



I.D.E.A.S.

VOLUME TWO

**Innovation, Developments, Examples, Advances,
Standards in Association Governance
and Management**

By Octavio “Bobby” Peralta

Prologue

Dear Reader,

I wish to present to you this collection of short articles written by me and three other good-natured people – Arianna Rehak, Bojan Tercon and Doris Dumlao – who share my passion about associations and the good things they do for society and country.

I myself came into the association world unexpectedly. I was a mechanical engineer by education, a development banker by training, and an association executive “by fate.” I consider myself truly blessed by this career and life transformation. 27 years on and counting, I still “breathe and live associations” on a daily basis.

I was not alone though in this wonderful journey. I share this with many people and institutions close to me, have met, and worked with. There’s my supportive family who at first I had difficulty explaining my job to as an ‘association man’. Then there’s the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP) which provided me the ‘hands-on’ experience of managing an association, and the American Society of Association Executives (ASAE) which gave me the ‘toolkit’ to do it well. And there’s the Philippine Council of Associations and Association Executives (PCAEE) which I co-founded as a way of “giving back” to a profession I dearly love. PCAEE exists because of the backing of the Philippine Tourism Promotions Board, the Philippine International Convention Center, the Center for International Private Enterprise, and ADFIAP.

This publication, which covers this journey, also provides a glimpse of other associations elsewhere, and ideas for best practice. It would not have been made possible without the support of the PCAEE Board of Trustees and Secretariat, the Philippine Business Mirror, a news daily where I write a weekly column, thanks to its chief editors, Chay Fernandez and Jun Vallecera, Writers Edge’s Sheila Samonte-Pesayco who edits my articles, and AssociationSuccess.org’s Arianna Rehak, Lucie Robathan, and team for the editing, design and layout of this publication. I thank them all.

I hope you find this piece of curated work a worthwhile read.

My best,
Octavio ‘Bobby’ Peralta

Foreward

I was lucky enough to come across Octavio “Bobby” Peralta’s wonderful mind through his blog, and after reaching out to him about the possibility of publishing his thoughts, now enjoy an extremely rewarding collaborative relationship with the Philippines’ own Association Man.

Bobby is a constant source of insight, passion, and energy. His prolific thought leadership has changed the landscape of the association industry in Asia, and his ingenuity continues to inspire me, and our own efforts at AssociationSuccess.org.

His journey through the association space offers valuable information and sage stories both for people and communities new to the industry, and for established executives looking to inject their work with a fresh and deeply engaged perspective.

It has been a joy to collaborate on the creation of this book. We hope that it can serve as a trusted handbook for association professionals on any rung of their career ladder.

Arianna Rehak
Director of AssociationSuccess.org

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Chapter 1: Start of a Journey

This chapter features a series of guest pieces, as well as my own thoughts, to paint you a broad picture of the development and growth of a thriving association industry in the Philippines.

The Association Movement in the Philippines ***Guest piece: Arianna Rehak***

I recently returned from the Philippines, where I found myself immersed in an emerging market. I was staying in the Bonifacio Global City (BGC), a new business district in Manila. Every single building in the vicinity was less than ten years old, and the sky held as many cranes as buildings. Traffic is what you would expect from a city experiencing rapid growth; everyone waits for their turn to enter the metropolitan area and engage in the ever expanding commercial opportunities.

I was in Manila presenting with the Philippines Council of Associations and Association Executives, which gave me the opportunity to learn about the local association landscape. Filipino associations exist in the thousands, and the vast majority are run by volunteers.

I was particularly impressed by the work PCAAE volunteers do to keep their organization booming. As I presented, several of them were working to meet deadlines. Imagine. As a *volunteer* team, they are successfully putting out a physical publication called, "Association World", maintaining a website, planning out a day-long seminar once a month, organizing an annual conference, and so much more.

It has been a fast-paced four-year journey for PCAAE since its inception in November 2013 when the Philippines Tourism Promotions Board, the Philippines International Convention Center, and the Association of Development Financing Institutions in Asia and the Pacific got together and formally launched PCAAE with the support of ASAE.

The powerhouse behind PCAAE is CEO, co-founder and President Octavio "Bobby" Peralta. Bobby became an association executive by chance in 1991 after a 15-year banking career. When he searched for association management resources in the Philippines and came up blank, he looked to the global market and joined ASAE.

It broadened his skills, knowledge, and perspective on the association world, assets he now shares with his local working community. Bobby's dream is to bring a sophisticated understanding of association management to his member organizations, and his relentless efforts have earned him the nickname, 'The Association Man'.

PCAAE aims to be an active supporter and participant in the ever-growing association community in the Asia-Pacific region as well as the global association community. Bobby has big plans for the future. With the support of ASAE, he initiated the setting up of the Asia-Pacific Federation of Association Organizations (APFAO) in March 2015, with PCAAE, the Associations Forum, the Australasian Society of Association

Executives and the Korean Society of Association Executives as founding members.

I left Manila feeling inspired by the work I saw and optimistic of the ever-increasing role that associations are playing for the betterment of our truly global society.

Starting an Association of Association Executives in the Philippines ***Guest piece: Bojan Tercon***

Throughout his long career, Octavio ‘Bobby’ Peralta, secretary general of the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP), has held a strong interest in association leadership and governance.

Thus, the idea of promoting and encouraging a national version of the American Society of Association Executives (ASAE) in his region has been top of mind for him for many years. Initially, he considered creating a Pan-Asian association of executives, but starting so big proved too much of a challenge. Instead, he decided to begin an organization in the Philippines.

When the Philippines Tourism Promotions Board (TPB) approached ADFIAP a couple of years ago, the two organizations started discussions on how to form a national ASAE-type institution. This led to the registering of the Philippine Council for the Advancement of Association Executives (PCAA).

Over the next two years, ADFIAP supported PCAA’s launch until the new organization was able stand on its own with an independent secretariat and management.

“The current Filipino government is very much focused on promoting tourism in the country through PCAA,” Peralta says. “TPB claims that if they develop the association landscape and have a network of associations in the Philippines, then there is a good chance that these associations will draw meetings and conventions to Manila. From the perspective of ADFIAP, though, we’re more interested in promoting good governance and good association leadership.”

PCAA was officially launched on November 20, 2013, during the first Association Executives Summit in Manila. That was followed by a very successful General Council of Members Meeting on January 30, 2014, where the founding members took their oath of membership and where six working sectors mapped out their respective plans and programs for 2014.

ASAE and the Center for International Private Enterprise (CIPE), both based in Washington, DC, together with TPB, the Philippine International Convention Center, and ADFIAP are the “Founding Pillars” of PCAA. Together they are lining up grant projects, potentially for the ASAE Foundation and CIPE, for training events. They also have several concepts to run train-the-trainer programs for association executives. Training and capacity building are crucial elements in the initial startup phase of PCAA.

PCAA has also compiled a database of about 150 members who will receive ASAE’s *Associations Now Daily News* email. “ASAE’s support in providing online

publications and training courses is a critical component of PCAAE's technology-driven model of servicing its members," Peralta says. "It is not only in real time but also environmentally friendly."

Peralta is a firm believer that there is a great need for professionalism in the association management field in the Philippines and the region. Management and governance should be kept separate. The board should set direction and policies and management should be implementing the policies. "Hopefully in the Philippines there will soon be a profession like an association executive similar to what you have in the United States," he says.

Professionalizing association executives in the Philippines

Guest piece: Doris C. Dumlao

It's one profession that children are not likely to think of when asked what they want to be when they grow up.

Despite the crucial role they play in modern society, even adults probably won't look at it as their ultimate career goal.

Those who eventually take this role – at least in the local context – usually end up in the position either by sheer coincidence or as an extension of their previous career path.

We're talking about association executives – those who manage membership associations, whether they be engaged in a common trade, profession or advocacy work.

They take care of the day-to-day needs of the members, organize their seminars and other events or act as a lobby group. Their operations are mostly funded by members, whether individuals or institutions. There are groups of bankers, exporters, treasurers, franchisers, athletes, artists, artisans, publishers, expatriates, car dealers, advertisers, finance executives, for example.

And the backbone of each association is the secretariat, comprised of people managed by these unheralded association executives.

"Managing an association or a chamber or any membership association isn't easy," says Octavio 'Bobby' Peralta, secretary-general of the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP). Each association is likened to a "little democracy," with members as the citizens who have voting powers and who elect their leaders and try to influence policy-making.

But compared to the big task of managing such associations, these executives typically have no training and just learn on the job once put into this position, Peralta says, citing his own experience in ADFIAP.

He is a mechanical engineer by training who worked as a banker at the state-owned Development Bank of the Philippines. He learned about running an association, which is different from the corporate setting, along the way.

Of course it helped that he was a former banker, given the membership that he handles.

Makati-based ADFIAP, as its name implies, is an organization of development financing institutions like DBP with 120 development banks in 42 countries and territories as members.

Because good governance is part of its advocacy, ADFIAP's board supported the incorporation late last year of the Philippine Council for the Advancement of Association Executives (PCAEE) Inc. (www.pcaee.org), a network of professionals and institutions that manage and help sustain associations and other non-profit membership organizations involved in business, trade, philanthropic, scientific, medical, educational, technical, social welfare, agricultural and related activities.

While still in its infancy, PCAEE is envisioned to become an independent institution over the long run. With ADFIAP as the network's incubator, Peralta acts as the founding chair of PCAEE. The network aims to engage with policy-makers, the academe, media and the public-at-large in its belief that cooperation and alliances bring forth more meaningful outcomes.

Beyond the Philippines, the dream is to have a pan-Pacific umbrella organization for such association executives, Peralta says. However, there are few such organizations in the region to date. Even South Korea and China are just starting to put up such national associations.

Over the long run, institutionalizing training, benchmarking and licensing of these executives is envisioned in this part of the world, tracking existing practices in the United States and Europe.

Citing Securities and Exchange Commission records, Peralta says there are more than 5,000 registered associations in the Philippines.

The figure does not even include homeowners associations or groups covered by other regulatory bodies, like tricycle drivers associations or informal grassroots organizations based in barrios or towns. "There's a big opportunity for group like this to learn from each other and really professionalize the work of an association executive," Peralta says.

It's written into the DNA of PCAEE to provide opportunities for the exchange of expertise, experiences and opinions through meetings, communications, education, reserve and publications for non-profit organization management professionals.

By linking up all these associations, Peralta says the potential for sharing of best practices is great. For instance, one group which is very good in fund-raising or retailing or communications can share its expertise with others.

As the umbrella group, PCAEE can also provide a venue for fledgling associations to learn basic skills in managing the association, like publishing a newsletter, writing a news release, planning corporate social responsibility projects or even performing backroom operations like accounting, budgeting and auditing. Likewise part of PCAEE's objectives

as specified in its charter is to conduct competitions and award outstanding non-profit organizations in management achievement.

It thus seeks to develop and encourage high standards of professional conduct among non-profit organization management professionals.

As a group, PCAAE vows to advocate for fair and appropriate treatment of non-profit organization management professionals and non-profit organizations before national and local governments.

For ADFIAP, the most compelling argument for the creation of PCAAE is to strengthen the governance of these association executives.

Like having separation of powers alongside checks and balance among the branches of government, Peralta says there is a need to uphold the independence of the secretariat from the board, which should otherwise just focus on its oversight functions and lead the association into its strategic direction.

PCAAE is open to different types of membership: individuals working in associations, chambers and non-profit organizations and partner organizations or institutions that share its advocacy to professionalize the work of an association executive.

PCAAE's annual conventions offer the opportunity to hone this professionalization further, with the help of foreign and local experts. "This is continuing education that schools can't provide. In our case, there's no course that can lead you to be an association manager," Peralta says.

Confessions from an 'Association Man' – Part One

While many people know what associations are, many are also unfamiliar with the inner workings of associations: how they are governed and managed, and what they contribute to society.

In the United States and Europe, there is such a profession as an "association executive." No such profession exists in the Philippines, at least neither a recognized one nor called as such. Parents, for instance, will not tell their children to be an association executive someday nor would children know that there is such a career as a professional association manager.

Most associations and membership organizations in the Philippines are both governed and managed by elected volunteers that constitute a Board of Trustees. Quite different in the western world, associations are governed and managed like corporations; there is a volunteer board that governs (i.e., sets strategic directions, formulates policies and provides oversight) and a separate management team led by a salaried chief executive that manages the day-to-day operations of the association.

I know this situation quite well, having been an association executive myself for the past 25 years (and counting). Like many of those working in associations today, one is either there by "accident" or as a "retirement job." I belong to the former.

I took up a mechanical engineering course in college, then a post-graduate management course; worked as a lending officer in a state-owned development bank for 15 years; and was suddenly “thrust” to manage an association of development banks in Asia and the Pacific where I am currently the chief executive, heading 12 staff.

Clueless as to how to manage an association, my first instinct was to search for training programs and publications on association management. Having found none, I joined the Washington, D.C.-based American Society of Association Executives (ASAE), which opened my mind and heart into the world of professional association governance and management. The 90-year-old ASAE currently has more than 21,000 members in over 50 countries, with a certified association executive program, among others.

In the US, certified association professionals get compensation that is 30-percent more than their noncertified counterparts, while a chief executive can earn six-figure annual salaries working for multimillion-dollar budgeted associations.

With this in mind and equipped with the knowledge I have acquired over many years of association management experience, plus being exposed to a global network of association contacts, I pursued my long-time dream and advocacy to further professionalize association governance and management in our country.

In November 2013, with the support of the Tourism Promotions Board (TPB), the Philippine International Convention Center (PICC) and my organization, the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP), a few friends and I founded and launched the Philippine Council of Associations and Association Executives (PCAEE).

PCAEE’s mission is to advance and sustain the work and advocacies of associations and other membership organizations (e.g., chambers, societies, cooperatives, unions, clubs) in building human-resource capacities through practical educational programs and knowledge resources not available in schools and elsewhere. It also aims to set industry standards and policy guidelines for associations, and serve their members and constituencies to further professionalize their ranks, among other contributions to society.

As I write this very first column, I am involved in at least four associations, both local and international, including the recently launched Asia-Pacific Federation of Association Organizations. This is the reason my wife affectionately calls me the ‘Association Man’ (inspired by Marvel’s *Ant Man*).

As experience tells me, being a professional association manager is, after all, exciting, fulfilling, globe-trotting, and makes for good living! Thanks to the Business Mirror, the story of associations, and insights into their fascinating world, will now reach the consciousness of the public.

Confessions from an 'Association Man' – Part Two

Managing an existing association is challenging enough, what more when starting a new one, an 'association of associations' at that! This is the story of the Philippine Council of Associations and Association Executives (PCAAE).

In primary school, our teachers told us about the 3R's in education – reading, (w)riting and (a)rithmetic. In association building, there are also 3R's to a successful start as what you will learn from this article.

The PCAAE 'story' began years back with an aspirational idea of mine to “give back” to the association community that has been my source of living, knowledge and many friends around the world. After all, though educated as a mechanical engineer, then pursuing a development banking career and later on becoming an association executive 'by accident', I believed that associations play a vital role in nation-building.

This role comes in the form of, among others, providing specialized educational programs that are not available in schools and elsewhere, setting industry standards and guidelines, helping government in policy formulation for specific industries to improve production efficiency and exports as well as serving the economic, social and environmental needs of a diverse constituency in urban and rural areas.

As Secretary General of the Association of Development Financing Institutions in Asia & the Pacific (ADFIAP), I have developed over a course of 25 years, an international network of friends and allies in the association and MICE (meetings, incentives, conferences and events) worlds. I have also been a long-time member of the Washington, D.C.-based, 21,000-member, 90-year old, American Society of Association Executives (ASAE) which also bolstered my confidence to take a crack at forming PCAAE. But there were elements of serendipity and luck as well along the way.

At the IMEX 2010 in Frankfurt, I unexpectedly bumped into the General Manager of the Philippine International Convention Center (PICC), Atty. Rene Padilla, who, it turned out, was also thinking of creating a society of association executives in the Philippines. The following year, also at IMEX Frankfurt, my colleague at ADFIAP, Ms. Cora Conde, met Ms. Stanie Soriano, then head of the MICE department of the Tourism Promotions Board, the marketing arm of our Department of Tourism and further discussed the possibility of setting up an 'association of associations' in the country.

After several more meetings, an agreement was made by TPB, PICC and ADFIAP to form the PCAAE. With their help and those of my friends, who voluntarily shelled our money from their own wallets for legal documentation, the PCAAE was finally registered in October 2013 as a non-profit organization with the Securities and Exchange Commission.

The creation of PCAAE was thus sealed and made possible with the support of three organizations with the same goal and advocacy. TPB provided financial support, PICC had offered its facility for use and ADFIAP acted as the PCAAE secretariat. On November 20, 2013 at the 1st Association Executives Summit held at the PICC Manila, the PCAAE was officially launched, participated by over 200 founding members from 72 associations and other membership organizations nation-wide. ASAE and another Washington, D.C.-

based organization, the Center for International Private Enterprise (CIPE), which provided technical assistance, completed the five “founding pillars” of the PCAAE.

The building of PCAAE can thus be summarized into the following:

1. *A spark can light a fire* – One idea can certainly come into fruition if a group of like-minded and passionate individuals and institutions come together, support one another, and make it work.
2. *3R's in association-building* – Relevance, relationships and resources are three key ingredients needed to start an association. Relevance comes in the form of a clear purpose, mission and vision. Building and nurturing relationships will come a long way in this process, and resources, both human and financial capital, are required to effectively and efficiently put ideas into action.
3. *Associations are converging in today's 'sharing economy'* – In an environment where cooperation and collaboration are mainstream, associations and other membership organizations are more than ever sharing and networking for a common good and enduring sustainability.

Chapter 2: Associations elsewhere...

Association of associations

The Asia-Pacific region is ever abuzz with activities, and one of them pertains to the association community.

Prior to 2013, when the Philippine Council of Associations and Association Executives (PCAAE) was founded, there were only two “association of associations” in the region, both based in Australia: the Associations Forum (AF) and the Australasian Society of Association Executives (AuSAE). In 2015 there were four, with the addition of the Korean Society of Association Executives (KSAE). To date, the Malaysian Society of Association Executives (MSAE) is in the last stages of government registration. Japan has started organizing an association forum, Thailand is mulling over an association hub, while Taiwan and Singapore have expressed interest in a similar initiative.

For the Philippines, Malaysia, Thailand, Taiwan, and to a certain extent, Japan, the prime movers of putting together and supporting associations are the country's convention and visitors' bureaus or their national tourism organizations. The rationale for government-run tourism agencies is obvious. According to surveys, attendees of meetings, conferences and trade exhibitions spend at least three times more than leisure tourists. And associations are the largest groups that organize business events, conference and trade exhibitions.

Such was the case when the PCAAE was founded in November 2013. It was through the collaboration of three institutions – the Tourism Promotions Board (TPB), the Philippine International Convention Center (PICC) and the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP) – that the PCAAE came into being.

The motivations of these three collaborators matched their respective objectives. Having an “association of associations” in PCAAE, the TPB will have a collective group that will work together to bring into the country more international events to boost tourism intake. PICC will have an opportunity to promote its venue and catering facilities to more association events. ADFIAP will be able to further advance its advocacy for professional association management and good governance practices in associations.

In March 2015, with PCAAE leading the way, the Asia-Pacific Federation of Association Organizations (APFAO) was established during the American Society of Association Executives (ASAE) Asia-Pacific conference on association management in Hong Kong. The four founding APFAO members – the PCAAE, KSAE, AuSAE and AF – signed the “Hong Kong Charter” firming up the cooperation among the region’s “national associations of associations” on information and knowledge exchange, peer-to-peer networking and program synergies.

The APFAO is on its way to increasing its members and stakeholders. With Malaysia, Thailand, Taiwan and Japan on the verge of having their own “association of associations,” expect a more dynamic association community, as well as a vibrant business event scene, in the Asia-Pacific region in the years ahead.

Union of International Associations

The Union of International Associations (UIA) has been in existence for 110 years but I only found out about it a few years ago when it requested our organization, the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP), to be listed in its directory of international associations around the world.

The Brussels-based UIA is a research institute and documentation center founded in 1907 by Henri La Fontaine, a Nobel Peace Prize laureate and Paul Otlet, the founding father of information science. UIA is not-for-profit, apolitical, independent and non-governmental organization (NGO) and has been a pioneer in the research, monitoring and provision of information on international organizations, international associations and their global challenges.

One of UIA’s enduring services to the association world is its yearbook of international organizations with detailed information on over 37,000 active and 32,000 dormant international organizations from 300 countries and territories, including intergovernmental and international NG. It also lists over 20,000 associations and other membership organizations worldwide. Available both in print and online versions, the printed version that consists of seven sets of thick, hardbound volumes find its way to libraries in the US and other countries.

ADFIAP is honoured to be admitted as a member in active status with the UIA two years ago. This led to an invitation in September last year to be a speaker on association governance and management at UIA’s Associations Roundtable Asia Pacific in Busan, South Korea, attended by over 100 delegates from 80 organizations in 20 countries. This learning and networking program that UIA runs annually in the region is a must-attend event for association professionals, aiming to further their knowledge and contacts. This year the

Asia-Pacific Roundtable will be in Chiang Mai, Thailand, on September 21 and 22.

I had the fortunate opportunity to visit the UIA Brussels headquarters recently after attending an ADFIAP co-organized sustainable finance conference in Karlsruhe, Germany. There, I met with the UIA management and brainstormed on potential cooperation and was later hosted to meet some of its member-association executives whom I am now in contact with for possible collaborative projects.

The reason I am featuring UIA in this column is because of its unique work and advocacy for and in behalf of the global association community in terms of information and educational value. Associations here in the Philippines can learn from the various resources that UIA has produced over the years and know that opportunities and challenges of associations around the world are similar in many aspects. Associations here can also understand that one of the keys to success is that of knowing what's out there in terms of content, experience and partnership possibilities. After all, associations need not reinvent the wheel, so to speak, to achieve their purpose and further their mission.

Associations in Malaysia

Upon invitation by the Malaysia Convention and Exhibition Bureau (MyCEB), I spoke about association transformation and leadership at the 3rd Malaysian Association Next (MyNext) conference on September 14, in Petaling Jaya, Kuala Lumpur. MyNext is an annual gathering of Malaysian association leaders and professionals to access and exchange cutting-edge insights and ideas, as well as network with each other on issues that impact the future growth and sustainability of associations in the country.

The event was also an occasion to officially launch the Malaysian Society of Association Executives (MSAE), which is of the same mould, so to speak, of our own Philippine Council of Associations and Association Executives (PCAEE).

MyNext is part of MyCEB's "Association Development Programme", a range of training initiatives to promote professional development of associations in Malaysia. The program aims to build capacities and confidence of associations in attracting international conventions to Malaysia. Benefits from this initiative include showcasing local innovation and expertise to the world, knowledge sharing, building international networks and business prospects.

The MyNext association conference was held on the heels of the 3-day "Malaysia Business Events Week" that ran from September 11 to 13 on the same venue. Themed "*Our Future by Design: Accelerating Transformation*", the event was a platform for all stakeholders of the business events industry in Malaysia to converge, communicate and deliberate on issues that have relevance to their industry.

All these programs and initiatives are under the framework of MyCEB's "Malaysia's Business Events Roadmap: Charting Malaysia's Journey to 2020 and Beyond" that aims to power the country's knowledge and creative economy and lay the groundwork, setting up and management of all the platforms for collaboration.

It was also meant to support the development of strong local business events

hosts, such as associations, convention and exhibition organizers and suppliers and other stakeholders in the business-event industry to become strong advocates of the needs of the business events sector.

Through these collaboration efforts between the government and the business-event industry, MyCEB hopes to be in a better position to contribute to the achievement of the nation's 2020 goals under its "Economic Transformation Programme": to be among the top 5 destinations for international conventions in the Asia-Pacific region and to attract 2.9 million business events visitors which make up about 8 percent of total international visitors to Malaysia.

The role of associations in tourism cannot be discounted and, in fact, should be strengthened. Furthermore, the growth potential of business-event tourism in the Philippines is enormous. What is needed now is for all tourism stakeholders (the government, the business sector and associations) to join hands to pursue this opportunity as the Malaysian case study above has presented.

Learning from associations in China

I was in Beijing as a panelist in the first China Congress for Associations and Chambers of Commerce. This was upon the invitation of the China Council for the Promotion of International Trade Commercial Sub-Council, also known as the CCOIC Commercial Chamber of Commerce, and in collaboration with the China Economic Information Service of Xinhua News Agency, the China Social Organization magazine, the China Business Event Federation and the IME Consulting Co. Ltd. About 250 delegates, mostly from China, and around 15 guests from overseas who served as speakers and resource persons, including myself, attended the one-day gathering. As CEO and founder of PCAAE, I was invited to share my experience of setting up a platform for associations and other membership organizations here.

The conference, themed "Globalization, Cooperation and Mutual Benefit," put together in one forum the associations and chambers of commerce to exchange ideas, strategies, and initiatives in line with the new thrust of the Chinese government to open and transform the so-called social organizations in the country. I have learned that associations in China are categorized as "social organizations," which also includes chambers of commerce, foundations and nongovernment organizations. There are over 800,000 such organizations under the Ministry of Civil Affairs of China.

According to the China Development Brief, the General Offices of the Communist Party of China Central Committee and that of the State Council published a "General Plan to Decouple Industry Association, Chamber of Commerce and the Executive Authorities." As such, industry associations and chambers of commerce would be separated from the executive authorities or their professional supervisory units in five different aspects: mechanism, functions, financial assets, management and "Party building." The hope was that the success of such transformation will lead to national economic development, as well. This development in China provides opportunities for associations and chambers of commerce in Asia and the Pacific to learn from each other, collaborate and undertake programs and activities of mutual benefit.

During the panel discussion in the event, entitled “Cross-Boundary Cooperation among Associations and Chambers of Commerce,” I shared with six other panelists from different countries the following ideas for associations and chambers of commerce to undertake:

- Knowledge Hub: Collaborate in one common platform to contribute to human talent development through joint research and educational programs—The so-called soft infrastructure—under the “Belt and Road” initiative, which focuses on “hard infrastructure.”
- Policy Advocates: Prepare position papers and policy recommendations toward the betterment of cross-border trade of goods and services, specifically on areas such as industry standards and ease of doing business.
- Facilitators: Organize dialogues and forums to optimize association governance and management practices, codes of conduct and ethical behavior to be universally applicable.
- Incubators: Develop markets for products and services that can be traded across borders

Redefining business events—the Thai way

I recently participated in the 26th Incentive Travel & Conventions, Meetings Asia (IT&CMA) organized by the Singapore-based TTG Asia Media Events, it was held at the Bangkok Convention Centre at Central World. IT&CMA is one of the largest events dedicated to the Meetings, Incentives, Conventions and Exhibitions (MICE) industry in the Asia-Pacific region. The event gathered more than 800 exhibitors, representing about 300 companies and organizations, plus 440 hosted buyers, including associations. The organizers also had a curated program attended by association influencers and decision-makers who shared their expertise in tailored learning forums, scheduled business appointments, updates from destinations and networking sessions.

One destination update I attended featured the new branding campaign of the Thailand Convention & Exhibition Bureau (TCEB), themed “Redefine Your Business Events.” This aims to meet the shifting demands of business travelers with a fresh perspective on corporate and association events. The campaign is driven by the Thai government’s “Thailand 4.0 Policy” to challenge the competition in today’s fast-paced business landscape. Thailand 4.0 is an economic model that aims to unlock the country’s potential from several economic challenges resulting from past economic development models. The new model places emphasis on agriculture (Thailand 1.0), light industries (Thailand 2.0) and advanced industries (Thailand 3.0).

TCEB Senior Vice President Nichapa Yoswee said: “TCEB’s new branding strategy is set to match the expanded demands of business travelers looking for more experimental, unique, and new experiences, and searching for more returns—from return on investment to return on objective and return on happiness. TCEB is moving forward with an important mission to promote the business events industry as Thailand’s key economic contributor.”

To elevate the Meeting & Incentives sector, TCEB will be implementing strategic plans that will focus on building a MICE ecosystem to encourage target groups and integrate programs in three directions. First is to enhance MI activities in targeted industries under the Thailand 4.0 Policy by promoting the country's key industrial sectors through meeting activities. Second is to increase meeting activities in MICE cities and second-tier MICE destinations such as the Hua Hin, Chiang Rai, and Koh Samui in Surat Thani. and the development of MICE resources will help create jobs and raise revenue. Third is to strengthen abilities of local MICE operators in the area of product and service development, and marketing and sales capabilities.

The bureau estimates that Thailand will welcome 1.3 million overseas business travelers at the end of the fiscal year 2018—a number that is 3.96 percent higher than in 2017—and generating 124,000 million baht in revenues to the country, or a growth of 15.98 percent.

By sharing this story, I hope policy-makers here start to really appreciate the importance and contribution of the MICE industry to the economy. Learning from this Thai experience means for us to develop a more coherent and coordinated approach and to expand the MICE ecosystem and tie this up with the economic development plans of the nation.

Chapter 3: Being the Best We Can Be

Provide a 'SPARK' in your association's strategic plan

In ["Business Associations for the 21st Century"](#), the Washington, D.C.-based Center for International Private Enterprise (CIPE) describes associations as voluntary business-, professional-and community-improvement groups that combine their synergistic power by working together to solve mutual problems. Often partnering with government, associations have developed programs and encouraged public policies that help expand economic bases. "Were it not for business and professional organizations, other societal institutions would face added burdens in such areas as economic development, product performance and safety standards, continuing education, public information, professional ethics, geo-economic research, industry statistics, community service and consumer information," the publication noted.

Associations, therefore, are communities of like-minded institutions or individuals that bind themselves together to share a common purpose and vision. As structured organizations themselves, associations too, like their corporate counterparts, need to be strategic and sustainable. Here is the "SPARK" framework and rationale that my organization, the Association of Development Financing Institutions in Asia and the Pacific (ADFIAP) has used to spell out its direction and efforts for its new five-year strategic plan:

- **Sustaining membership** – A large, progressive and active membership, as well as the positive experiences of the members through the association's meaningful program and activity offerings, are essential to its success and sustainability. As such, having a robust membership with relevant member services should be the main objective

of the association. Simply put, if there are no services, there are no members and, if there are no members, there is no association to speak of.

- **Promoting advocacy** – A focused and credible commitment to a specific advocacy, as well as the association’s active engagement with same-purposed and respected institutions in this avowed advocacy, are crucial elements in taking the association to a leadership role. The association thus has to engage, shape and advance policy and advocacy positions that impact its industry or profession and, at the same time, improve the membership’s capacity to do the same.
- **Advancing human-resource development** – Professional, skilled and multi-disciplinary human resources efforts brought about by the continuous educational and certification programs offered by the association are a vital component of its members’ organizational efficiency and long-term growth. An association must therefore advance the development of its members by establishing standards, credentials and core competencies; improving their skills and prominence; and guiding them into recruiting and retaining talented and committed individuals in the profession.
- **Revving up resources** – A financially healthy and partnership-friendly association will be able to muster the value and strength of these resources toward the benefit of its members, as well as contribute to the public good. A key effort of an association is to innovate on and expand its available pool of human, financial and relationship resources to support the operational needs of the association and its members to undertake their mandated mission.
- **Keeping alliances** – The bond among members, affiliates and partners in the same community committed to a common cause and vision is the currency of an association. Maintaining and invigorating these relationships will make the association even better and stronger in the long run.

Member-relations ambassador, anyone?

Serving and engaging with members is a natural role for associations. However, I have yet to encounter the job title “member relations ambassador” that exists in the association community here or abroad. That was, at least, until I went to Kuala Lumpur as part of the organizing team for our association’s annual CEO Forum held in the Malaysian capital.

The event gathered 250 delegates from 23 countries at the Intercontinental KL Hotel. The moment our team of three checked into the hotel, there was already this homey welcoming feeling as the doorman, the bell captain and the receptionist were all smiles and very helpful. It was quite eerie, too, though in a positive sense, when we had our late lunch at the hotel’s dining outlet, Serena. A “roving conversationalist” (as I referred to him since he was going around and chatting with other diners) approached our table and greeted me with my first name. He presented himself as simply Jason, who, with his amiable personality, told us that he’s the “man to call” if we needed something.

Dinner time came and we opted to eat at the same dining area - and as soon as we settled down, there was Jason, greeting us again.

The next morning at breakfast, I had a longer chat with Jason as I was curious about his job. He sat across my table and I saw the opportunity to interview him. He gave me his business card and I noticed his job title, “guest relations ambassador.” I probed more and found out that he’s 64 years old, no college degree, diabetic and with a high blood-pressure condition. And yet, he said, he sleeps only about four to five hours a day, has never been late at work, and does his “routine” day in, day out. I was truly impressed!

I told him I was an association executive, and that associations could surely learn from his experience. So I asked him what he could share with associations based on his work. He mentioned three things that are important in his job: passion, positive attitude and punctuality. Here’s how I thought the three attributes he told me relate to an association executive’s work:

- **Passion** – putting more energy into something than is required. Passion is about fulfilling a mission with a whole heart, mind and soul. This is what keeps an association executive awake at night, thinking of what more can be done for the association and its members.
- **Positive attitude** – I equate this to humaneness, characterized by tenderness, compassion, sympathy and respect for people. Associations are communities of people and, as such, require the association executive to give due consideration to the needs and aspirations of its members.
- **Punctuality** – being able to complete a required task before or at a previously designated time. I would also relate punctuality to dedication—the quality of being committed to a task or purpose. Associations thrive and sustain themselves because of their purpose, i.e., advancing a cause or advocacy. Because of the nature of their job, association executives need to focus on mission-critical and timely services to members.

As member-serving organizations, associations can certainly learn from Jason’s worthy 3P’s and can emulate these traits in relating to their members. Considering a job title for your association? How about a member-relations ambassador?

The Legacy of Associations

Nowadays in the association world, I hear a lot about building a “legacy,” especially in the context of what associations “leave behind” after organizing events in a venue destination.

In his article in *Legatus* magazine, Paul J. Voss writes that the word legacy has been used exclusively as a noun for nearly 500 years but has expanded its original meaning and now signifies a “gift” or “bequest” transmitted from one person (or one generation) to another. He adds, “used as a noun in this fashion, legacy carries a wholly positive meaning and represents an act of love, charity and care.”

In “Three Legacy Opportunities for Associations,” an article in the April 2017 issue of *Boardroom* magazine, Keith Burton and Kristen Tremeer wrote: “International professional

associations that convene congresses in destinations around the world mustn't miss out on the opportunity to leave a legacy that reflects the values of the association, whether tangible or intangible, social, or economic or environmental." It then offers three legacy opportunities for associations:

- **Community engagement:** Examples are planting a vegetable garden for a seniors' center, building a playground for a preschool or constructing a library at a community center. It's a "volun-tourism" approach that gives visitors to a destination a chance to interact with local residents they might not have otherwise been able to meet.
- **Content-driven:** Examples range from the establishment of an endowment in a relevant university department to a scholarship for participants from developing economies to attend future congresses, or using the host association's members as congress volunteers.
- **Skills transfer:** An example is a mobile clinic in an underdeveloped facility staffed by leading physicians, who treat and train their local counterparts or special training sessions for students in a particular field.

But how about legacy "beyond events?" What legacy do associations give to society? Below are some examples of what Philippine associations and other member-serving organizations have done and are still doing. These outstanding legacy projects have been recognized by the Philippine Council of Associations and Association Executives (PCAAE) through its annual "Ang Susi" Awards:

The Cement Manufacturers' Association of the Philippines's "Road Safety Program" aims to standardize road-safety guidelines among all its member-companies' trucking contractors.

The National Confederation of Cooperatives' "Aflatoun Social and Financial Education Program" allows children from diverse socioeconomic backgrounds to manage their own savings accounts and learn about savings, spending and budgeting, among others.

The Philippine Franchise Association's "Certified Franchise Executive (CFE) Program" offers franchise professionals the opportunity to learn, grow professionally and reach a recognized standard of excellence in the franchise community.

Alalay sa Kaunlaran Foundation's "Agriculture Value Chain for Onion Farmers in San Jose City: Onion and Vegetable Producers Cooperative" helps onion farmers to have a sustainable agricultural livelihood and uplift their socioeconomic condition by adding value to their produce with stable pricing and market availability.

These legacy projects demonstrate that associations not only provide services to members but also benefit a wider community and, in effect, have the potential to contribute to the socioeconomic development of the country.

About the Author



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