and directly affects the people business of all associations and the hospitality and service businesses that support them. Organizations of all types need to retain their humanity even while they take full advantage of future technological capabilities.

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# New Forms of Work

**SUMMARY:** Freelance, gig, contract, and temporary work and the infrastructure to support them (e.g., online platforms and reputation systems) are growing. The number of independent professionals is expanding, and networked organizations rely on them. Associations will have new opportunities to serve these workers and advocate for their interests.

## Forecasts

- While the gig economy (as measured in the ground transport and lodging industries) does not seem to be affecting payroll employment in most places, cannibalization is a future possibility.
- Online talent platforms, including gig-economy digital marketplaces, could improve productivity, grow some kinds of employment, and boost labor force participation globally.
- According to Freelancers Union and Elance-oDesk (now Upwork), new forms of work will “have major impacts on how Americans conceive of and organize their lives [e.g., how time is structured], their communities, and their economic power.”
- Decisions about the future of the social safety net, and especially about access to health insurance and retirement benefits, will significantly affect the viability of new work forms.
- Work restructuring will be driven in part by automation as humans share work with machines.



## Key Uncertainties

*Changing regulatory climate for new work patterns*

•

*Economic conditions affecting hiring and employer confidence*

•

*Societal tolerance for potential adverse impacts of new work forms—e.g., less certain employment and reduced access to the social safety net*

•

*Evolution of millennial attitudes toward the freelance and gig work lifestyle as the millennial cohort enters new life stages*



## Supporting Trends

- **Growth of global gig economy.** The global “gig economy,” in which workers either freelance, work under short-term contracts, or work as independent contractors, is projected to grow.
- **Drivers of freelance growth.** Demand is increasing and an infrastructure to support freelance work is forming.
- **Growth of the blended workforce.** “Blended” workforces, consisting of conventional staff and freelancers, are spreading.
- **Worker reputation systems.** Reputation systems have the potential to effectively match prospective workers to organizations.
- **Remote work as a benefit.** Remote (or virtual) work is playing an increasingly important role in the flexible workforce.
- **Working from home.** The number of Americans telecommuting and working from home continues to rise.
- **Changing nature of entrepreneurship.** Entrepreneurship is evolving into new forms that differ from traditional entrepreneurship.
- **Virtual volunteering.** More volunteering is happening online.

### Related Drivers of Change

- Automating Work
- Work Redefined
- Reputation by the Numbers
- Human-Machine Cooperation
- 21st-Century Guilds
- Microlearning

## Notable Data Points

### GIGGING GROWS

The online talent platforms that support the gig economy **could add \$2.7 trillion, or 2%, to global GDP by 2025.**

*Source: McKinsey Global Institute, Connecting talent with opportunity in the digital age*

### FREELANCERS

A survey commissioned by leading freelancer groups found that **53 million Americans engaged as freelancers** at some point during 2014.

*Source: Edelman Berland, Freelancing in America: A National Survey of the New Workforce*

### BLENDED

**93% of respondents** in a recent study reported that **freelancers work with full-time employees** on their company's projects.

*Source: Field Nation, The Rise of the Blended Workforce in the New Gig Economy*



## Strategic Insights

- At their best, according to advocates, new forms of work will let workers “pursue more meaningfully independent lives,” give businesses timely access to needed skills, and promote an innovative, nimble economy.
- Associations have the opportunity to offer targeted services to members who participate in freelance and gig employment, including employment services and benefits usually provided by payroll employers.
- Alternatively, new forms of work may call for new associations that cater to the unique needs of freelance, gig, contract, and temporary workers and advocate for them in the wider society.
- Associations have an opportunity to help members track changes to the complex network of workforce regulations and to advocate for regulations that benefit their members.
- Associations can help members gain the skills needed to effectively manage a blended workforce that includes freelancers, who will often be working off site, sometimes in another country.
- Associations may be in a position to support reputation systems that can support freelancing and gig work in their industries.

### Timing

- **Stage:** Growth that could be nearing saturation in some sectors
- **Speed:** Moderate, with gig-employment growth significantly exceeding payroll-job growth in some sectors

### Potential Alternative Futures

- **Customer first:** Service providers choose employees over contract workers because they provide better customer service.
- **Security first:** The system of temporary, contract, and gig workers fails as a social structure—workers reject it because it fails to provide stable, secure employment and benefits.
- **Safety net backlash:** Protections for permanent workers become so strict that the great majority of new hires are for temporary positions, as is already the case in France.



## Take Action

- **Look at the work your association needs to do and find cost-effective ways to boost your staff capacity.** Many associations already contract with temporary employees to staff major meetings or manage peak-demand times. When someone leaves, consider whether that job can be restructured using outside expertise. Some associations may want to turn to members who are willing to work for hire on short-term tasks that cannot be completed using volunteers.
- **Consult with HR professionals about legal use of independent contractors.** The growth of freelance and gig economy work may blur existing labor law practices. Be sure that employees supervising project and task-oriented workers have a working knowledge of HR requirements. Associations may discover common legal and regulatory constraints that associations working together could clarify or remove.
- **Investigate whether new forms of work are growing in your industry.** Are organizations in your arena restructuring work and services? What effect will this have on your members and their livelihood? Are they relying on specific technology platforms to find and do this work? Is there a global dimension with new people and reimbursement scales coming into the picture? Your answers have important implications for your membership, advocacy, and education strategies.
- **Help members find and do freelance work.** You could create a database of people interested in working as consultants or on specialty tasks. Job posting services and talent fairs could help people access these opportunities. If you have enough interest, you may be able to organize special-interest groups, introduce a new membership class, provide education and training, and offer insurance and other benefits for members on short-term assignments.

## Keyword Search

To continue researching this change driver, use these search terms:

*gig economy, sharing economy, flexible workers, 1099ers, independent workers, contract workers, precariat, crowdsourcing, crowd work, TaskRabbit, UpWork, Uber, Lyft*

### Who Will Be Affected

All organizations are likely to feel greater pressure to control staffing costs by employing short-term workers, especially for peak-demand times. Small-to-medium-sized businesses may find hiring independent contractors gives them affordable access to a wider range of competencies. Some industries have already experienced significant disruption and restructuring of how work is structured and performed.

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# Reputation by the Numbers

**SUMMARY:** Vast amounts of data will support reputation systems, and reputation will increasingly eclipse credentials for landing a job. As worker reputation systems and human resources analytics grow, assessment of an individual's suitability for a job will be driven by a person's algorithmic match to needs.

## Forecasts

- The evaluation of reputation data by new analytics could change what personal attributes or abilities are valued. For instance, a system may reward popularity, or it may effectively ignore it.
- New reputation analytics may erode current credentials, both educational and professional. For example, degrees from Ivy League schools may carry no more weight than degrees earned via massive open online courses (MOOCs) or other alternatives.
- A move to a more objective measurement of talent could vastly expand the talent pool of workers, facilitating a more global workforce. Workers previously overlooked due to subjective human hiring biases could also find more opportunities.
- For those without an established reputation, there will be challenges to entering the workforce. Reputation systems will have to include effective "on-ramps."

## Key Uncertainties

*Efficacy and reliability of reputation systems, especially black-box, algorithmic systems*

•  
*Privacy concerns*

•  
*Role of algorithmic and human discrimination*

•  
*The effects of rating fatigue on users*

•  
*Effects of gaming the system and reputation-polishing*





## Supporting Trends

- **Worker reputation systems.** Reputation systems have the potential to effectively match prospective workers to organizations.
- **HR analytics.** Human resources analytics (often called people analytics) is expanding to include capability analytics, competency acquisition analytics, capacity analytics, employee churn analytics, corporate culture analytics, recruitment channel analytics, and leadership analytics.
- **Proliferation of credentials.** The number and types of credentials beyond traditional academic degrees are rising. Alternative credentials include professional certifications, licenses, and certificates of course completion and digital badges, from both universities and associations.
- **Occupational licensing on the rise.** Over the past several decades the number of workers and professions that require licensing in the United States has grown substantially.
- **Automated management.** Companies are developing software to automate day-to-day management; targeted capabilities include filling open positions and mediating disputes.
- **Algorithmic discrimination.** Widespread use of data analytics may lead to digital discrimination.

### Related Drivers of Change

- Automating Work
- Work Redefined
- Higher Education 3.0
- New Forms of Work

## Notable Data Points

### HR ANALYTICS

The rising importance of this field is reflected in a survey that found that **77% of organizations polled believe people analytics is important.**

*Source: Deloitte University Press, Global Human Capital Trends*

### AUTOMATED MANAGEMENT

By 2018, forecasts predict that more than **3 million workers around the world will be managed by “robobosses.”**

*Source: Gartner*

### OCCUPATIONAL LICENSING

In 2015, **25% of U.S. workers needed a state license,** five times the percentage in the 1950s and largely due to growth in licensed occupations.

*Source: U.S. Department of Labor Bureau of Labor Statistics*



## Strategic Insights

- Associations are already a source of reputation and credibility via membership requirements and certification of skills and training. This makes them remarkably well-positioned to play a role in the development of reputation systems within their field or industry.
- At the same time, a reputation economy could undercut the role associations have played in credentialing and certification, as metrics from third-party rating systems compete with the validation bestowed by associations.
- For people just starting in their field, associations could play a role in helping to build reputation by tying membership to skills and facilitating processes that help members build reputations of their own.
- For human resources departments, a time of change is at hand as these new systems are deployed. This could spell a shift in the role of HR as hiring manager and as monitor of data for career development and advancement.
- Reputation systems could be a force for renewal and expansion for many sectors, as workers previously excluded by credentialing processes—and sometimes by bias—are brought into the fold and contribute new ideas and thinking to their fields.

### Timing

- **Stage:** Emergent, though rudimentary systems are already in use
- **Speed:** Rapid growth, fueled by ever-expanding data collection and analysis

### Potential Alternative Futures

- **Algorithmic discrimination:** Automated systems hard-coded with (mostly inadvertent) biases lead to reputation systems corroded by prejudice.
- **No longer trustworthy:** Users with ratings fatigue, and those seeking to game the system for their own benefit, undermine a central draw of these systems: a kind of objectivity.
- **All about the game:** The desire for a perfect reputation score shifts the focus of work (and sometimes other parts of life) from enjoyment and satisfaction to point-scoring.
- **HR redefined:** A move to automated hiring realigns HR priorities to workplace behavior.



## Take Action

- **Explore new ways to validate experience and competency.** Credentialing programs often rely on self-generated evidence to establish work experience. Reputation systems could support tracking and validating learning experiences and demonstrated competencies. Associations with restrictive membership requirements also might turn to reputation systems. Associations may decide they need to build and control these systems rather than cede this role to third-party sources.
- **Give people the training and tools to manage their reputations.** People build their reputations over time through career and professional development. Associations can teach people how to build and protect their careers in a future that offers more ways to score reputation by the numbers.
- **Find new talent for volunteer and leadership jobs.** Most associations have volunteer jobs that are hard to fill, so they end up recycling the same people as leaders and subject matter experts. Reputation systems could give associations a new tool to discover talent in unexpected places.
- **Evolve member engagement systems into reputation builders.** The kind of transactional information member engagement systems capture also may be indicators of reputation. Associations might explore how to link these purposes and relate the metrics for engagement to reputation.
- **Guard against unintentional bias.** Algorithms and data modeling rely on assumptions. Without taking great care, organizations could simply end up quantifying subjective judgments that reflect existing patterns of discrimination and exclusion. Reputation systems that attempt to reduce people's attributes and contributions to numbers could intentionally bar people for unjust reasons. Moreover, important soft skills like emotional intelligence are harder to quantify.

## Keyword Search

To continue researching this change driver, use these search terms:

*credentials, alternative credentials, reputation systems, human resources, scoring systems, big data, data mining, data analytics, licenses, licensing, talent management systems*

### Who Will Be Affected

Any organization that fosters or uses reputation will want this capability. Credentialing organizations have to consider the strategic implications. Customer service organizations will use these systems to identify and reward preferred customers. An array of software providers may have to consider how to incorporate reputation by the numbers into managing members, volunteers, human resources, content, and speakers.

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# Re-Working Career Pathways

**SUMMARY:** The idea that the course of people's professional lives is settled in their twenties is long-outmoded, but employers and life structures have been slow to adapt to this fact. However, organizations are increasingly assisting workers with midlife transitions, such as going back to school, enhancing skills for new career directions, or allowing for reduced hours so that employees can pursue other interests. Such steps create a need to rethink work, education, and social safety nets to accommodate new approaches.

## Forecasts

- "Careers for life" may begin to give way to "careers for life stage" as workers and employers realize that time in a job or industry is a finite thing due to changing skills, interests, technologies, and market needs.
- New resources and structures will be needed to support a workforce that retrain or shifts careers regularly. These could range from mid-career use of social safety net funds to rethinking the roles of universities, community colleges, and technical schools.
- Mid-career shifts could help combat workplace ageism as workers retrain and move to jobs where they have interests, rather than lingering in jobs where their skills become obsolete.
- While this change is emerging slowly, it could become supercharged in the medium term by a workforce with generally looser ties or allegiances to organizations than in the past.

## Key Uncertainties

*Whether evolving views are tied to generation, life stage, or some combination thereof*

•

*Evolution of institutions to support midlife shifts*

•

*Older millennials and their approach to midlife*

•

*In the United States, whether health insurance continues to be tightly coupled to work*

•

*Shifting gender roles vis-à-vis work and family*

•

*Whether midlife career transitions are primarily for elite workers*



## Supporting Trends

- **Support organizations.** New organizations are emerging to support workers in mid-career shifts in business and volunteer work.
- **Growth of the blended workforce.** Workforces that “blend” conventional and freelance workers are spreading. A survey found that 93 percent of companies are using a blended workforce.
- **Rapid changes in work.** Rapid changes in work and work skills are forecast by experts and expected by workers due to technological and market forces.
- **Engagement in the workplace.** U.S. workforce levels of engagement—which are tied to work satisfaction and commitment—are rising slowly, from about 30 percent in 2014 to about 35 percent in 2017, with ongoing oscillations.
- **Workforce skills gap.** The U.S. economy has a growing “skills gap” between the skills being demanded by employers and the skills the workforce can provide.

### Related Drivers of Change

- 21st-Century Guilds
- Work Redefined
- The Next-Gen Professionals
- Aging World
- Bifurcated Workforce

## Notable Data Points

### MINDING THE GAP

**39% of U.S. employers report difficulty filling jobs**  
due to a lack of available talent.

*Source: Bureau of Labor Statistics, 2016 Job Openings and Labor Turnover Survey*

### STARTUPS: AN OLDER PERSON'S GAME

**The average age of startup founders is nearly 42**  
and, among the startups with highest growth,  
the **average age of founders is 45.**

*Source: The National Bureau of Economic Research, Age and High-Growth Entrepreneurship*

### MILLENNIALS THE LARGEST GENERATION

In 2016,  
**millennials became America's largest living generation,**  
surpassing boomers (74.9 million)  
as they reached 75.4 million.

*Source: Pew Research Center*





## Strategic Insights

- The institutions—social, educational, financial—needed to support mid-career shifts are currently lacking or rudimentary at best. This provides associations with a tremendous opportunity to provide some of this support.
- Associations could ally with organizations—such as the Distinguished Careers Institute or the Transition Network—that have sprung up to assist people with midlife transition and career issues.
- Currently, expectations and career structures generally link career stage with life stage. Going forward, there will be a need to rethink the mechanisms that enable and support career shifts—school loans, retirement plans, healthcare—and to uncouple these mechanisms from age so that mid-career shifts can be realized.
- Since the boundaries of industries and professions are becoming more permeable, the associations that support them will need to as well.
- A culture that gives more permission for mid-career shifts could be a boon for midlife workers starting out from a non-professional background, transitioning from full-time parenthood, etc.
- As older workers shift into early career jobs in new fields, there will be a reversal of the mentor/mentee paradigm—at least regarding age—with younger, more experienced workers mentoring older, less experienced ones. There is a role for associations in helping to derive appropriate training and best practices that mitigate any age-based conflict that could arise from this reversal.
- New flexibility around full-time vs. part-time and around breaks in work for retraining or pursuing other priorities will be needed as mid-career shifts are pursued.

### Timing

- **Stage:** Recently emergent and beginning to grow.
- **Speed:** This idea is developing slowly but, depending on millennials' work patterns as they mature, could rapidly accelerate.

### Potential Alternative Futures

- **Freelance world:** The idea of set career paths dissolves in the face of the gig economy.
- **(Career) path dependency:** The current structures that define and support work may be too slow to change—or even actively hostile toward it—to allow mid-career shifts to ramp up.
- **It's great if you can afford it:** Without social and financial support, mid-career shifts are limited to those who can afford them, creating a bifurcated workforce of those who are happy with their jobs and those who are stuck in an ill-matched career.



## Take Action

- **Investigate the interaction of career pathways and life stages in your association.**  
In some fields, the time and preparation required for entry mean that professionals will have to wait until later life stages before their careers take off. Some careers rarely attract people out of college. Other fields regularly lose people at some key stage. Associations need a textured understanding of career pathways to effectively serve members.
- **Champion flexibility to support career changers.** Associations can lower the barriers to entry for career changers. Prior experience can be honored and used to accelerate people through preparation and credentialing. Associations can work to alter cultural expectations by recognizing and applauding non-traditional career paths and increasing online education opportunities that help members fit learning into their work lives. Leaders can advocate for changes in employee benefits and other institutions that make a career redirect possible.
- **Provide an introduction to potential careers.** Membership can be promoted as a way to test drive new careers before making the switch. Associations also could offer introductory courses that provide an overview of the knowledge and skills required and the opportunities available.
- **Help your members plan for aging within their careers.** This may be as simple as helping them keep their skills current or introducing them to alternatives like consulting or businesses they might create. Or the association may find it needs to champion working conditions that keep jobs attractive to people as they navigate different life stages.
- **Promote your association's employment opportunities for career changers.**  
Associations and nonprofits are attractive places to experience second or third careers. People come with specialty knowledge or an avocation for the field and then learn association management on the job. Associations can also encourage career exploration and offer support for additional training for employees who want to shift roles within the association. Associations can recruit great employees if they are willing to train them.

## Keyword Search

To continue researching this change driver, use combinations of these search terms:

*midlife, career-shift, returnships, career re-entry, resources for older workers, middle-aged, career, work*

### Who Will Be Affected

Associations with members in jobs that do not offer a work-life balance or support the demands of different life stages will have a larger number of career changers. All associations, including trade and business associations, need an intimate understanding of their field's career pathways and how the association can attract and serve people ready for a change. Associations typically hire many individuals and career changers who are attracted to the purpose and professional growth available in association management.

### About ASAE ForesightWorks

ASAE ForesightWorks is a deliberate, evidence-based research program and emerging line of products to provide association professionals with a *continual* stream of intelligence about the changes facing the association industry, including:

- regularly updated action briefs;
- tools for applying insights from the research in your association;
- guidance in performing environmental scans; and
- opportunities to engage with peers around the research.

Ultimately, the program's mission is to empower association leaders to create a culture of foresight in their associations and to lead their organizations confidently into the future.

Check [asaecenter.org/ForesightWorks](http://asaecenter.org/ForesightWorks) and follow @ASAEfdn on Twitter for updates on new findings and events.



# Work Redefined

**SUMMARY:** A variety of driving forces are redefining the boundaries and nature of work and jobs in fundamental ways. New employment and workplace systems, educational systems, and social safety net systems will need to rise to meet emerging needs.

## Forecasts

- Automation, temporary work, and new economic realities will endanger the traditional 40-hour job.
- Work will be less confined to traditional working hours and workplaces.
- Education, work, and leisure will no longer be sequential life events, but will be pursued continuously throughout the lifespan.
- Automation will drive workers to designing, marketing, and selling rather than producing.
- Organizations will continue to flatten, shifting from ladder to lattice structures, enabling collaboration.
- More work will shift from jobs with titles to getting a project done and moving on.
- In some locales, the loss of traditional jobs will harm cultural cohesion and civic spirit.
- More workers will retire later, and gradually.



## Key Uncertainties

*Extent to which automation creates jobs, destroys jobs, and enhances existing jobs*

•

*State of the economy*

•

*Societal recognition of traditionally unpaid work, e.g., childcare and elder care*

•

*Methods for delivering the non-monetary benefits of work to individuals who don't have a job*

•

*Future of the social safety net and retirement structures*

•

*Future of migration*



## Supporting Trends

- **Virtual reality growth.** Virtual reality has hit the mainstream, and will grow as an entertainment and communication platform.
- **Declining U.S. workforce participation.** America's workforce participation rate continues to fall.
- **Growing freelance workforce.** More than one third of the U.S. workforce was freelancing in 2014.
- **Human-machine hybrid work.** As intelligent systems permeate the work world, semi-autonomous systems that collaborate with humans—rather than fully autonomous systems—may become more prevalent.
- **Emotional intelligence in the age of AI.** In the age of artificial intelligence, humans will remain relevant not by knowing but by thinking, listening, relating, and collaborating at the highest level.
- **Job polarization.** High-skill and low-skill jobs are increasing, while middle-skill jobs decline.
- **Growing role for retraining and continuing education.** Interest in continuing education, lifelong learning, and worker retraining is growing, though benefits may be greater for those already employed than for displaced workers.
- **Universal basic income.** More governments are experimenting with providing a universal basic income to their citizens.

### Related Drivers of Change

- Automating Work
- Bifurcated Workforce
- Mentoring 2.0
- Human-Machine Cooperation
- Higher Education 3.0
- Microlearning

## Notable Data Points

### JOB MARKET POLARIZATION

Between 2007 and 2014,  
**high-skill occupations**  
**grew 1.2% per year,**  
middle-skill declined 1.3% per year, and  
**low-skill grew 1 % per year.**

Source: Federal Reserve Bank of St. Louis, Economic Synopses

### WORKFORCE PARTICIPATION

In 2016, the U.S. civilian workforce-  
participation rate  
**dropped to 63%,**  
the lowest level in nearly 30 years.

Source: U.S. Department of Labor Bureau of Labor Statistics

### JOB HOPPING

In the last 20 years,  
**the number of companies**  
**people worked for**  
in the five years after they graduated  
**has nearly doubled.**

Source: LinkedIn



## Strategic Insights

- Ongoing workplace shifts will heighten the emphasis on, and demand for, lifelong learning. Workers will need to continuously reinvent themselves as their environment changes rapidly.
- Associations can help organizational members share best practices for restructuring to function optimally in the new world of work; they can help individual members discover and pursue nontraditional career paths.
- As the roles of traditional members shift (and, perhaps, their numbers shrink), the association membership base may need to broaden in these ways:
  - o Beyond core members to include those in related fields.
  - o Beyond career professionals to those with other levels of interest and career involvement.
- Associations will need to find ways—e.g., through mentoring or small-group processes—to assist members to find satisfaction and meaning in a work environment where traditional jobs are hard to find.
- Associations may want to advocate for new work categories—e.g., a worker category between independent contractor and employee—and for social safety-net systems better aligned with the new forms of work.

### Timing

- **Stage:** Emerging developments and weak signals of change
- **Speed:** Moderate rate of change that might be approaching tipping points

### Potential Alternative Futures

- **Sharing the (lighter) load:** Working hours fall for everyone as remaining work is distributed more evenly among workers.
- **The working elite:** Having a job becomes a special status. The top 10 percent of workers are the only ones with “real” (traditional) jobs.
- **Universal basic income:** Trial programs that provide a basic income for all succeed and expand.
- **Purpose without jobs:** Workers without traditional jobs struggle to find a sense of purpose; some succeed by entrepreneurship, by participating in the artisan economy, or by finding a personal calling.





## Take Action

- **Help members navigate changing career pathways.** Professional associations know what the competencies and career pathways are for their members. Trade associations can help member companies with workforce development and retraining initiatives. Don't ignore the needs of older entry-level or career-changing members. Association leaders rising through more traditional routes may fail to see or understand the needs of people with alternative career experiences.
- **Ethically manage your workforce supply.** Discourage colleges and preparatory programs from over-producing and over-promising opportunities that may not exist. When widespread retraining is required, offer members accessible and affordable options to ensure their continued employability.
- **Defend your members' quality of work and life.** With many people expected to do more and work longer hours, some associations may need to speak out for reasonable work expectations to ensure health, safety, and quality performance. Offer training in life skills and collaborative forums where people can share their coping strategies.
- **Ease the transition for people redefining their work.** Associations can show their loyalty to members in career transition by waiving or reducing membership dues and registration fees, offering career counseling and resources, and supporting their need to network.
- **Set on-call boundaries for your association staff.** Work and life are no longer neatly compartmentalized. Many association executives are self-directed and work long hours to meet expectations at the expense of their personal and family life. They can feel they are always on.
- **Embrace remote workers.** If your association still resists hiring remote workers, you may miss out on some very talented people who might gladly join your team.

## Keyword Search

To continue researching this change driver, use these search terms:

*work automation, flexible work, gig economy, temporary work, e-lancing, underemployment, services industry, basic income, job guarantee, new union models*  
MEETING TERMS: *event, meeting, conference*

### Who Will Be Affected

All associations, industries, and professions need to know how work is being redefined in their sphere. Small associations may be able to secure the talent they need if they are flexible about how work is structured and where and when people work.

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