

A QUANTITATIVE ANALYSIS OF MOTIVATIONS OF ASSOCIATION  
EXECUTIVES  
TO EARN THE CERTIFIED ASSOCIATION EXECUTIVE CREDENTIAL

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A Dissertation  
presented to  
the Faculty of the Graduate School  
at the University of Missouri-Columbia

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In Partial Fulfillment  
of the Requirements of the Degree  
Doctor of Education

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by  
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MAY 2022

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The undersigned, appointed by the dean of the Graduate School, have examined the

dissertation entitled

A QUANTITATIVE ANALYSIS OF MOTIVATIONS OF ASSOCIATION  
EXECUTIVES

TO EARN THE CERTIFIED ASSOCIATION EXECUTIVE CREDENTIAL

Presented by Amy J. Farmer, a candidate for the degree of doctor of education moreover,

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## Acknowledgements

First, and foremost, I thank my husband Kyle. Your belief in me has been stronger than my belief in myself. You have sacrificed immensely and made this journey ours. I would not have completed this journey without your love and support. Thank you for sharing your mad editing skills; they are an incredible gift.

To Cade and Marc, your constant encouragement and unending belief kept me pushing forward. Disappointing you was not an option. I hope you know am I your biggest cheerleader as you both have been for me. Moe, Franki, and Henry, thank you for your patience throughout this process. It has been a long one, and we all deserve a vacation. Also, to Connie, I would be remiss if I did not adequately thank you. Your direction and support were invaluable, and I am forever indebted to you. Jim and Louise, I hope I have made you proud.

I must thank the study participants whose responses made this research possible. I sincerely appreciate the colleagues, friends, and members of my professional network who helped to distribute the study and encourage completion. The number of responses exceeded expectations and would not have been possible without your help. I owe much gratitude to the leaders of the association world who have taken an interest in this research, reassuring me this is important work and an essential contribution to the association profession.

Finally, my greatest thanks to Dr. Barbara Martin for your unwavering belief in high standards, refusal to lower your expectations, and push to hold me accountable for my best work. I took us out of our comfort zone with this research, and you supported me through the entire journey. Thank you for believing in me and this research. Lastly, thank you to my dissertation committee: Dr. Carolyn P. McKnight, Dr. Hayet Woods, and Dr. Sandy Hutchinson. Your time and effort provided much-needed support and assistance.

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## Abstract

The Certified Association Executive credential is a professional certification designed to identify association management professionals committed to a wide range of knowledge essential to the management of an association. Though the CAE has existed since 1960, no research exists related to the motivations of those individuals that chose to pursue the certification. The purpose of this study was to identify the most significant motivations that lead association professionals to sit for the Certified Association Executive certification and the relationship of those motivations to certain demographic variables.

The researcher used the *Educational Participation Scale A-Form* to ascertain the motivational factors most relevant to association management professionals that choose to sit for the CAE. The researcher's survey included three demographic questions that asked participants to self-identify their gender, race, and career stage at the time they sat for the CAE.

The results of this study were organized to answer four research questions that examined these motivations overall and how they related to the demographic data. The study concluded there were not significant differences in motivations amongst the demographics identified by the researcher, but the data did ascertain that the motivational factors of professional advancement and cognitive interest were the prevailing motivators across all demographics.

**SECTION ONE**  
**INTRODUCTION TO DISSERTATION**

## Background of the Study

American historian Arthur Schlesinger (1944) liked to refer to the United States as “a nation of joiners” (p. 2). Since the mid-19th Century, this sense of joining has regularly revolved around the concept of the voluntary association (Gamm & Putnam, 1999). The notion of voluntary associations, however, dates back to the merchant communities of the preindustrial states (Anderson, 1971; Sjoberg, 1960). As industrialization spread throughout the West, voluntary associations began to expand to all levels of society (Anderson, 1971; Rose, 1958).

The earliest American settlers created guilds in the New World based on the trade groups of their native England (American Society of Association Executives, 2015). Religion and politics drove most organizing in the late nineteenth and early twentieth centuries in the United States (Gamm & Putnam, 1999). Voluntary associations in the United States have evolved since the mid-twentieth century, but the central theme of working together toward a common goal persists (American Society of Association Executives, 2015).

In the modern United States, the task of oversight and enforcement of the tax code that regulates voluntary associations falls to the Internal Revenue Service (IRS) (American Society of Association Executives, 2015). The IRS defined an association as “a group of persons banded together for a specific purpose” (American Society of Association Executives, 2015; Internal Revenue Service, n.d., Definition of an association, para. 1). To qualify under the internal revenue code as an association, the group must have a written document showing its creation (Internal Revenue Service, n.d., Definition of an association). As of 2016, the IRS recognized over 63,000 trade and

professional associations and more than 1.2 million charitable and philanthropic organizations (American Society of Association Executives, 2015). Membership organizations employ over 1.3 million people in the United States and generate \$116 billion in revenue annually (American Society of Association Executives, 2015).

Founded in 1920 to help associations “transform society through the power of collaboration” was the American Society of Association Executives (ASAE) (American Society of Association Executives, 2021, About ASAE, para. 1). Now boasting more than 48,000 members representing 7,400 organizations worldwide, the ASAE is one of the preeminent organizations supporting and promoting the role of associations across the globe (American Society of Association Executives, 2021, About ASAE). One of the ways the ASAE promotes the role of associations is through their Certified Association Executive (CAE) certification program.

First introduced in 1960, the CAE certification is the marker of a committed association professional who has demonstrated the wide range of knowledge essential to manage an association in a challenging environment (Edwards, 2020). To earn the CAE credential, an individual must pass a 200-question timed exam covering the following eight domains of knowledge: (a) governance, (b) executive leadership, (c) organizational strategy, (d) operations, (e) business development, (f) member and stakeholder engagement and management, (g) advocacy, and (h) marketing and communications (Edwards, 2020). To sit for the CAE, applicants must meet a set of basic qualifications:

- be employed, currently or within the preceding five years, in a qualifying nonprofit organization or association management company;
- have sufficient qualifying association management work experience;

- have a bachelor's degree or higher, or meet professional equivalency requirements;
- have completed a minimum of 100 hours of qualifying professional development;
- sign an attestation to uphold ASAE's standard of conduct; and
- disclose any felony convictions. (Edwards, 2020, pp. 15-16)

Triennial renewal of the certification requires completion of a minimum of 40 hours of qualifying professional development (Edwards, 2020).

The researcher contended that to understand the role of the CAE certification currently, it was imperative to understand the motivations that drive association professionals to sit for the exam. There is significant research on the benefits of earning a professional certification, both for the earner and for the certifying organization (Adams et al., 2004; Delacruz, 2014; Gleghorn & Gordon, 2012; Hale, 2011; Lester et al., 2011; Stinnett, 2017). In addition, there is also an amount of research regarding the motivations of professional certification earners in general (Abraham & Boetticher, 2006; Albert & Dingham, 2010; Cheng et al., 2011; Fertig, 2011; Jensen, 2007; Lester & Dwyer, 2012). Specifically, the focus of this research was to examine the motivations of association management professionals that choose to sit for the Certified Association Executive certification.

### **Statement of the Problem**

Association management professionals have a wide variety of professional learning options available to them (Lester & Dwyer, 2012). Despite an ever-expanding catalog of opportunities, 400-500 association professionals choose to take the CAE exam

every year (American Society of Association Executives, 2021, CAE annual report stats). While the raw data regarding the number of individuals that pursue the certification is illustrative of its significance in the association management world, this data alone did not provide a complete picture of exam takers and their motivations since little is known regarding the reasons association professionals choose to sit for the CAE exam.

Previous research established that many professionals pursue certifications as a means of increasing their earning potential or job status (Albert & Dignam, 2010; Stein & Wanstreet, 2006), but this research was not specific to the association management profession in general nor the CAE certification specifically. Analyzing the motivations of CAE certification candidates provided new and important knowledge for both the certifying organization, the American Society of Association Executives, and organizations that provide assistance and resources to CAE certification candidates.

Birren and Woodruff (1973) and Morstain and Smart (1974) discussed the need to periodically study and monitor cohort groups to reevaluate programs to meet the needs of succeeding cohorts. As the CAE certification continues to evolve, it is important for the ASAE to maintain its connection with those working in the association management community and those professionals' motivations for pursuing certification. The researcher designed the study to identify and classify those motivations using Houle's (1961) typology of adult. Houle's (1961) research determined the motivations of adult learners fell into three distinct categories: goal-oriented learners, activity-oriented learners, and learning-oriented learners. Each category made learning choices based on a different emphasis.

Goal-oriented learners participate in continuing education programs as a means of accomplishing clear objectives (Boshier & Collins, 1985; Bulluck, 2017; Gordon, 1993; Houle, 1961). The education of goal-oriented learners is generally episodic and begins with a realization of a need or the identification of an interest (Boshier, 1971; Gordon, 1993; Houle, 1961). The amount and kind of human relationship is the driving force behind the choice of continuing education for activity-oriented learners (Boshier, 1971; Gordon, 1993). The social opportunities in the educational setting provide opportunities to interact with others (Bulluck, 2017). Houle (1961) offered a non-exhaustive list of factors that lead activity-oriented learners to educational opportunities including companionship, escapism, prestige, and tradition. The learning-oriented group has a genuine love for learning and view it as a habitual activity (Bullock, 2017). Regardless of the learning activity or the learner's reason for engaging in the specific activity, the fundamental purpose is always the desire to know (Houle, 1961). The learning-oriented seem to engage in continuing education simply for learning itself (Houle, 1961).

While the significance of the CAE certification is apparent from the number of certifications conferred yearly, there is still a significant population of association professionals that choose not to pursue the certification. The ASAE (2015) estimated there are more than 1.3 million people employed by membership organizations in the United States, yet there are currently only 4,500 active CAEs (American Society of Association Executives, 2021, CAE annual report stats). Professional certification holders are typically viewed more positively than their non-certification holding peers (Lester et al., 2011), so why are so few association professionals pursuing the most significant certification in their profession? There was no significant research related directly to the

CAE that helps analyze the gap in the number of association professionals versus the number of association professionals that earn the certification. Studying the motivations of those that do choose to sit for the CAE helps the association management community convince more professionals to earn the highly regarded certification.

### **Purpose of the Study**

The purpose of this study was to identify the most significant motivations that lead association professionals to sit for the Certified Association Executive certification and the relationship of those motivations to certain demographic variables. The researcher believed the most appropriate means of exploring this question was to classify certification participants using Houle's (1961) typology of adult learners. Using Houle's typology and categorizing participants based on the three learner types (goal-oriented learners, activity-oriented learners, and learning-oriented learners) allowed the researcher to develop a better understanding of CAE candidates and the requisite modernization of the certification as well as the potential marketing strategies that will best reach today's association management professional.

This study provides great insight into the mindset of association management professionals interested in professional certification. This insight is of most interest to the ASAE as the certifying body behind the CAE certification, but it also provides direction for other organizations in the association management space. Whether an organization provides their own certification, offers companion educational services related to the CAE, or convinces their employees to pursue the CAE, knowledge of the significant motivational forces behind the decisions of association professionals provides important

direction. Therefore, the researcher proposed the following four research questions that guide this study:

1. Is there a significant difference between association professionals that choose to sit for the CAE certification for goal-oriented reasons as opposed to learner-oriented reasons or activity-oriented reasons?
2. Is there a significant difference in the motivations of male association professionals that choose to sit for the CAE certification compared to female association professionals that choose to sit for the CAE certification?
3. Is there a significant difference between an association professional's career stage and their motivation for sitting for the CAE certification?
4. Is there a significant difference in the motivations of association professionals that choose to sit for the CAE certification based on their racial demographics?

### **Theoretical Framework**

The theoretical framework for this study was motivation theory. The study of motivation is the study of the various reactions humans have to stimuli, and the why they have those reactions (Beck, 2004; Deci & Ryan, 1985). While the understanding of human motivation has grown more complex over the course of history, there is still much not known (Gollwitzer & Oettingen, 2015; Reeve, 2018). Many researchers of motivation have begun to narrow their focus to study the motivations of specific populations. Houle (1961), for instance, focused his research on motivation of adult learners. Based on his study of 22 individuals actively engaged in adult learning, Houle (1961) developed a tripartite typology of three distinct learner orientations. Goal-oriented, activity-oriented, and learning-oriented learners each have a distinct emphasis behind their motivations to

participate in adult education programming (Houle, 1961). Expanded over the course the following decades, Houle's typology is still a valid framework for analyzing the motivations of adult learners (Boshier, 1971; Bulluck, 2017; Morstain & Smart, 1974).

In addition to his initial work with adult learners in general, Houle (1980) also researched the learning habits of professionals as a group. This extension of his previous work found that professionals studied to pursue theoretical applications of knowledge they could use in their professions, as well as, for personal reasons that aided their problem-solving abilities (Houle, 1980). Houle (1980) also called for continuous modification and updating of continuing professional education programs with four specific goals in mind: maintenance and modernization of practice; preparation for change; induction to new responsibilities; and refresher training. Additionally, Houle (1980) identified a social component amongst members of professional groups. This social interaction, while obviously aligning with the activity-oriented learner motivation, provides a deeper understanding of colleagues and different perspectives of practice for future use (Cervero, 1988; Houle, 1980).

Houle's (1980) subsequent research on those in professional lines of work aligned with the current study. The researcher was able to determine the motivations of association management professionals that choose to sit for the CAE certification within the framework of Houle's (1961) typology of adult learners.

The researcher contemplated and rejected other motivational theories before deciding to apply Houle's (1961) typology to the study. Considered a fundamental theory of motivation but was not appropriate for the current study was Maslow's (1943) hierarchy of needs theory. Specifically, the current research was not concerned with the

search for self-actualization that is the basis of Maslow's work (Beck, 2004; Souders, 2020). Furthermore, the inability of subsequent researchers to replicate Maslow's work (Geller, 1982; Petri & Govern, 2004; Schultz, 1977), as opposed to numerous studies validating and replicating Houle's work (Bulluck, 2017), concerned the researcher and ultimately led to the rejection of Maslow's (1943) theory as a conceptual framework for this study.

Likewise, McClelland's (1961) need for achievement theory was not an appropriate framework for the current study. McClelland's (1961) work argued individuals will only do what they have been rewarded for doing in the past (Beck, 2004; Gibson, 1979; Reeve, 2018). Modern theorists rejected this formal view on motivation theory as too simplistic and failing to recognize the multi-variant factors that motivate individuals. Additionally, McClelland's (1961) work has also faced replication problems (Locke & Latham, 2004), which convinced the researcher to utilize Houle's (1961) typology, rather than McClelland's need for achievement theory for the conceptual framework.

### **Design of the Study**

The researcher framed this inquiry from a postpositivist paradigm because it sought to test theories to understand phenomena encountered in the world (Creswell, 2014). According to Mertens (2010), the postpositive paradigm is the foundation of quantitative research. Postpositivists believe in the importance of objectivity and generalizability but focus their claims to understandings of truth based on probability as opposed to certainty (Mertens, 2010). Consequently, this study utilized a quantitative design.

The data gained from this study came from the *Education Participation Scale*, a 42-question Likert scale electronic survey specifically designed to test Houle's (1961) typology of motivation. A survey of this type correlates with the axiological belief of the postpositivist paradigm by respecting the privacy of the respondent as well as minimizing harm through an informed consent prior to beginning the survey (Mertens, 2010). Because objectivity was important to the postpositivist researcher, the anonymous survey allowed the researcher to observe and manipulate the data in a "dispassionate, objective manner" (Mertens, 2010, p. 11).

Prior to collecting data, the researcher's dissertation committee approved the research process. Once approved by the committee, the researcher submitted the proposal, and it was approved by the University of Missouri – Columbia's Institutional Review Board (IRB) (Appendix A).

All participants completed the *Education Participation Scale* (EPS) (Appendix B) A-Form survey online following a provided link using a personal electronic device or computer (Boshier, 1971). The researcher obtained appropriate permissions from each survey participant (Appendix C). The survey's relevance to the research topic and its established validity and reliability in past studies prompted the use of the survey in this research (Boshier, 1991; Fujita-Starck, 1996).

### **Setting**

The researcher conducted this study throughout the United States. There are approximately 4,500 current, active CAE certifications in the United States. These certification holders are across the country, but there are certain regions that have a larger percentage of association executives than the rest of the country. Washington, DC, due to

the presence of the federal government, has a large concentration of association management professionals with nearly 3,000 associations and 36,000 other nonprofits calling the nation's capital home (American Society of Association Executives, 2015). Beyond Washington, DC, the Chicago and New York City metropolitan areas also have significant congregations of associations and association professionals (American Society of Association Executives, 2015).

The American Society of Association Executives (ASAE), which owns and administers the Certified Association Executive certification program, is the country's largest membership organization boasting more than 48,000 members and representing 7,400 organizations within the association management community (American Society of Association Executives, 2021, About us). The ASAE's membership structure encompasses three distinct membership types: association and association management company professionals, consultants and industry partners, and associations and association management companies (American Society of Association Executives, 2021, Membership). For the purposes of this study, the researcher focused solely on individual members.

There are statewide and regional ASAE affiliates throughout the United States that offer local opportunities for association executives to collaborate and network. While not connected to the ASAE through a formal contractual agreement, these smaller organizations connections are significant and provided the researcher access to a larger network of association professionals.

## **Participants**

The researcher electronically surveyed association professionals who have taken the CAE certification exam regardless of the result of the exam. By crafting the outreach to not only target those that have earned the CAE certification, but also those association professionals that have either taken the exam and failed or have contemplated taking the exam without actually sitting for the exam yet, the researcher expanded the pool of potential respondents and increased the likelihood of receiving substantial responses. This purposive sample provided the most in-depth, valid responses to the survey (Fink, 2009). To determine the motivations of association professionals that choose to sit for the CAE, the researcher directly surveyed those very same association professionals.

Since the researcher did not have access to an exhaustive list of association professionals that have taken the CAE certification exam due to ASAE policy prohibiting the sale or use of that list of participants, the researcher distributed the survey nationwide through a variety of alternative sources. The ASAE supports a robust online community for ASAE members to engage in discussion and collaboration with their peers in the association management profession. This forum allowed the researcher to present the survey to CAEs across the nation. Further, the researcher worked with local and state ASAE affiliates to distribute the survey to their respective memberships. Distributing the survey through these outlets provided the survey with instant credibility and nationwide distribution.

Finally, the researcher collaborated with leaders and influencers within the association management community to distribute the survey to their audiences via social media channels, websites, and distribution lists. Association Brain Food, an email

subscription resource owned and operated by a fellow CAE, reaches over 1,000 association professionals every week. Association professionals and CAEs alike rely upon the Association Brain Food newsletter as a resource for free educational events and association thought leadership. Sidecar, originally founded in 2016 as AssociationSuccess.org, is an innovative website and blog dedicated to creating the professional development tools a leader needs to grow their career and their purpose-driven membership organization. Both Association Brain Food and Sidecar agreed to distribute the researcher's survey. Distributing the survey nationwide through multiple techniques and channels allowed for the most significant reach across the target audience.

The researcher believed the variety of distribution methods guaranteed the greatest geographical reach for the survey and provided the best opportunity to reach the diverse respondents necessary for the research. The use of this varied distribution strategy allowed the researcher to collect 495 responses to the survey and provided a statistically relevant sample size.

### **Data Collection**

The researcher conducted a self-administered survey of participants (Fink, 2009; Gay & Airasian, 2003; Sapsford, 1999). A survey was the appropriate method of data collection for this research because it allowed for the accumulation of data from a larger number of people than a quasi-experimental or experimental design (Fink, 2009; Mertens, 2010). In addition, the survey was a cost-effective method of collecting data from a significant number of participants (Fink, 2009). Using a survey allowed the researcher to collect data from association professionals across the United States and expanded the scope of this research.

Specifically, the researcher utilized the *Education Participation Scale (EPS) A-Form* created by Boshier (1971) (Appendix B). Boshier (1971) created his quantitative instrument to test Houle's typology of motivational orientation (Boshier, 1971; Boshier & Collins, 1985). The original *Education Participation Scale (EPS)* consisted of 48 reasons for participation in adult continuing education activities and asked participants to rate the importance of each factor on a nine-point scale (Boshier, 1971; Bulluck, 2017; Morstain & Smart, 1974). Boshier (1971) created the EPS due to the unreliability of written statements regarding reasons for involvement in a complex activity like adult education and the difficulty creating a replicable and viable format for coding open-ended responses without researcher bias skewing the results (Boshier, 1971).

The EPS A-Form, created by Boshier in 1991, consists of a list of 42 items that asks the participant to determine the extent to which each listed reason influenced their decision to participate in the education course or program. Each item includes four possible answers using a Likert scale of responses: 1) No influence, 2) Little influence, 3) Moderate influence or 4) Much influence. Participants are to select one answer for each reason. In addition to the 42-item survey, participants answered three demographic questions at the beginning of the survey. The three demographic questions asked the participant to select the gender, race, and career stage with which they identify. Timeline for survey administration was winter 2021-2022.

This study employed the use of an existing instrument with established validity and reliability from past studies (Boshier, 1991; Fujita-Starck, 1996). Used to assess the motivations for earning the CAE certification was *The Education Participation Scale (EPS) A-Form* (Boshier, 1991). Developed by Boshier (1971) in the 1960s and based on

Houle's (1961) three learning orientations was the EPS-F (first) form. The development of the A-form progressed in five phases. Phase 5 consisted of gathering validity data (Boshier, 1991). Construct validity was found due to repeated high loadings of the factors in the 42-item EPS, and each factor had the same number of items loaded. Discriminant analysis of 845 subjects revealed 321 men and 523 women, 844 of whom reported ethnic origin as 46.4% North Americans, 36.7% Asians, and 16.9% European (Boshier, 1991). The A-Form predicted gender and ethnicity with a 60% accuracy rate. The seven factor loadings were in the following categories: communication improvement – enrolled to improve verbal and written communication skills loaded with a factor score on six items with a Cronbach alpha of .89 and a test/retest reliability of .56; social contact – enrolled to meet people and make friends loaded six items with an alpha of .95 and test/retest reliability of .75; educational preparation – motivated to overcome educational deficiencies and prepare for future education loaded six items with an alpha of .80 and a test/retest reliability of .61; professional advancement – concerned with job growth in an existing or future job position loaded six items with a reliability alpha of .80 with test/retest reliability of .70; family togetherness – concerned with improving familial relationships loaded with six factors with Cronbach alpha of .82 and test/retest reliability of .74; social stimulation – moved to escape isolation, boredom, or unhappiness loaded six items with alpha reliability of .80 and test/retest reliability of .58; cognitive interest – desiring knowledge for its 'own sake' loaded six items with an alpha of .76 and test/retest reliability of .60 (Boshier, 1991, p. 157).

Similarly, Fujita-Starck (1996) replicated Boshier's (1991) study using 1,142 students enrolled in noncredit continuing education courses at the University of Hawaii.

Fujita-Stark's (1996) study validated Boshier's (1991) A-form with an overall alpha of .92.

### **Data Analysis**

The researcher analyzed the data using a multivariate analysis of variance (MANOVA) method to investigate dominant motivations of CAE earners and the relationship between motivations of earners and certain demographic variables. Significant was determined at .05 level.

Explicitly, the independent variables analyzed in the research were gender, race, and career stage. Career stage was defined as new professional (0-5 years in the association management profession), mid-career professional (6-15 years in the association management profession), and veteran professional (16 or more years in the association management profession). The participant's career stage was determined based on their years of service at the time they sat for the CAE exam. Defined, following the parameters of the United States Census Bureau, as Black or African American, White or Caucasian, Hispanic or Latino, Asian or Other Pacific Islander, and Other was Race. The dependent variables in the study were the motivational orientations defined within Boshier's (1971) *Education Participation Scale* by the following seven factors: Communication Improvement – expansion of verbal or written language skills; Social Contact – motivated to learn with others; Educational Preparation – motivated to overcome educational deficiencies and prepare for future learning; Professional Advancement – motivated to enhance current or future job skills; Family Togetherness – concerned with improving familial relationships; Social Stimulation – motivated to

escape loneliness and boredom; and Cognitive Interest – motivated to learn for learning's own sake.

The researcher used the motivational orientations prescribed by Boshier's (1971, 1991) EPS A-Form questionnaire to determine if there was a significant difference between association professionals that choose to sit for the CAE certification for goal-oriented reasons as opposed to learner-oriented reasons or activity-oriented reasons. The seven factors included in the EPS A-Form served as the basis for identifying respondents in accordance with Houle's (1961) typology. EPS factors Professional Advancement and Communication Improvement were assigned to Houle's (1961) goal-oriented learner orientation. The Cognitive Interest and Educational Preparation factors were assigned to the learner-oriented orientation. Finally, the Social Contact, Family Togetherness, and Social Stimulation factors were applied to Houle's (1961) activity-oriented orientation. The researcher used a MANOVA test to analyze the data. Significant was determined at .05 level.

Demographic questions located at the end of the survey allowed the researcher to answer the study's remaining research questions. Self-reported gender information served as the basis for determining if there was a significant difference in the motivations of male association professionals compared to female association professionals that choose to sit for the CAE certification. The researcher used a MANOVA test to analyze the data. Significant was determined at .05 level.

Likewise, self-reported information regarding the respondent's career stage, as defined above, allowed the researcher to conclude if there was a correlation between association professionals' career stage and their motivation for sitting for the CAE

certification. The researcher used a MANOVA test to analyze the data. Significant was determined at .05 level.

Finally, self-reported racial demographic data allowed the researcher to establish if there was a significant difference in the motivations of association professionals based on their racial demographics. Based on the constraints utilized by the United States Census Bureau was the racial demographic questions. The researcher used a MANOVA test to analyze the data. Significant was determined at .05 level.

### **Definition of Key Terms**

Defined for the study are several key terms that will help in understanding this investigation.

**Activity-Oriented Learner:** An activity-oriented learner is a learner whose learning decisions connect directly to the amount and kind of human relationship the learning opportunity offers (Houle, 1961).

**Association Management Company:** Association management companies are for-profit organizations that provide management services for associations ranging from full-service management to specific services such as strategic planning, human resources, membership, and event planning (AMC Institute, n.d.).

**Association Professional:** In this study, an association professional was someone employed at an association or association management company.

**Career Stages:** For this study, career stages were separated into three distinct classifications: new professional (0-5 years in the association management profession), mid-career professional (6-15 years in the association management profession), and veteran professional (16 or more years in the association management profession).

**Certification:** A certification is a voluntary process by which individuals demonstrate the possession of knowledge, usually through some form of assessment, of a particular skill (Edwards, 2020).

**Gender:** For this study, the researcher offered the following gender options to respondents: “identifies as males,” “identifies as female,” and “identifies as other than male or female.”

**Goal-Oriented Learner:** A goal-oriented learner is a learner that participates in learning opportunities as a means of accomplishing clear-cut objectives (Houle, 1961).

**Learning-Oriented Learning:** A learning-oriented learner who views learning as a life-long pursuit and approaches learning opportunities based on the desire to learn new things (Houle, 1961).

**Race:** For this study, race was defined using the U.S. Census Bureau’s standards on race and ethnicity and will include: white, black or African American, American Indian or Alaska native, Asian, Native Hawaiian or other Pacific islander (United States Census Bureau, 2021, FAQ).

### **Limitations and Quality Control**

As with any research, there were multiple limitations within the study. The use of a self-administered survey did present some limitations to the research. Self-administered surveys depend on participants responding to the questions on their own, so the validity of the research depended on both the participants’ clear understanding of the questions and responses and their honesty (Creswell, 2014; Fink, 2009; Mertens, 2010). The researcher’s use of Boshier’s (1991) thoroughly researched and well-established EPS A-Form survey alleviated some concerns regarding the participants’ understanding

of the survey items. The EPS A-Form validation and results replication occurred in subsequent studies (Farmer, 2008; Fujita-Starck, 1996). The researcher was confident in the validity and reliability of the chosen research format and specific research tool.

The issue of broad-based appeal for participants raised concerns related to participants' trust when completing a survey received via email or found online due to the lack of researcher-participant relationship (Field, 2009; Fink, 2009). The researcher attempted to resolve this concern by partnering with groups and individuals that have strong relationships with the proposed participants. The large number of responses received indicated the researcher was able to avoid this concern for almost 500 association management professionals.

The electronic collection of data created concerns regarding the ability to strictly control access to the survey (Fink, 2009). Even using screening questions in the consent process did not guarantee that all participants were members of the target audience. These potential coverage errors were recognized limitations of the study (Mertens, 2010). The researcher chose to preserve the anonymity of respondents at the risk of these potential sampling errors and the resulting concerns about response integrity.

The prevalence of surveys, both formal and informal, presented a potential limitation based on a lack of responses. Survey response fatigue occurs when individuals are overwhelmed by the growing request for feedback and simply choose not to complete or even begin a survey (Stiles, 2016). Further, even if a potential respondent were to open the survey, a 42-item multiple-choice questionnaire may seem time-consuming and could deter completion (Fink, 2009; Stiles, 2016). The researcher believed the use of trusted sources to disseminate the survey will alleviate these concerns

for many potential respondents. In addition, Boshier's (1991) successful use of the EPS A-Form and Fujtia-Starck's (1996) validation of that work indicated the EPS A-Form questionnaire is not overwhelming for respondents. The collection of 495 completed surveys indicated a significant number of participants were willing to complete the survey and survey response fatigue was not an issue in the study.

### **Significance of the Study**

It is important for individuals at all levels of the adult education and professional certification spectrum to find ways to increase participation, make learning experiences more relevant, and create segmented marketing strategies to reach potential participants (Douglass, 1970; Farmer, 2008; Sprouse, 1981). The researcher designed this investigation to provide insight for those developing the CAE exam and corresponding marketing materials as well as organizations that create and promote educational programs and study materials related to the certification. The analysis provided in this study allowed for more targeted and well-crafted marketing materials and educational programs by identifying the motivations of the association professionals targeted by the materials and programs.

Understanding the motivations of association professionals that choose to pursue the CAE certification allowed the ASAE to increase its share of the professional certification market. As competition grows in the professional certification world (Credential Engine, 2019), the ASAE must work harder to reach association professionals and convince them the CAE certification is the correct choice for them. The ASAE charges exam takers \$500 if they are a member of the ASAE or \$750 if they are not (American Society of Association Executives, 2021, CAE certification FAQs).

Renewing the certification every three years costs ASAE members \$350 and non-members \$500 (American Society of Association Executives, 2021, CAE certification FAQs). As a significant source of revenue for the association, increasing the reach of the CAE certification and securing more applicants could generate significant income for the ASAE.

This study was also designed to benefit association professionals contemplating pursuing the CAE certification. Understanding why this credential is important to others can help current non-CAE holders recognize the benefits of earning the certification. Earning the CAE is a significant time and monetary commitment, so providing additional guidance for potential candidates will assist in their decision-making process.

Most research related to professional certification focuses on the benefits of certification programs to the earner (Adams et al., 2004; Delacruz, 2014; Gleghorn & Gordon, 2012; Keniry, 2020; Lester et al., 2011; Phillips, 2004) and to the certifying organization (Gleghorn & Gordon, 2012; Hale, 2011; Stinnett, 2017). While there is some literature on the motivations of professional certification earners, none of that literature focuses on those working in the association industry generally nor on the Certified Association Executive exam specifically. Current literature, instead, focuses on the motivations of professional certification holders in general (Albert & Dingham, 2010; Cheng et al., 2011; Fertig, 2011) or on specific careers outside of association management such as (a) project managers, (b) nurses, (c) accountants, (d) teachers, (e) computer engineers, and (f) human resources professionals (Abraham & Boetticher, 2006; Jensen, 2007; Lester & Dwyer, 2012). Further, none of the current literature uses

Houle's (1961) typology of adult learners to analyze the motivational orientations of professional certification seekers.

This research provides additional data to the general conversation on motivations of professional certification holders. In addition, this research provides new and unique data on association management professionals and the CAE certification specifically. Further, Houle's (1961) typology selection as a theoretical framework provided a new method of analyzing certification seekers that does not currently exist in the literature.

### **Summary**

Throughout the 60-year history of the Certified Association Executive certification program, there has been no research into the motivations of the professionals pursuing the credential. With CAEs scattered across the United States, conducting such research is an arduous undertaking. However, the significance of understanding these motivations makes the process worthwhile from the perspective of the organization responsible for certification, organizations and entities that create products and programming related to the certification, and to potential certification earners themselves.

Educational programs, including professional certification programs, must continue to evolve and grow or risk becoming inconsequential. Regardless of its current place in the hierarchy of association management professional certifications, the CAE must face the reality that the motivations of their earners and potential candidates is imperative information as the program enters its seventh decade in existence.

**SECTION TWO**

**PRACTITIONER SETTING FOR THE STUDY**

## **Introduction**

Outlined within this section are the American Society of Association Executives' (ASAE) history, organizational framework, and leadership dynamics. This section related research implications arising from the analysis of the organization.

## **History of the Organization**

The American Society of Association Executives (ASAE) founded in 1920 to help associations transform society through the power of collaboration (American Society of Association Executives, 2021, About ASAE). Now boasting more than 48,000 members representing 7,400 organizations worldwide, the ASAE is one of the preeminent organizations supporting and promoting the role of associations across the globe (American Society of Association Executives, 2021, About ASAE). The ASAE's membership structure encompasses three distinct membership types: association and association management company professionals, consultants and industry partners, and associations and association management companies (American Society of Association Executives, 2021, Membership). Individual memberships, like those for individuals working for associations, association management companies, or industry partners, provide services that help members do their jobs better and expand their network of peers and/or customers (American Society of Association Executives, 2021, Membership). Association-wide memberships, on the other hand, provide services and support to the entirety of associations and association management companies staffs (American Society of Association Executives, 2021, Membership).

Membership in the ASAE offers a wide array of benefits. The ASAE website offers a wide range of resources to members on topics such as business operations,

diversity, equity and inclusion, leadership, and many other subjects important to associations and association professionals (American Society of Association Executives, 2021, Resources). The ASAE also provides a plethora of events, both live and in-person, designed to provide professional development and networking opportunities to ASAE members (American Society of Association Executives, 2021, Programs). The association's awards and recognition programs honor the work of individual members as well as organizations throughout the association community (American Society of Association Executives, 2021, Awards and Recognition). Finally, the ASAE offers its members career and talent management services including a job board for employers to post and individuals to search for jobs as well as career and recruitment services for both employers and job seekers (American Society of Association Executives, 2021, Association CareerHQ). While the ASAE offers a suite of services and resources for members, it also works on behalf of the association management profession at large.

The ASAE formed the ASAE Research Foundation to advance knowledge within the association management and nonprofit leadership professions (ASAE Research Foundation, 2020, About us). As the research arm of the association, the Research Foundation funds and conducts research in a wide variety of arenas to the benefit of member associations and the greater association community (ASAE Research Foundation, 2020, About us). The foundation's research revolves around three main principles: empowering foresight, defining effective practices, and sustaining association value (ASAE Research Foundation, 2020, About us, para. 2).

The ASAE created the Certified Association Executive (CAE) certification program to "elevate professional standards, enhance individual performance, and

designate individuals who demonstrate the knowledge essential to the practice of association management” (Edwards, 2020, p. 9). First introduced in 1960, the CAE certification is the marker of a committed association professional who has demonstrated the wide range of knowledge essential to manage an association in challenging environments (Edwards, 2020). To earn the CAE credential, an individual must pass a 200-question timed exam covering the following eight domains of knowledge: (a) governance, (b) executive leadership, (c) organizational strategy, (d) operations, (e) business development, (f) member and stakeholder engagement and management, (g) advocacy, and (h) marketing and communications (Edwards, 2020). To sit for the CAE, applicants must meet a set of basic qualifications:

- be employed, currently or within the preceding five years, in a qualifying nonprofit organization or association management company;
- have sufficient qualifying association management work experience;
- have a bachelor’s degree or higher, or meet professional equivalency requirements;
- have completed a minimum of 100 hours of qualifying professional development;
- sign an attestation to uphold ASAE’s standard of conduct; and
- disclose any felony convictions. (Edwards, 2020)

The certifications renewal triennially occurs by completing a minimum of 40 hours of qualifying professional development (Edwards, 2020).

## Organizational Analysis

The American Society of Association Executives (ASAE) is a membership association consisting of individual and organizational members within the association management community. As the association that represents other associations and association professionals, the ASAE holds a unique place in the association space: they do the exact same work as their membership. There is an “association for everything,” so it makes sense that an association for associations exists (American Society of Association Executives, 2021, Association FAQ, para. 1). The ASAE’s role as the association of associations, as illuminated through Bolman and Deal’s (2017) symbolic framework, explained how an organization’s myths and symbols help individuals function in our complex society.

The symbolism inherent in the ASAE, specifically the Certified Association Executive (CAE) certification, embodies the idea of organizational symbolism (Bolman & Deal, 2017). The symbolic frame combines ideas from a variety of disciplines, including organization theory, sociology, and political science among others, to five symbolic assumptions:

- What is most important is not what happens but what it means.
- Events and actions have multiple interpretations since people experience situations differently.
- Symbols help people resolve confusion, find direction, and anchor hope and faith.
- Events and processes are often more important for what they express or signal than for the intent or outcome.

- Culture forms the glue that bonds an organization, unites people, and helps an organization accomplish desired ends. (Bolman & Deal, 2017, pp. 241-242)

The symbolism surrounding the CAE certification, from the structure of the exam content to the pomp and circumstance of celebrating those who pass the exam clearly fit under the umbrella of the symbolic framework.

Symbols are things that stand for something else and convey a meaning beyond their obvious use or meaning (Bolman & Deal, 2017; Zott & Huy, 2007). An organization announces its culture using symbols (Bolman & Deal, 2017). The ASAE uses a lapel pin to symbolize those association professionals that have earned the CAE certification. The pin, typically worn at industry events by CAE certification holders, is a visual, physical symbol of those that have not only passed the exam but have accepted the cultural norms of the ASAE. CAE earners also receive a digital badge to use on social media and email signature blocks to designate the earner as a CAE in a virtual, digital space as well.

An organization's values and vision also serve as symbols of the group's culture. Values serve as the moral underpinnings of an organization that define what the organization stands for and believes (Bolman & Deal, 2017). The organization's vision transforms these lived and shared values into a visualization of the future (Bolman & Deal, 2017). Organizational vision is in a modern society full of competition and distraction (Bolman & Deal, 2017; Collins & Porras, 1994). The ASAE organizational values and vision highlighted in the CAE exam's eight knowledge domains are: (a) governance, (b) executive leadership, (c) organizational strategy, (d) operations, (e) business development, (f) member and stakeholder engagement and management, (g)

advocacy, and (h) marketing and communications (Edwards, 2020). The domains' design is to cover the 119 essential association management competencies identified by the ASAE (American Society of Association Executives, 2021, CAE exam content outline; Edwards, 2020). The ASAE performs an in-depth job analysis every five years to revise the knowledge domains to conform to current knowledge, skills, and competencies required for successful association management (Edwards, 2020). While the knowledge domains and competencies are essential skills, the ASAE also sees them as core values to which association management professionals should aspire (Edwards, 2020). These core values form the basis of the organization's vision of member associations and association professionals transforming society (American Society of Association Executives, 2021, About ASAE).

Some organizations rely on leaders they can use as examples of the best of the best. Bolman and Deal (2017) referred to this concept through the language of heroes and heroines. Organizations and those connected to the organizations view these heroes and heroines as exemplary pillars of the organization that deserve praise and serve as aspirational symbols of achievement (Bolman & Deal, 2017). In the context of the ASAE, association professionals view CAEs in a reverent manner. Designated by the lapel pin, CAE earners have a special recognition ceremony at the organization's annual meeting to honor their achievement as well as physical spaces at in-person events that are only accessible to CAE certification holders. Finally, CAE earners are highly sought after for open positions within the association management community. The ASAE job board even allows job posters to declare their preference for CAE holders (American Society of

Association Executives, 2021, Association CareerHQ). CAE earners hold a place of high regard amongst those associated with the ASAE.

Finally, the use of rituals and ceremonies normalize the celebration of success within an organization (Bolman & Deal, 2017). These regular and predictable gatherings can provide order and clarity for members of the organization (Bolman & Deal, 2017). The ASAE stages a large ceremony at their annual meeting and exposition to honor all new CAE earners. Each recipient during a general session of the conference receives the CAE lapel pin. This very public ceremony to anoint new CAEs bind the organization together around the common values and vision embodied by the CAE certification.

The symbolic framework emphasizes the tribal nature of an organization while using symbols to place meaning on the work and accomplishments of the organization and its members. With the CAE lapel pin and the CAE award ceremony, the ASAE visually and publicly reaffirmed the core values and vision that serve as the bind between not only the organization and its members, but also bind between the members themselves. The cohesive nature of these symbols creates a culture that reaches every corner of the organization.

### **Leadership Analysis**

While there is no lack of research on the concept of leadership, that research covers a wide spectrum of opinions, approaches, and outcomes (Northouse, 2019). Digesting and utilizing that breadth of research can be a daunting challenge. Northouse (2019) viewed leadership as “a complex process having multiple dimensions” (p. 1). Viewing leadership as a process requires us to treat it as an interactive transaction between the leader and the followers (Hollander & Julian, 1969; Northouse, 2019).

The leadership dynamics of the ASAE in the context of the Certified Association Executive certification program can be analyzed using the leader-member exchange theory. The leader-member exchange theory views leadership as a two-way relationship focused on the interactions between leaders and followers (Northouse, 2019). Within the leader-member exchange theory followers fall into either the in-group or the out-group (Northouse, 2019). Followers in the in-group have a relationship with the leader based on expanded or negotiated responsibilities and generally experience a relationship with the leader that sees them receive more information, influence, and confidence because they are viewed as more dependable and involved (Dansereau et al., 1975; Northouse, 2019). Those followers in the out-group, on the other hand, have a relationship based on the formal employment affiliation with the leader, are less compatible with the leader, and are not interested in taking on new job responsibilities (Dansereau et al., 1975; Northouse, 2019).

A follower's status in the in- or out-group depends on a few different factors, but the basis of a follower's group is how well they work with the leader and how well the leader works with them (Northouse, 2019). This working relationship is influenced by the personality traits of each party, the follower's willingness to take on new and different roles at work, and the leader's willingness to negotiate for an expanded role for the follower (Dansereau et al., 1975; Graen, 1976; Maslyn et al., 2017; Northouse, 2019; Randolph-Seng et al., 2016). Followers do have the ability to move from the out-group to the in-group and vice versa (Northouse, 2019). The CAE certification program creates in-groups and out-groups within the association world.

Within the association management community, CAE earners can be classified as an in-group. The decision to earn the CAE is an example of individuals choosing to go beyond the bare minimum to grow as a professional and prove they are willing to do more than is asked of them by their associations (Associations Online, n.d.; Edwards, 2020). Unlike licensure requirements placed on certain professions like doctors, attorneys, and teachers, the CAE certification is not required to work in the association management world (Edwards, 2020; International Credentialing & Reciprocity Consortium, n.d.). Earning the CAE, however, signals to both current and future employers a personal commitment to the profession (Edwards, 2020).

Further, CAE earners are often sought out as mentors. A part of the in-group in the association management world, leaders in the industry view CAE certification holders as trustworthy colleagues they can depend on for extra responsibilities such as mentorship (Ilies et al., 2017; Northouse, 2019). Followers seeking to join the in-group in the association world and earn their CAE certification also tend to seek out CAE earners as mentors as well.

The dyadic relationship formed between leaders in the association management realm and those association management professionals that earn their CAE certification is the perfect example of the leader-member exchange theory of leadership. CAE earners are in-group members that have shown they are willing to do more than is required to advance their organization's goals (Associations Online, n.d.; Edwards, 2020; Northouse, 2019). Those in the out-group that do choose to earn their CAE certification struggle to obtain the highest-level positions in the association management profession and do not

receive special attention from their organization's leaders nor leaders within the larger association management sphere (Associations Online, n.d.; Northouse, 2019).

### **Implications for Practice**

These organizational and leadership analyses were relevant as this study was designed to understand the motivations of association management professionals that choose to sit for the CAE certification exam. The motivations behind the decision to attend over 100 hours of professional development, study for and eventually sit for the exam are of concern for leaders in all areas of the association management profession. Not only was this research designed to benefit the American Society of Association Executives as the credentialing organization responsible for the certification program, but it was also constructed to benefit association leaders as they seek to encourage their employees to pursue professional development goals that are both tied to and independent of the CAE certification.

### **Implications for Scholarship**

While there is some literature on the motivations of professional certification earners, none of that literature focuses on those working in the association industry generally nor on the Certified Association Executive exam specifically. Current literature, instead, focuses on the motivations of professional certification holders in general (Albert & Dingham, 2010; Cheng et al., 2011; Fertig, 2011) or on specific careers outside of association management such as (a) project managers, (b) nurses, (c) accountants, (d) teachers, (e) computer engineers, and (f) human resources professionals (Abraham & Boetticher, 2006; Jensen, 2007; Lester & Dwyer, 2012). This research added specific data on the issue of the motivations of association professionals that choose to sit of the CAE

certification while also providing research regarding the motivation of professional certification seekers in general. Further, the use of Houle's (1961) typology provided a framework for analyzing questions of motivation in professional certification seekers that is currently lacking.

### **Summary**

There are approximately 4,500 current CAE certification holders in the United States with 400-500 association professionals sitting for the exam each year (American Society of Association Executives, 2021, CAE FAQs). As the ASAE continues to expand and offer new and diverse program offerings, the CAE certification program remains one of the chief programs of the organization. As competition grows in the professional certification world (Credential Engine, 2019), the ASAE must work harder to reach association professionals and convince them the CAE certification is the correct choice for them. Understanding the motivations of their exam takers allows the ASAE to expand the program and remain a viable source of professional development and growth within the association management profession.

**SECTION THREE**

**SCHOLARLY REVIEW FOR STUDY**

## INTRODUCTION

“Of all the questions that can be asked about continuing learners, the most important is  
‘Why?’”

Cyril O. Houle (1961)

The issuance of professional certifications is not new, but it is certainly on the rise over the last quarter of a century (Credential Engine, 2019). As more organizations confer more certifications upon more earners, it is important to understand why individuals choose to pursue this path. By understanding the motivations of those pursuing professional certifications, educators and trainers can better answer what Houle (1961) described as the most important question in the field of adult education. The study of motivation is an inquiry into the *why* of human behavior (Deci & Ryan, 1985).

Professional certification is the process by which individuals receive recognition for their knowledge, skills, and competency in a particular area of expertise (Cumberland et al., 2018; Fordham & Martinez, 2005; Gilley & Galbraith, 1986; Gleghorn & Gordon, 2012). Typically, certification requires the earner to pass an examination that covers a set of standards or competencies devised by the certification issuer (Adams et al., 2004; Gleghorn & Gordon, 2012). The certification acts as a representation of an impartial, third-party endorsement of the earner’s knowledge and expertise (Cumberland et al., 2018; Stinnett, 2017). Certification usually leads to a credential or title used by the learner to indicate earning the recognition (Stinnett, 2017).

Though sometimes used interchangeably, certification is not the same as licensure. Licensure indicates the legal authority to practice a trade or profession (Stinnett, 2017). Many professions require licensure to work in that particular industry

(Delacruz, 2014), whereas certification is typically voluntary. This study will focus on voluntary professional certifications and not statutorily required licenses.

Voluntary certification is an expanding professional development opportunity in a growing number of fields (Lester & Dwyer, 2012). One study in 2000 estimated the number of voluntary certifications in the United States at just over 1,000 (McKillip & Owens, 2000). A study six years later placed the estimate at approximately 1,600 (Hansen, 2006). The most recent number this researcher could find comes from an expansive 2019 report that identifies more than 730,000 unique credentials offered just in the United States (Credential Engine, 2019). The Credential Engine (2019) accounting of credentials includes more than just certificates offered by traditional professional certification issuers and is surely more wide-ranging than the topic of this research, but it does help quantify the massive breadth of learning opportunities available to the continuing learner in today's market.

Consequently, the purpose of this study was to determine the motivations of association executives to continue their learning by earning the Certified Association Executive (CAE) credential using earner responses to the *Education Participation Survey* (Boshier, 1971). Within this review is an overview of theories of motivation applicable to association executives that choose to continue their learning through completion of the CAE program. This review also includes the critical literature gap related to the specific motivations of these adult learners.

Much of the current literature on professional certifications focuses on the benefits of certification programs to the certification earner and the certifying organization. Earning a professional certification serves as a significant milestone for

many professionals (Delacruz, 2014). Professional certification holders generally benefit from being perceived as having more credibility, more hiring potential and a higher starting salary compared to non-certificated peers in the human resources field (Lester et al., 2011). A similar list of benefits, whether perceived or real, applies to other practitioners such as the safety, health, and environment professionals (Adams et al., 2004), records management professionals (Phillips, 2004), information security professionals (Gleghorn & Gordon, 2012), and those working in the sustainability industry (Keniry, 2020). The benefit to the certifying organization usually revolves around economic factors (Hale, 2011). Specific benefits include membership growth in the organization, increased participation in educational programs and greater brand awareness (Gleghorn & Gordon, 2012; Hale, 2011; Stinnett, 2017).

While there is some literature on the motivations of professional certification earners, none of that literature focuses on those working in the association industry generally nor on the Certified Association Executive exam specifically. Current literature, instead, focuses on the motivations of professional certification holders in general (Albert & Dingham, 2010; Cheng et al., 2011; Fertig, 2011) or on specific careers outside of association management such as (a) project managers, (b) nurses, (c) accountants, (d) teachers, (e) computer engineers, and (f) human resources professionals (Abraham & Boetticher, 2006; Jensen, 2007; Lester & Dwyer, 2012). Further, the researcher did not find literature using Houle's (1961) typology of adult learners to analyze the motivational orientations of professional certification seekers.

Specifically, this scholarly review centers on the theoretical framework of motivation using Houle's (1961) typology of adult learners as a conceptual framework

for determining the motivations of professional certification seekers. This section explores the key concepts of motivation theory (Albert & Dingham, 2010; Cheng et al., 2011; Fertig, 2011), Houle's (1961) typology and existing literature related to those that seek professional certifications. The researcher synthesizes and critiques quintessential concepts from past studies, peer-reviewed journals, books, and articles to provide context for the current study.

### **Theoretical Framework of Motivation**

The study of motivation can trace its roots to 4<sup>th</sup> century B.C. Greek philosophers Socrates and Aristotle who were interested in the impetus of human behavior (Beck, 2004; Boring, 1950; Petri & Govern, 2013). While this discussion of human interaction and reaction has continued throughout history, the theories surrounding motivation have transformed and become more complex (Gollwitzer & Oettingen, 2015). Researchers divide the modern era of motivation theory into what Reeve (2018) noted as three grand theories followed by a collection of mini-theories. The idea of a "grand theory" of motivation recognizes that a single, all-encompassing theory could explain the conceptual underpinnings of human motivation (Graham & Weiner, 2012; Reeve, 2018).

The first grand theory of motivation was based on the concept of will as the ultimate motivational force as described by French philosopher Rene Descartes (Graham & Weiner, 2012; Reeve, 2018). Descartes argued that judgement, a decision on what to do, was an act of the will (Boring, 1950; Kenny, 1972). This belief that will was a motive to act led to the creation of Cartesian dualism (Beck, 2004). The concepts of dualism and "the will" dominated the philosophical study of motivation for more than two centuries, but eventually fell out of favor with researchers (Rand, 1964; Reeve, 2018; Ruckmick,

1936). The rise of the study of physiology led to the decline of the will theory of motivation and led to the rise of motivation's second grand theory: instinct (Reeve, 2018).

Charles Darwin's research and theories on animal behavior provided the basis for the instinct theory of motivation (Beck, 2004; Graham & Weiner, 2012; Reeve, 2018; Richards, 2018). Other theorists built upon Darwin's theories on instinct and began to theorize on instincts inherent in humans (Boring, 1950; Petri & Govern, 2003; Reeve, 2018). Proponents of instinct theory endowed humans with a number of different mental and physical instincts in an effort to explain the causes of human behavior (Beck, 2004; Boring, 1950; Cofer & Appley, 1964; Graham & Weiner, 2012; Reeve, 2018).

Psychologists eventually abandoned the theory of instinct to explain motivation for a more behavioral explanation for human behavior (Graham & Weiner, 2012; Petri & Govern, 2003). This behavioral psychology theme led to the drive theory of motivation.

The concept of drive introduced by Woodworth (1918) and popularized by Hull (1943) in the mid-20th Century (Boring, 1950; Cofer, 1981; Petri & Govern, 2003; Reeve, 2018). The concept of drive protected some aspects of instinct theory while stressing the importance of learning to explain human behavior (Cofer & Appley, 1964; Cofer, 1981). Drive theory argued humans are motivated by a desire to fulfill the physiological needs of the body (Cofer & Appley, 1964; Graham & Weiner, 2012; Petri & Govern, 2003). Drive theory also was the first theory of motivation that attempted to predict behavior, not just explain it (Reeve, 2018; Weiner, 1990). While drive theory dominated the study of motivation in the first half of the 20th Century, it began to fall out of favor as empirical tests revealed concerns about some of the core assumptions within

the theory (Bolles, 1975; Cofer, 1981; Graham & Weiner, 2012; Reeve, 2018). Further, the field of motivation had grown too complex to support one grand theory to explain human behavior (Petri & Govern, 2003; Reeve, 2018; Souders, 2020).

Modern motivation theory has focused on a series of intricate and related mini-theories that recognize a plethora of explanations for human behavior (Cofer, 1981; Locke & Latham, 2014; Reeve, 2018). These modern mini-theories acknowledge the multi-faceted nature of motivation in humans (Deci & Ryan, 1985; Reiss, 2012). The majority of theories and research focuses on values and goals as the main drivers of motivation (Bargh et al, 2010; Eccles & Wigfield, 2002; Ozturk, 2012). This shift from grand theories to mini-theories has allowed the field of motivation theory to branch into various other fields of psychology and has led to a variety of new and exciting discoveries (Reeve, 2018). Much of modern psychology places greater emphasis on cognitive processes and the highly variable nature of human behavior (Cofer, 1981).

### **Variability of Human Behavior**

Beck (2004) explained motivation helps us illuminate the variability of human behavior. More specifically, studying motivation answers the question of why the intensity of behavior varies between individuals and within the same individual at different times (Petri & Govern, 2003; Reeve, 2018; Souders 2020). While we all experience the same basic motivations, we differ in what strengthens those motivations (Cofer, 1981; Reeve, 2018). Understanding the concept and power of motivation can help explain these seemingly contradictory reactions (Souders, 2020). Motivation also helps clarify why action occurs in some instances but not other seemingly identical instances

(Cofer, 1981; Petri & Govern, 2003). The source of the stimuli explains in part the variability of human response to stimuli.

### **Internal and External Sources of Motivation**

The source of motivation can be either internal factors that impel action or external factors that induce action (Beck, 2004; Locke & Latham, 2014; Reeve, 2018). Staw (1976) defined an internal motivation as the value or pleasure associated with an activity as opposed to the goal toward which the activity is directed. Internal motivators can be basic, physiological factors that focus on a person's needs (Petri & Govern, 2003; Reeve, 2018). These primal factors include hunger, pain, or fear. However, internal motivators can also be more complex cognitions or emotions (Reeve, 2018).

Intrinsic factors complement, or potentially counter, stimuli that originate from external forces that provide goals (Petri & Govern, 2003). Extrinsic motivations are typically guided by an instrumental gain or loss (Cerasoli et al., 2014). External factors are not under our control (Beck, 2004). While both intrinsic and extrinsic factors play a role in decision-making, the weight each carries varies based on a number of factors including life stage, the behavior, and the individual involved (Petri & Govern, 2003). Just as reactions to stimuli are variable, so are the definitions of the word motivation.

### **Definitions of Motivation**

The English word "motivation" comes from the Latin "movere" which means "to move" (Beck, 2004). The etymological analysis of the word "motivation" not only provides a historical context for this study but allows us to come to a true understanding of the word. Souders (2000) supported this historical examination arguing that "to be motivated means to be moved into action." Motivations, whether they be intrinsic or

extrinsic, spur us to action (Petri & Govern, 2003). At its most base level, however, motivation is simply about wanting (Baumeister, 2011). What we want and how much we want it drives our actions and reactions. But motivation is not simple and is rarely only about wants.

This study adopted a definition of motivation that aligns with the earliest theories of motivation. Beck (2004, p. 24) defined motivation a “broad theoretical concept that we often use to explain why people . . . engage in particular actions at particular times (p. 24).” A focus on the why and when of motivation allows this researcher to answer the question posed in this study.

### **Considered Conceptual Frameworks**

Reviewed and discarded as potential conceptual frameworks were the following motivation theories. Questions of reliability and the inability to recreate results led to the rejection of these frameworks.

#### **Maslow’s Hierarchy of Needs Theory**

Maslow (1943) developed a theory of motivation that emphasized striving to reach one’s full potential, which he called self-actualization. Maslow argued that all humans had a hierarchy of needs that ranged from the simple physiological needs (hunger, thirst) to the most ethereal needs (Beck, 2004). Maslow identified five sets of goals, or basic needs, that he labeled physiological, safety, love and belongingness, esteem, and self-actualization (Maslow, 1943):

- **physiological needs:** food, water, sleep, and shelter,
- **safety needs:** absence of fear, protection against danger, threat and deprivation, law and order, stability, and emotional and financial security,

- **love and belongingness needs:** giving and receiving love, friendship, and affection; social relationships; belonging, association, and acceptance,
- **esteem needs:** self-esteem (self-respect, need for achievement, strength, confidence, and independence) and esteem from others (reputation, recognition, appreciation, and status)
- **self-actualization needs:** utilize abilities and talents to the fullest, focused on personal growth, and expansion of horizons. (Pardee, 1990; Petri & Govern, 2003; Souders, 2020)

The needs were arranged in a hierarchy of prepotency that required needs at the bottom of the hierarchy (physiological and safety) to be satisfied before an individual could focus on the less prepotent needs (Maslow, 1943). As a need is satisfied, it no longer motivates and allows a person to focus on different needs (Souders, 2020). Over time, Maslow became less rigid regarding the need to wholly fulfill a lower need before moving on to higher order needs (Petri & Govern, 2003; Souders, 2020).

Maslow's belief that humans are inherently good and constantly striving to become the best version of themselves was the basis for a humanistic approach to the study of motivation (Pardee, 1990; Petri & Govern, 2003). Focusing on the concept of growth motivation, Maslow's final basic need of self-actualization was the peak of human growth and achievement (Pardee, 1990; Petri & Govern, 2003). However, Maslow believed few people ever become self-actualized (Beck, 2004). The inability of most to reach self-actualization does call into question the significance such a higher motive plays in motivating behavior (Petri & Govern, 2003). Other researchers have questioned whether self-actualization is indeed a fundamental ultimate goal as Maslow

argued (Berkowitz, 1969; Petri & Govern, 2003; Sheldon et al., 2001). Additional criticisms of Maslow's (1943) hierarchy of needs exist.

Maslow's study of self-actualization faced a major flaw in the area of replicability (Geller, 1982; Petri & Govern, 2003; Schultz, 1977). Many of the individuals Maslow studied as a basis for self-actualization either preferred to remain anonymous or were already deceased making replication of his results practically impossible (Geller, 1982; McLeod, 2020; Petri & Govern, 2003; Schultz, 1977). Beck (2004) went so far as to argue there was "little supporting evidence for Maslow's hierarchy" (p. 30). Cofer and Appley (1964) shared this concern over a lack of empirical evidence.

A second major criticism of Maslow's hierarchy is the existence of individuals who are willing to ignore lower level needs in order to focus on a specific principle or goal (Beck, 2004; McLeod, 2020; Wahba & Bridwell, 1973). These so-called "suicide bombers" are willing to subvert physiological, safety, or social needs to focus on becoming the best version of themselves (Wahba & Bridwell, 1973). Highly creative individuals many times live in poverty their entire lives and disregard lower level needs in order to perfect their craft and achieve self-actualization (McLeod, 2020; Wahba & Bridwell, 1973).

While Maslow's hierarchy of needs has been applied to the adult education context by some researchers (Douglass, 1970; Miller, 1967), the theory's flaws still call into question its applicability to the current research. For these reasons, Maslow's hierarchy of needs theory was not an appropriate fit to be the conceptual framework for the study.

## **McClelland's Need for Achievement Theory**

The early study on the need for achievement began with Murray (1938). Murray believed that individuals could be arranged by the strength of their needs (Miner, 2005; Petri & Govern, 2003; Steers & Porter, 1983). Among his twenty-seven identified physiological needs, there has been a significant amount of research devoted to the need for achievement, commonly represented as nAch (Beck, 2004; Miner, 2005; Petri & Govern, 2003). Murray (1938) defined the need for achievement (nAch) as a desire “to overcome obstacles, to exercise power, to strive to do something difficult as well and as quickly as possible” (p. 80-81).

McClelland (1961), who offered a hedonic interpretation of nAch (Beck, 2004), extended Murray's need for achievement. McClelland believed that needs are learned through experience and environment (Beck, 2004; Cofer, 1972; Pardee, 1990; Souders, 2020). In short, individuals will do what they have been rewarded for doing in the past (Beck, 2004; Gibson, 1979; Reeve, 2018). McClelland's (1961) research led to a set of factors that indicated a high need for achievement in an individual:

- High achievers prefer to take personal responsibility for finding solutions to problems.
- High achievers set moderate goals and take calculated risks.
- High achievers want clear and unambiguous feedback. (McClelland & Johnson, 1984, p. 85)

Researchers have moved away from the formal concept of achievement motivation to a more complex and broader spectrum of motivational constructs (Alderman, 1999; Weiner, 1990). Modern theories focus on cognitive and emotional

variables that can affect an individual's drive to achieve (Bandura, 1997; Graham & Weiner, 1996; Stipek, 1996; Weiner, 1990). The social nature of learning as well environmental factors have become important conceptual underpinnings in the study of achievement motivation (Alderman, 1999). It is no longer enough to analyze a learner based on his/her past experiences.

Further, many researchers have failed to replicate McClelland's (1961) finding partially due to his focus on the subconscious nature of the achievement motive (Locke & Latham, 2014). It is difficult to study the subconscious, and the processes utilized by McClelland and his associates (1984) are unreliable (Lilenfeld et al, 2000; Locke & Latham, 2014). The projective measures used to analyze the tests used by McClelland (1961) are reliant on highly trained scorers that can lead to concerns over scorer reliability (Locke & Latham, 2014; Miner, 2005). These fundamental flaws in the need for achievement theory led to its rejection as the conceptual framework for this study.

### **Conceptual Framework - Houle's Typology of Adult Learners**

Cyril O. Houle's seminal text *The Inquiring Mind* (1961) is widely considered the pioneering study in the classification of adult learner motivational orientation (Gebra, 2010; Gordon, 1993; Morstain & Smart, 1977). Houle's (1961) groundbreaking work was the first study of its kind to focus on the motivations of adult learners as opposed to traditional, younger post-secondary students (Morstain & Smart, 1977).

### **Houle's Methodology**

Houle (1961) conducted interviews with 22 continuing education participants in the Chicago area in an attempt to discern the motivations of adult learners. The participants in the study varied in age (35-65 years old), gender (10 females and 12

males), socioeconomic status and level of education (Houle, 1961). Despite these differences, Houle's study has been criticized for its lack of diversity (Bulluck, 2017), its small sample size (Boshier & Collins, 1985) and its relatively simplified explanation of a complex topic (Boshier & Collins, 1985). Researchers, however, have validated the typology in the following decades (Boshier, 1971; Boshier & Collins, 1985; Burgess, 1971; Sheffield, 1964).

### **Houle's Typology**

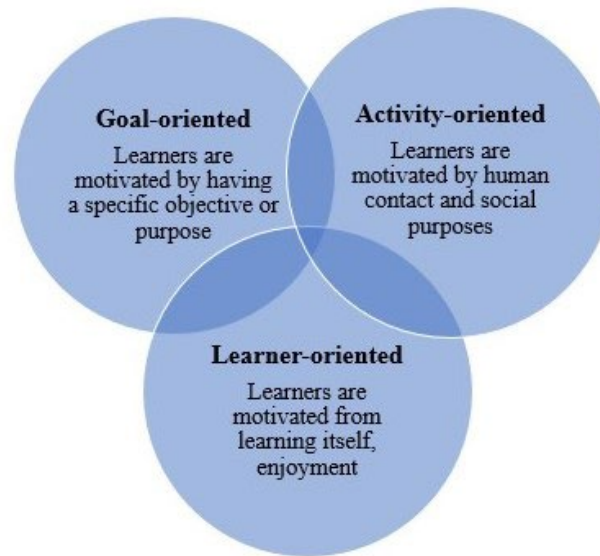
Houle's tripartite typology identified three distinct learner orientations: goal-oriented, activity-oriented, and learning-oriented (Houle, 1961). Houle (1961) argued that each learner type was not pure, but the central emphasis of each type was clear. The best visual representation of the learner types is a Venn diagram of three circles overlapping at the edges shown in Figure 1 (Boshier & Collins, 1985; Gordon, 1993; Houle, 1961). No one orientation is innately better than the others and there are more similarities than differences (Houle, 1961). It is important to understand the differences, however.

### **Goal-Oriented Learners**

Houle (1961) deemed the goal-oriented learners the easiest to understand as their views most closely follow the customary beliefs about education (see Figure 1). Goal-oriented learners participate in continuing education programs as a means of accomplishing clear-cut objectives (Boshier & Collins, 1985; Bulluck, 2017; Gordon, 1993; Houle, 1961). The education of goal-oriented learners is generally episodic and begins with a realization of a need or the identification of an interest (Boshier, 1971; Gordon, 1993; Houle, 1961). Learning is an ever-occurring facet of a goal-oriented

learner's life, but it is not constant nor steady (Boshier, 1971; Gordon, 1993; Houle, 1961).

**Figure 1**



*Note.* A visual representation of Houle's three motivational types and their relationship to each other (Farmer, 2008) with permission.

### **Activity-Oriented Learners**

Activity-oriented learners (see Figure 1) have a variety of reasons for participating in continuing education programs that are unrelated to the distinct purpose or content of the program or course (Houle, 1961). The amount and kind of human relationship is the driving force behind the choice of continuing education (Boshier, 1971; Gordon, 1993). The social opportunities in the educational setting provide opportunities to interact with others (Bulluck, 2017). Houle (1961) offered a non-exhaustive list of factors that lead activity-oriented learners to educational opportunities including companionship, escapism, prestige, and tradition.

## Learning-Oriented Learners

Learning is a constant way of life (see Figure 1) for the learning-oriented (Houle, 1961). These students have a genuine love for learning and view it as a habitual activity (Bullock, 2017). The learning-oriented group differs more significantly from the goal- and activity-oriented learners than they differ from each other (Boshier, 1971; Gordon, 1993; Houle, 1961). Regardless of the learning activity or the learner's reason for engaging in the specific activity, the fundamental purpose is always the desire to know (Houle, 1961). The learning-oriented seem to engage in continuing education simply for learning itself (see Table 1).

**Table 1: Characteristics of Houle's Typology Classifications**

Orientation	Characteristics
Goal-oriented	Begins with realization of need or interest Not steadily or continuously involved in learning Not restricted to specific learning activity or learning center
Activity-oriented	Participates for human connection and interaction Looking for companionship, to escape problems, to continue family tradition, or for a meaningless activity Prestige of program and credential earned can be important
Learning-oriented	Enjoys learning for the sake of learning Education is a constant aspect of life Has a strong desire to know Avid readers that select learning opportunities for educational reasons

Farmer (2008) with permission.

## Expansion of Houle's Research

Since the publishing of Houle's (1961) work the motivational orientations of adult learners has been widely studied, and Houle's typology has been at the center of much of that research. Sheffield (1964) used Houle's typology as a basis for his study on the factors that lead adults to participate in continuing education (Bulluck, 2017; Morstain &

Smart, 1977). Sheffield (1964) surveyed 453 adults participating in 20 continuing education conferences at 8 different universities in the United States (Boshier, 1971; Bulluck, 2017; Burgess, 1971; Sheffield, 1964). Sheffield (1964) identified five factors that influenced the decision-making of respondents: (a) learning orientation, (b) sociability orientation, (c) personal-goal orientation, (d) societal-goal orientation and (e) need-fulfillment orientation (Boshier, 1971; Boshier & Collins, 1985; Bulluck, 2017; Burgess, 1971). Analysis of Sheffield's factors clearly shows the presence of Houle's three orientations (Bulluck, 2017).

Burgess (1971) conducted a similar study of 1,046 subjects involved in 54 different courses, classes or learning activities in St. Louis, MO (Boshier & Collins, 1985; Bulluck, 2017; Morstain & Smart, 1975). Burgess identified seven interpretable factors influencing participation in continuing education. They are (a) the desire to know, (b) the desire to reach personal goals, (c) the desire to reach social goals, (d) the desire to reach religious goals, (e) the desire to take part in social activity, (f) the desire to escape, and (g) the desire to comply with formal requirements (Boshier & Collins, 1985; Bulluck, 2017; Burgess, 1971). As with Sheffield's (1964) factors, Burgess' research confirmed the validity of Houle's typology (Boshier & Collins, 1985).

### **Using Houle as a Conceptual Framework**

While subsequent research has provided clarity to Houle's (1961) original findings, the categories of goal-oriented, activity-oriented, and learner-oriented are still viable (Bulluck, 2017). All learners are goal-oriented to some degree (Boshier, 1971), but there are strong differences in the motivational orientations of adult learners (Bulluck, 2017; Stanley, 1989). Goal and learning orientations remain untouched since Houle's

(1961) original formulation, but subsequent research found the activity orientation to be more complex than first envisioned (Boshier & Collins, 1985). Regardless of modification over time, Houle's typology is still valid as a conceptual framework for the study of adult learner motivations.

### **Review of Extant Literature**

This review of extant literature includes three primary bodies of literature: motivations of professional certification seekers, career stages, and gender and racial inequality in the workplace. Included is the general motivation literature because of a lack of literature regarding these issues specifically in the association management world.

#### **Motivation and Professional Certification Seekers**

The motivation of professional certification seekers is not a new area of study. Generally, this category of adult learner is first inspired to pursue a professional certification to increase their occupational status leading to improved financial or social standing (Albert & Dignam, 2010; Stein & Wanstreet, 2006). Eventually these occupational goals are supplemented or supplanted by the desire to socialize with like-minded professionals and to be challenged intellectually in their chosen profession (Albert & Dignam, 2010). While the specifics might vary based on the professional field, the findings typically fall into one of these categories. Abraham and Boetticher's (2006) analysis of a survey conducted on behalf of the Project Management Institute, a provider of the Project Management Professional certification, identified three main reasons expressed for pursuing the certification: further the applicant's knowledge, advance their career and increase their earning power. These results aligned with Stinnett's (2017)

informal findings revealed that finding a better job and earning more money led project managers to pursue professional certification.

Lester and Dwyer (2012) produced similar findings with their study of professional human resources certifications. The answers of 1,592 respondents to the Human Resource Certification Institute's (HRCI) 2010 Value of Certification Study led to the identification of three specific presumed benefits to human resources certifications:

- Makes an HR professional more marketable,
- Shows the HR professional has mastered the core knowledge of the profession,
- Raises the professional confidence of the HR professional among supervisors and peers. (Lester & Dwyer, 2012)

While Lester and Dwyer (2012) were not able to find empirical evidence to suggest any of these presumed benefits actually come to fruition, they are nonetheless motivating factors for human resources professionals that choose to pursue professional certification.

Jensen (2007) conducted research regarding the motivations of four distinct professions in Norway in an attempt to determine what motivates them to engage in continuous learning. The study of nurses, accountants, teachers, and computer engineers focused mostly on the attainment of knowledge, but also found a complex set of expectations related to a sense of professional duty and a desire for social recognition (Jensen, 2007).

Research (Abraham & Boetticher, 2006; Albert & Dignam, 2010; Jensen, 2007; Lester & Dwyer, 2012; Stein & Wanstreet, 2006; Stinnet, 2017) exists regarding the motivations of those seeking professional certification, but none of that research to date

has focused on the Certified Association Executive certification targeted to individuals working in the association management field. Determining the motivations of these professionals would allow for better marketing of the certification and would allow the certificate sponsor, the American Society of Association Executives, to verify the certification is appropriately tailored to the needs of the target audience (Newman, 1957).

In addition, no current research analyzes the motivations of professional certification seekers through the lens of Houle's (1961) typology. A number of theories have been utilized as a conceptual framework to analyze professional certification seekers including: (a) Human Capital Theory (Lester & Dwyer, 2012; Stinnett, 2017), (b) expert work and knowledge culture (Jensen, 2007), (c) self-determination theory (Stinnett, 2017), and (d) cognitive dissonance (Cheng et al., 2011). However, none of these conceptual frameworks provides a typology by which to categorize these adult learners. Houle's (1961) use of a typology created order in an otherwise chaotic world and provides guidance in the world of adult education (Boshier & Collins, 1985; Strong & Harder, 2010).

### **Career Stages**

Based on the biological life cycle that suggests change and development over time (Hall, 1976; Price, 1993) is the concept of career stages. Each stage is characterized by differences in work attitudes, behaviors, types of relationships, and the aspects of work that are valued (Aryee et al., 1994; Dutta et al., 2019; Peluchette & Jeanquart, 2000; Slocum Jr. & Cron, 1985). Many psychologists have posited different versions of the biological life cycle over the years. Freud's (1949) stages of psychosexual development, while rarely championed in modern psychology, served as the basis of contemporary

psychoanalytic theories of personality development (De Sousa, 2011; Kupfersmid, 2019). Maslow (1943) developed his hierarchy of needs theory based on a person's journey to what he called "self-actualization." Erikson (1950) modified Freud's work and described eight stages of the human life cycle, from infancy to old age, with each stage defined by a crisis the individual must resolve before moving to the next stage of life. Notably, all these theories of life stages revolve around both the physical (age) and psychological (mindset and disposition) characteristics of the individual (Hall, 2002; Price, 1993).

Sociologists have developed a distinctive theory on life cycles that focuses more on social and cultural phenomenon that affect a person's development over time (Price, 1993). The initial sociological career stage theory started with the work of Form and Miller (1949) who identified five discrete, separate stages of an individual's career: (a) preparatory work period, (b) initial work period, (c) trial work period, (d) stable work period, and (e) retirement. Further research in this field noted a variety of sociological impacts on an individual's life span such as social class, gender, and family structure (Blau & Duncan, 1967; Levinson, 1986; Valliant, 1977). Unlike their psychologist colleagues who are more likely to define stages based on age or time, sociologists tend to view life and career stages as more age-independent and task-relevant (Kosine & Lewis, 2008; Wrobel et al., 2003).

### **Life-Span Models**

At its core, theories related to career stages attempt to understand and explain the relationship between the individual employee and the employing organization (Hall, 1976; Hall, 2002; Price, 1993). As such, researchers in the field of organizational psychology began to analyze the concept of life cycle theory through the lens of

employment while focusing on the adult period of human development (Price, 1993, Wrobel et al., 2003). These life-span theories analyze an individual's movement through career stages from a long-term perspective (Kerka, 1998). Super (1957) built upon the psychological and sociological theories on the life cycle to create his initial career stages of exploration, establishment, maintenance, and decline. The exploration stage focused on the individual's attempt to understand themselves and their place in their chosen profession, which leads to obtaining an occupation (Chourasiya & Agrawal, 2019; Kosine & Lewis, 2008; Super, 1957). Super's (1957) stages of establishment and maintenance center on securing a position, pursuing advancement in that position, and then maintaining what they have achieved while pushing for innovative ways to perform their tasks. Finally, the decline/disengagement phase is the period of transition out of the work force typically characterized by declining output and interest in an occupation (Chourasiya & Agrawal, 2019; Kosine & Lewis, 2008; Super, 1957).

Super's (1957) research eventually led to a fifth stage of development called growth that occurred prior to exploration (Savickas, 1997; Super et al., 1996). The life span, life-space theory recognizes that career development continues throughout an individual's lifetime and viewed as a dynamic process (Hartung, 2020; Kosine & Lewis, 2008). Super (1957, 1990) recognized that a wide variety of personal and environmental factors help dictate an individual's movement through career stages. This movement is a personal, unique journey for every individual (Hartung, 2020; Kosine & Lewis, 2008). Not everyone passes through the life span, life-space stages at the same or in the same fashion (Hartung, 2020; Kosine & Lewis, 2008; Wrobel et al., 2003). The life span, life-

space theory still ranks as one of the most influential, empirically supported career theories (Hartung, 2020).

Another leader in field of career theories is Hall (1976, 1996, 2002). Refining the work of his predecessors like Erikson (1950) and Super (1957) to develop his own four stage model of career stages, Hall's (1976) early work emphasized the individuality of career stages while claiming a modern view of careers as a series of decisions that build upon themselves over the course of time (Price, 1993; Wrobel et al., 2003). Hall (1976) originally posited a four-stage career model: (a) exploration and identity, (b) growth and advancement, (c) maintenance and generativity, and (d) maturity. The exploration and identity stage represents workers entering new fields, whether as a first career or as the result of a career change later in life, that are focused on developing skills through experience, training, and coaching (Chourasiya & Agrawal, 2019; Price, 1993). Hall's (1976) growth and advancement phase parallels Super's (1957) establishment phase as a time of mastering skills learned during the beginning career phase while maximizing performance and recognizing their benefit to and effect on the organization (Chourasiya & Agrawal, 2019; Price, 1993). The growth and advancement stage is also a time of learning skills outside of the individual's distinct job responsibilities such as leadership and strategic thinking (Hall, 1976; Price, 1993). The maintenance and generativity stage marks the individual's peak of productivity and is typically when the individual moves into a managerial or supervisory position within the organization (Chourasiya & Agrawal, 2019; Hall, 1976; Heisler et al., 1988; Price, 1993). Workers in the maintenance phase start to consider their legacy, have a strong sense of their professional identity, and begin to mentor the next generation (Chourasiya & Agrawal, 2019; Hall, 1976; Price,

1993). Hall's (1976) fourth and final stage is known as the maturity stage. The maturity phase manifests itself in a high level of respect and authority within the profession while being coupled with a personal decrease in productivity (Chourasiya & Agrawal, 2019; Hall, 1976; Price, 1993).

While researchers like Super (1957), Hall (1976), and others closely tied career stages to age, others were beginning to recognize that other variables also have a strong effect on how an individual moves through career stages. Researchers began to recognize that factors such as family situation (Demerouti et al., 2012; Lansing & Kish, 1957), tenure in the profession (Lorsch & Barnes, 1972), and societal and workforce changes (Price, 1993). One of the major criticisms of early career stage theories is they are based on white, middle-class values and fail to incorporate any real accommodations for gender or race (Arthur et al., 1989; Fitzgerald & Betz, 1994; Leong, 1995; Naidoo, 1998). The growing number of women in the workforce and the increased mobility of workers as compared to the workers of the 1950s and 1960s that tended to work for the same organization their entire career both had a significant impact on how researchers started to analyze career stages (Gallos, 1989; Price, 1993). With the recognition of an altered workforce came new theories on career development that envisioned a variety of career paths.

### **Protean Career Model**

Coined by Hall (1996, 2002), the term "protean career" places the individual at the center of the career journey as opposed to the organization (Gubler et al., 2013; Wrobel et al., 2003). Proteans, individuals that experience a protean career, focus on self-fulfillment and psychological success above traditional career concerns related to the

needs of the organization or organizational commitment (Greenhaus & Callanan, 2006; Gubler et al., 2013). Individuals following a protean career path use self-defined values and goals to structure their career journey that allow for customized careers (Greenhaus & Callanan, 2006; Gubler et al., 2013; Valcour et al., 2007). This study of the “boundaryless career” (Arthur & Rousseau, 1996) changed the focus of career research and forced researchers to study career decisions that included changes in employer (Higgins, 2001) instead of a focus on the “organization man” (Higgins & Dillon, 2007; Wrobel, 2003).

### **Individual Differences Model**

The individual differences model places the focus of research on the individual as opposed to the organization and provides a stronger conceptual understanding of career stages in a time of impermanent organizational connections (Dalton, 1989; Price, 1993; Wrobel et al., 2003). Schein (1978) developed a model that defined five career anchors of an individual’s career journey. Schein’s (1978) work surveying 44 MBA students at MIT in Boston established a pattern of reasons for career decisions (Dalton, 1989; Price, 1993). Schein (1978) identified five primary orientations, or anchors, that characterized individuals’ differences in interests, values, and perceived abilities:

- Technical-functional competence: individuals interested in a specific technical or functional role and are not interested in supervisory or managerial positions,
- Managerial competence: individuals interested in attaining management roles and deemed themselves problem-solvers, leaders, and good under pressure,

- Security and stability: individuals mostly concerned with the stability provided by continued employment who view lifestyle as more important than career achievements,
- Creativity: individuals that made career decisions based on their need to create or invent something new including products, services, or companies, and
- Autonomy and independence: individuals who desire flexibility and the need to control their time and activities. (Dalton, 1989; Price, 1993)

Driver (1982) developed a theory focused on the direction or flow of an individual's career (Dalton, 1989; Price, 1993). Also called a directional pattern model, Driver (1982) argued that individuals viewed their careers as: (1) transitory where no set job or field defines the career, (2) steady-state that remains true to job or field that remains constant (e.g. dentists, doctors, or skilled tradesmen, (3) linear involving upward movement in a given field, or (4) spiral consisting of cyclic movements between different fields (Dalton, 1989; Price, 1993). Individuals will be most satisfied, according to Driver (1982) if they work in organizations with cultures that embrace the same concepts on careers (Weick & Berlinger, 1989).

### **Career Stages and Professional Certification**

This researcher was not able to find any published research relating to the intersection of career development theories and professional certification. Literature exists discussing the interplay of career stage on decisions regarding attendance at professional association meetings (Price, 1993), the role of professional role models and mentors (Gibson, 2003; Peluchette & Jeanquart, 2000), and leadership succession management in higher education (Baker et al., 2018). The lack of research on the effect

of career stage on the decision to pursue a professional certification makes this researcher's pursuit both timely and important.

### **Gender and Career Equality**

Gender inequality in the American workforce is a widely discussed and studied topic (Joshi et al., 2015; Kossek & Buzzanell, 2018; McKinsey and Company and Lean In, 2021). Despite the increased scrutiny in recent decades, women continue to lag behind men in many key economic indicators including roles in top leadership positions (Catalyst, 2021; Fenwick, 2021; McKinsey and Company and Lean In, 2021). A PEW Research Center (2015) study found that half of all Americans believe these gaps persist due to gender bias as opposed to any inherent biological trait or societal pressure to prioritize family over career.

The gender equality gap is both an American and a global phenomenon. The World Economic Forum (2021) currently estimates it will take 135.6 years to close the overall gender gap worldwide and 267.6 years to close the gender gap in economic participation and opportunity worldwide. The key components of this particular gender gap are women in skilled professions, wage equality, and women in leadership positions (World Economic Forum, 2021). The COVID-19 pandemic had a particularly harsh economic impact on women. While global labor force participation figures were already declining for women pre-pandemic, COVID-19 exacerbated that trend (Catalyst, 2021; World Economic Forum, 2021). Less than half of all women worldwide participated in the work force in 2020, and women only represented 38.8% of all workers (Catalyst, 2021). In the United States women have continued to make gains in representation overall but are still promoted to management at lower rates than men and continue to

suffer pay inequality (Catalyst, 2021; Fenwick, 2021; McKinsey and Company and Lean In, 2021). While women make meager gains in career equality in this country, researchers continue to search for answers as to why.

Scholarly definitions of gender equality in the career context typically revolve around two main concepts: equal access to career opportunities and equal career outcomes such as pay, promotions, and satisfaction (Kossek et al., 2017; Parmer, 2021). Gender inequality, therefore, is a form of discrimination against women (Parmer, 2021). Beyond the negative impact of such discrimination on women, gender inequality also has a significant effect on the world economy. The World Economic Forum (2021) continues to cite persistent gender inequality as a significant global economic risk that stunts economic growth. A 30% increase in female representation in key corporate leadership positions could generate a 15% increase in profits (Noland et al., 2016). The business case for a greater female presence in leadership has not led to significant change yet (World Economic Forum, 2021).

The concept of the “career” is inherently gendered (Buzzanell & Lucas, 2006, 2013; Kossek & Buzzanell, 2018). While career theory researchers have expanded their view of careers and the characteristics of workers in the last few years, the underlying themes for most career stage theories still align to the white, male undertones of the early theories (Kossek & Buzzanell, 2018; Mungaray & Curtin, 2021). The result of such gendered language and norms is a body of work that does not recognize non-traditional career paths and varied value systems (Kossek & Buzzanell, 2018). This language also allowed room for the concepts of the ideal worker and ideal leader to form around career models that valued work over non-work and did not contemplate family responsibilities

(Acker, 1990; Eagly & Karau, 2002; Kossek & Buzzanell, 2018; Rhode, 2017). A picture of an ideal leader based on a strong, charismatic, and assertive white, heterosexual male can be detrimental to both women and men (Kossek & Buzzanell, 2018; Mungaray & Curtin, 2021; Rhode, 2017). Organizations and career fields that view and promote leadership through a heteronormative, masculine lens discourage women that do not view themselves as masculine or as embodying masculine ideals from pursuing leadership positions (Bierema, 2016; Mungaray & Curtin, 2021).

In fact, some researchers have taken to blaming women for “opting out” of leadership opportunities (Auster & Prasad, 2016; Bierema, 2016; Hoobler et al., 2014; Rhode, 2017; Sheerin, 2015). While there is at least some validity to the idea that women make different choices than men in their careers (McKinsey and Company and Lean In, 2021; Rhode, 2017), those choices do not tell the entire story when it comes to women’s inability to see equal opportunities for senior leadership positions.

### **Barriers to Leadership for Women**

Instead of advancing in large numbers, women are still facing significant barriers to leadership positions. The first barrier to leadership for women is called the “broken rung.” The broken rung is the initial missed opportunity for women to move into a management position (Ayub et al., 2019; Parmer, 2021; Watson, 2020). Missing that first step into leadership opportunities is a significant setback for women that forces them to play “catch-up” their entire careers (Parmer, 2021). The broken rung makes it less likely women will reach senior-level leadership positions since they begin the ascent up the corporate chain behind their male counterparts (Parmer, 2021; Watson, 2020).

Females that make it past the broken rung then face a barrier into senior leadership known as the “glass ceiling.” The glass ceiling represents several different obstacles that work together to keep women out of key management positions (Ayub et al., 2019; Mungaray & Curtin, 2021; Parmer, 2021). Even though the vast majority of Americans believe men and women make equally competent leaders (PEW Research Center, 2015), women are still severely underrepresented in senior management (Catalyst, 2021; McKinsey and Company and Lean In, 2021; Parmer, 2021; Rhode, 2017). Research (Catalyst, 2005, 2010; Rhode, 2017) suggested the glass ceiling is a barrier constructed around gender bias and not objective qualifications such as education and work experience. Examples of glass ceiling barriers include holding women to higher standards than men (Parmer, 2021; PEW Research Center, 2015; Rhode, 2017), a lack of presumption of competence versus males (Foschi, 1996; Rhode, 2017), and a lack of tolerance for mistakes (Rivers & Barnett, 2015). Female employees with children also tend to face a “motherhood penalty” that comes with a perception of less commitment to work and a drop in competence while male employees with children can actually experience a “fatherhood bonus” that typically comes with an increase in salary (Nadal et al., 2019; Parmer, 2021; Reiners, 2020).

Unfortunately, for women that do finally break through the glass ceiling, the struggle is not over.

Women in senior leadership positions also face a “glass cliff” that makes their grasp on management positions much more tenuous than their male counterparts. The glass cliff represents the concept of women and minorities advancing to leadership positions with a disproportionate chance of failure (Morgenroth et al., 2020; Rhode,

2017; Robinson et al., 2021; Ryan & Haslam, 2005). Many times, the perilous nature of the position is due to the woman appointed during a time of crisis (Glass & Cook, 2020; Morgenroth et al., 2020; Ryan & Haslam, 2005). This tendency to place women in leadership roles during times of crisis explains gender stereotypes that view women as having stronger interpersonal skills and collaborative leadership styles that are deemed necessary during a crisis (Morgenroth et al., 2020; Rhode, 2017; Ryan et al., 2016). Beyond this think crisis-think female association (Ryan et al., 2016), some organizations appoint women (and other members of underrepresented groups) to leadership positions during crisis as a show of change (Kulich et al., 2015; Morgenroth et al., 2020). Finally, there is at least some research suggesting the glass cliff could be a consequence of bias against women (Morgenroth et al., 2020; Rink et al., 2013; Ryan et al., 2016).

### **Gender and Professional Certification**

As women continue to face barriers to career growth, they are increasingly turning to professional certification in an attempt to close the gender gap (Liu, 2021). The researcher was not able to find any literature specific to the Certified Association Executive certification, however, as this appears to be a gap in the current literature on professional certifications. Conversely, Albert and Dignam's (2010) research into individuals' decisions to participate in professional development programs based on gender is insightful, but it did not show a significant difference in motivations between men and women.

### **Race and Career Equality**

Racial minorities face many of the same barriers to entry and leadership in organizations as females. For instance, black Americans face similar inequality when it

comes to participation in workforce. Black workers are twice as likely to be unemployed than white workers (Weller, 2019; Williams & Wilson, 2019), and those with jobs typically earn less (Roberts & Mayo, 2019; Weller, 2019). The factors contributing to this disparity are both numerous and long running. From violent oppression against successful blacks in the early 1900s to the codified segregation of the Jim Crow South to the continued occupational segregation in America, African-Americans have long faced an uphill climb to career equality (Roberts & Mayo, 2019; Solomon et al., 2019; Weller, 2019). Even when adjusted for education level, black Americans still fare worse in terms of unemployment rate, underemployment rate, and salary (Williams & Wilson, 2019). The current trends in racial inequality have held steady for the last 40 years at least (Roberts & Mayo, 2019; Williams & Wilson, 2019).

Unlike discussions surrounding gender inequality, division exists among Americans when it comes to perceptions of racial inequality in the workplace. A national survey of workers nationwide asked questions related to racial inequality in the workplace (Society for Human Resource Management, 2020). While only 7% of white workers answered they believed racial inequality existed in their workplace, a staggering 35% of black workers answered they had seen evidence of racial inequality (Society for Human Resource Management, 2020). The survey also specifically polled human resource professionals who have a unique vantage point of their organization's culture and biases, but the results were not significantly different. While only 13% of white HR professionals admitted to racial inequality in their workplaces, 49% of black HR professionals reported racial inequality (Society for Human Resource Management, 2020). This new research falls in line with previous studies that found similar disparities

in perceptions of racial inequality between white and black workers (Lewis, 2017; PEW Research Center, 2016). Racial inequality in the workforce is not just limited to workplace participation.

### **Barriers to Leadership for Minorities**

Racial minority workers also face significant barriers to promotion to management positions. Black workers, for instance, face the same broken rung as white, female workers (McKinsey and Company, 2021; Pinsight, 2020). Black workers currently only make up 7% of managers in organizations around the country (McKinsey and Company, 2021), and those disparities in representation grow the higher you look up the corporate ladder (Connley, 2021; Hewlett & Jackson, 2014). Factors beyond the broken rung also contribute to the lack of racial minorities in senior leadership positions.

The stereotypical leader prototype that discourages women from applying for and achieving management positions has a similar effect on minority workers. Organizational leaders are rated more highly by subordinates and superiors when they possess characteristics that align with the rater's beliefs about a prototypical leader (Eagly & Karau, 2002), and research has shown that the prototypical leader persona is based on a white male (Anderson et al., 2019; Kossek & Buzzanell, 2018; Mungaray & Curtin, 2021; Rhode, 2017; Rosette et al., 2008). Minority employees that do not have a self-perception that includes these qualities may face limited access to promotions and senior level leadership positions (Mungaray & Curtin, 2021). Further, non-prototypical leaders are evaluated as lacking the skills, temperament, and credentials expected of leaders (Eagly & Karau, 2002; Glass & Cook, 2020; Rosette et al., 2016).

Minorities are also at risk of facing the glass cliff once they attain a senior leadership position (Glass & Cook, 2020; Morgenroth et al., 2020; Ryan & Haslam, 2005). Minorities are particularly susceptible to glass cliff appointments based on the “signaling change” phenomenon especially in leadership changes precipitated by social factors (Glass & Cook, 2020; Morgenroth et al., 2020). Racial bias is another potential explanation for the emergence of the glass ceiling for minorities (Glass & Cook, 2020; Morgenroth et al., 2020).

### **Minorities and Professional Certification**

There is little professional literature on minorities and professional certification. What does exist, however, suggests that some minorities could use certification programs to “break in” to a profession with significant barriers to entry (Gough & Albert, 2019; Shen, 1997). Similarly, the researcher was not able to find any literature specific to the Certified Association Executive certification as this seems to be a gap in the current literature on professional certifications.

### **Summary**

The Certified Association Executive certification remains an important professional certification for those working in the association management world. While the association world is aware of the certification and its benefits to earners, little is known regarding why association executives choose to pursue the certification. Current research (Abraham & Boetticher, 2006; Albert & Dignam, 2010; Jensen, 2007; Lester & Dwyer, 2012; Stein & Wanstreet, 2006; Stinnet, 2017) on motivation and professional certifications has so far ignored the CAE. The researchers designed this study to use

Houle's (1961) typology of adult learners to explore those motivations and attempt to determine why association executives continue to pursue this certification.

This review of extant literature also assesses pertinent literature on the intersection of career development theory, gender, and race with professional certification. While there is significant literature regarding career stages, gender, and race as those things relate to organizational hierarchy, there remains a gap in the literature with respect to earning professional certifications. The current research provides unique and pertinent information on all three topics.

**SECTION FOUR**

**CONTRIBUTION TO PRACTICE**

## **Introduction**

The researcher's goal for this study was to determine the motivations of association management professionals that chose to sit for the CAE certification and to determine if there were significant differences in those motivations amongst certain demographics. The researcher conducted the study by distributing an electronic survey nationwide to association management professionals and asking them to answer a series of 42 questions designed to uncover their motivations.

Provided first is a brief overview of the setting and participants. Next discussed are the findings, discussion, and conclusions. In addition, included is the executive summary of the inquiry association members will receive. The executive summary is a two-to-three-page format touted as the essential part of the study that focuses on the results and findings (Grob, 2015). The executive summary will include enough information for the reader to understand the study without reading the full report.

### **Study Setting**

The researcher conducted this study throughout the United States. With association professionals living and working across the country, the researcher distributed the EPS survey electronically to reach as many prospective respondents as possible. The American Society of Association Executives (ASAE) reports approximately 4,500 active CAE certifications across the country (American Society of Association Executives, 2015).

Association management professionals work in a wide variety of settings and organizations. From traditional non-profits to membership associations, trade associations, and association management companies, the association management

profession takes on many forms (American Society of Association Executives, 2021, Membership). The ASAE is a membership organization made up of association management professionals (American Society of Association Executives, 2021, About us). The majority of Certified Association Executive professional certification holders are members of the ASAE (American Society of Association Executives, 2015).

### **Participants**

An electronic survey was the quantitative data collection tool used for this study. The researcher used a variety of methods to distribute the survey to association management professionals across the country. Respondents were individuals that had taken the certification exam regardless of the results of the exam. By expanding the scope of participants to all those association management professionals that have taken the exam, the researcher procured a more in-depth analysis of the motivations of those that have chosen to sit for the certification.

The researcher administered the survey during the winter of 2021-2022 using this varied distribution strategy. Four hundred and ninety five respondents participated in the survey, but only 490 of the respondents completed the entire survey.

Provided in Table 2 are the descriptive demographic findings. Respondents self-identified their gender, race, and career stage at the time they sat for the CAE. Almost three-quarters of respondents self-identified as female (73.7%). One quarter of the remaining respondents self-identified as male (25.7%) while just under 1% of respondents selected the “Other than male or female” response. The vast majority of respondents identified themselves as white (88.3%). The remaining 58 respondents identified as black or African American (6%), Hispanic or Latino (2.8%), Asian (1%),

American Indian or Alaska Native (0.4%) or other (1.4%). Just under sixty percent of respondents answered that they were mid-career professionals (6-15 years in the association management profession) at the time they sat for the CAE exam. Almost twenty-seven percent of respondents were veteran professionals (16+ years in the association management profession), while only thirteen percent were new professionals (0-5 years in the association management profession) when they decided to sit for the certification. From the self-identification of the participants, the majority were white, female, and were mid-career professionals (6-15 years in the association management profession) at the time they sat for the CAE exam.

**Table 2**

Descriptive Demographic Findings

	Number	Percent
<b>Gender</b>		
Male	127	25.6
Female	365	73.7
Other than Male or Female	3	0.6
<b>Race</b>		
White	436	88.3
Black/African American	30	6.1
Am. Indian/Alaska Native	2	0.4
Asian	5	1.0
Native Hawaiian/Pac. Isl.	0	0
Hispanic/Latino	14	2.8
Other	7	1.4
<b>Career Stage</b>		
New Professional	67	13.5
Mid-Career Professional	294	59.4
Veteran Professional	134	27.1

*Note.* All demographic information was self-reported by participants. One participant chose not to respond to the racial demographic question. N=490.

## **Results of the Study**

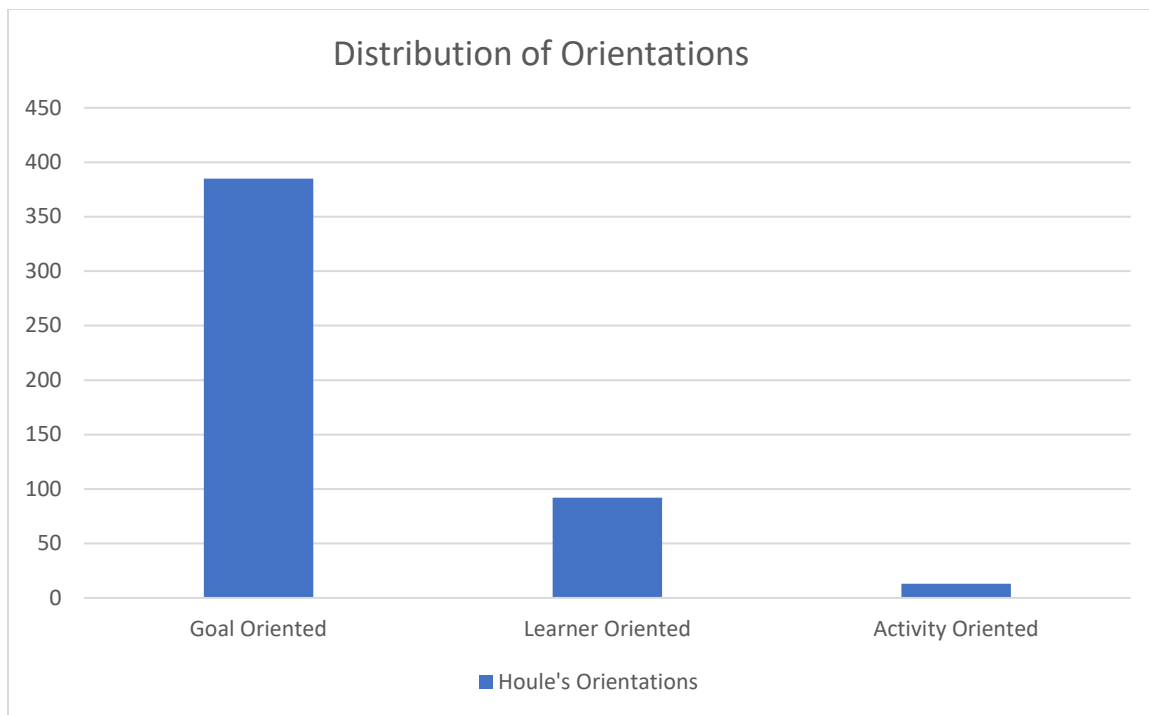
Presented in this section are the results from the administration of the Education Participation Scale (EPS) A-Form and demographic data sheet to association management professionals that have taken the Certified Association Executive (CAE)

certification exam. The data procured by the survey and demographic questions allowed the researcher to answer the research questions presented in this study.

**Research Question 1:** *Is there a significant difference between association professionals that choose to sit for the CAE certification for goal-oriented reasons as opposed to learner-oriented reasons or activity-oriented reasons?*

Shown in Figure 2 is the distribution of goal-oriented, learner-oriented, and activity-oriented learners. Houle (1961) recognized three distinct learner orientations and the researcher used the respondents' responses to Boshier's (1971) EPS A-Form survey to determine which orientation described each respondent. The EPS A-Form survey identified seven unique factors to help classify the respondents. The factors were Communication Improvement, Educational Preparation, Professional Advancement, Cognitive Interest, Social Contact, Family Togetherness, and Social Stimulation. The researcher aligned each of Boshier's (1971) factors to the Houle (1961) orientation to which it best correlated. Designated as goal-oriented factors were Professional Advancement and Communication Improvement. Cognitive Interest and Educational Preparation were designated as learner-oriented factors. Finally, designated as activity-oriented factors were Social Contact, Family Togetherness, and Social Stimulation.

**Figure 2** *Distribution of Houle’s three distinct learner orientations*



*Note.* This figure demonstrates the distribution of Houle’s three distinct learner orientations among the survey’s respondents. Note N=495

Specifically, using Boshier’s (1971) scoring key (Appendix E), each respondent’s answers were given a numerical value with each question falling under one of the seven factors identified above. If the respondent answered “No Influence” to a question, that question received a score of one. If the answer was “Little Influence”, the response scored a two. Answers of “Moderate Influence” received a score of three while “Much Influence” answers received a four. The researcher totaled each respondent’s scores to determine their overall scores for each factor. The researcher was then able to assign each respondent an orientation based on Houle’s (1961) typology by combining the scores for each appropriate factor. If there was a tie between orientations, the researcher used the highest individual factor score to break the tie and assign an orientation to the respondent.

A chi-square goodness of fit test showed a significant difference in frequencies of the three learner orientations,  $\chi^2 (2, N= 490) = 470.355, p = .000$ . Three hundred and eighty-five respondents identified as goal-oriented learners. Ninety-two respondents identified as learner-oriented, while the research identified only 13 activity-oriented learners. The findings suggest that there is a significant difference between association professionals that choose to sit for the CAE certification for goal-oriented reasons as opposed to learner-oriented reasons or activity-oriented reasons. The vast majority of the individuals were goal-oriented learners, followed by learner-oriented learners, and a few that were activity-oriented learners.

**Research Question 2:** *Is there a significant difference in the motivations of male association professionals that choose to sit for the CAE certification compared to female association professionals that choose to sit for the CAE certification?*

Illustrated in Table 3 are the means and standard deviations of the motivational orientations by gender, including F ratios and levels of significance. All motivational orientations factors are low (range 1 to 4) except Professional Advancement and Cognitive Interest. However, the administration of a Wilks Lambda test revealed there was not a significant difference in the motivations of association professionals that choose to sit for the CAE certification based on gender for any of the motivational factors. Because of the statistically insignificant number of responses in the “Other than male or female” category, the researcher focused on the responses for males and females only. Both males and females indicated Professional Advancement as the most significant motivational factor to sit for the CAE certification with an average score of 3.418 for males and 3.389 for females (range 1 to 4). Both groups considered Cognitive Interest the

second most motivating factor followed by Educational Preparation, Social Contact, Communication Improvement, Social Stimulation, and Family Togetherness. The findings suggest that gender did not play a significant role in how the participants perceived motivational factors. However, both males and females perceived professional advancement as the first motivational factor, followed by cognitive interest.

**Table 3**  
*Summary of Mean Scores for Genders*

	Male		Female		Other		F
	M	SE	M	SE	M	SE	
Sig.							
Communication Improvement	1.347	.038	1.296	.022	1.111	.111	.920
.526							
Social Contact	1.386	.042	1.309	.026	1.167	.167	1.306
.209							
Educational Preparation	1.630	.044	1.572	.028	1.333	.333	.886
.561							
Professional Advancement	3.418	.047	3.389	.029	3.0	.577	.694
.759							
Family Togetherness	1.058	.012	1.054	.006	1.0	.000	.919
.515							
Social Stimulation	1.128	.022	1.163	.014	1.167	.167	.225
.997							
Cognitive Interest	2.372	.038	2.427	.039	1.5	.255	1.239
.324							

*Note.* Participants self-reported their gender according to Male, Female, or Other Than Male or Female. N=495

**Research Question 3:** *Is there a significant difference in the motivations of white and non-white association professionals that choose to sit for the CAE certification?*

Provided in Table 4 are the means and standard deviations of the motivational orientations by white and non-white, F ratios, and levels of significance for all motivational factors. Based on a Wilks Lambda test, there was not a significant difference in the motivations of white and non-white association professionals. Both white and non-white respondents indicated Professional Advancement as the most significant motivational factor to sit for the CAE certification with an average score of 3.393 for whites and 3.398 for non-whites (range 1 to 4). Both groups considered Cognitive Interest the second most motivating factor, followed by Educational Preparation. Whites considered Communication Improvement their fourth most motivating factor, with Social Contact ranking fifth. Non-whites reversed that order with Social Contact ranking fourth and Communication Improvement fifth. Both demographics ranked Social Stimulation and Family Togetherness at the bottom. The findings suggest no significant differences based on race, and slight similarities with both ranking professional advancement first.



in the Professional Advancement was also significant  $F(12, 914)= 2.758, p= .001$ .

Interestingly, the significant differences noted in the data related to motivational factors that all three career stages ranked as their most important motivator (Professional Advancement) and their least important motivator (Family Togetherness).

**Table 5**  
*Summary of Mean Scores for Career Stages*

Sig.	New Professional		Mid-Career Professional		Veteran Professional		<i>F</i>
	M	SE	M	SE	M	SE	
Communication Improvement .025	1.374	.058	1.318	.024	1.244	.336	1.929
Social Contact .312	1.399	.063	1.310	.028	1.321	.045	1.154
Educational Preparation .629	1.619	.061	1.60	.032	1.528	.041	.821
Professional Advancement .001	3.437	.068	3.461	.029	3.217	.051	2.758
Family Togetherness .020	1.078	.017	1.062	.008	1.029	.007	2.131
Social Stimulation .490	1.162	.038	1.156	.015	1.138	.022	.956
Cognitive Interest .092	2.409	.087	2.441	.043	2.328	.065	1.527

*Note.* New Professional is defined as 0 to 5 years of association management experience. Mid-Career Professional is defined as 6 to 15 of association management experience. Veteran Professional is defined as 16 or more years of association management experience. N=495

All three career stages listed Professional Advancement as the largest motivating factor in sitting for the CAE certification, followed by Cognitive Interest and Educational Preparation. Mid-career professionals listed Communication Improvement as their fourth most motivating factor, while new and veteran professionals both indicated Social Contact as their fourth most motivating factor. Social Stimulation and Family Togetherness were the least motivating factors for all career stages. The findings suggest

that there are differences based on the career stage of the individual concerning motivational factors, with Professional Advancement the most important, and their least important motivator was Family Togetherness.

### **Discussion of the Findings**

Current research on professional certifications indicates individuals pursue further education as a means of increasing their earning potential or assisting in the search for a promotion or new job (Albert & Dignam, 2010; Delacruz, 2014; Lester et al., 2011; Stein & Wanstreet, 2006). Job postings in the association management profession routinely list the CAE certification as a required or preferred qualification, especially C-suite level jobs such as Executive Director and Chief Operations Officer (American Society of Association Executives, 2021, Association CareerHQ). As such, it makes sense for association management professionals to view the Professional Advancement aspect of the CAE certification as their main motivation for earning the credential.

The prevalence of Professional Advancement as the driving motivation also strongly correlates with the finding that the vast majority of CAE certification seekers categorized themselves as goal-oriented learners under Houle's (1961) typology of adult learners. Goal-oriented learning begins with the realization of a need or interest and manifests that realization in the pursuit of an educational journey that seeks to fulfill that specific need or interest (Boshier & Collins, 1985; Bulluck, 2017; Farmer, 2008; Gordon, 1993; Houle, 1961). For many associations management professionals, this need or interest is the desire to advance in their career, take on greater professional responsibility, and earn more money. Earning the CAE certification is a means of satisfying those needs.

This study's data shows a strong connection between goal-oriented learners and the motivating factor of Professional Advancement.

There was a statistically significant difference in responses to Professional Advancement questions within the different career stages ( $F = 2.758, p = .001$ ). The mean scores on Professional Advancement questions for new professionals (3.437) and mid-career professionals (3.461) were nearly identical, while the coinciding mean score for veteran professionals was demonstrably lower (3.217). This data indicates that while Professional Advancement is an important motivating factor across career stages, the importance does begin to wane later in an association management professional's career.

This finding aligns with previous studies on the motivations of professional certification earners. Albert and Dignam (2010) found career and professional advancement goals shifted towards more social and cognitive goals later in the professional's career. In this study, veteran professionals scored the Professional Advancement motivational factor lower than the new and mid-career professionals. However, they also scored almost every single motivational factor lower than their younger peers. The only exception was a slight and statistically insignificant higher score than mid-career professionals on the social contact factor. While this does seem to fall in line with the work of Albert and Dignam (2010), the difference was not significant enough for the researcher to draw any substantial conclusions.

This study's findings should help the ASAE and other organizations promote the CAE certification as a tool for professional advancement. Currently the ASAE markets the CAE certification program as a commitment to lifelong learning and an "ongoing pursuit of knowledge in the profession" (American Society of Association Executives,

2021, CAE certification FAQs). The only reference to the professional advancement benefits of the CAE is a brief comment regarding “career planning and professional pride” as one of a variety of reasons association management professionals pursue the CAE (American Society of Association Executives, 2021, CAE certification FAQs). This current research does not support this line of promotion, however. Only 18.8% of respondents (92 out of 490) identified as learning-oriented learners that were motivated by a love for learning and commitment to learning new things simply for the knowledge.

Cognitive Interest was the second most motivating factor behind Professional Advancement when using the EPS A-Form to score responses, but the average response was generally a full one point lower than Professional Advancement. The data leads the researcher to suggest the ASAE should focus its marketing and promotion messages more pointedly towards the professional advancement benefits of the CAE certification in order to appeal to the driving motivator of exam takers. While the ASAE is not able to guarantee professional advancement for CAE certification holders, promoting the certification as at least a piece of an association management professional’s career advancement tool belt would align with this study’s finding.

However, while Professional Advancement was clearly the largest motivating factor across all demographics, Cognitive Interest was the second most common motivator across all demographics. Boshier (1971) explained Cognitive Interest as the motivation to learn for learning’s own sake. The items on the EPS A-Form survey that fall under the Cognitive Interest factor are statements such as “To acquire general knowledge,” “To satisfy an inquiring mind,” and “To expand my mind”. All of these questions indicate a general thirst for knowledge, but they can also indicate a recognition

of a lack of skills and knowledge important to the respondent's current or desired job status. The prevalence of Cognitive Interest as a motivating factor to sit for the CAE certification is an indication of a knowledge gap for association professionals when it comes to specific association management skills.

Association management is a career without a well-defined path. A common refrain when talking with association management professionals is the statement, "I just fell into the association world." Many association management professionals begin their professional lives in different careers before finding their way into association work. For instance, there is no clear educational path to association management. Most association management professionals have degrees in business, political science, communication, marketing, or psychology instead of having a degree that is specific to association management (Zippia, 2021). In fact, the researcher was not able to find a single college or university offering a degree program in association management. This lack of post-secondary education directly related to association management creates a knowledge gap that association management professionals must close themselves, and the respondents in this study seem to view the CAE certification as a means of accomplishing that goal.

The data related to mid-career professionals offers an insight into one of the target audiences for the CAE certification. Out of the 495 respondents, 294 were mid-career professionals at the time they sat for the CAE certification. Mid-career professionals, defined in this study as having between 6 and 15 years of experience in the association management profession, indicated the same prevailing motivational factors as all other demographics. However, those in the middle of their association management career recorded the highest score on the Professional Advancement factor. The mid-career

professional in the current study corresponds to Super's (1957) establishment phase of the life-span career model and Hall's (1976) growth and advancement career stage. Both stages represent a time where individuals master skills learned earlier in their career while increasing efficiency and learning new skills outside of their current job to move towards more managerial or supervisory positions. The responses from survey participants that identified themselves as mid-career directly correlate to these recognized career stages.

The motivational factor of Professional Advancement clearly relates to the desires to improve career standing and earning capacity recognized by the life-span models of career growth (Chourasiya & Agrawal, 2019; Hall, 1976; Price, 1993; Super, 1957). Likewise, the pervasiveness of the Cognitive Interest factor connects closely to Super (1957) and Hall's (1976) research that found workers in this stage of their career learning new skills outside of their specific job duties such as leadership and strategic thinking. The content domain structure of the CAE certification program is designed to create well-rounded association executives and requires higher level thinking skills around topics like executive leadership and organizational strategy (Edwards, 2020). These skills specifically are not inherent in most association management jobs outside of the most senior level management positions (Edwards, 2020).

Research on career stages has recognized that individuals are the focus of the career journey and not the organization (Gubler et al., 2013; Hall, 1996, 2002; Wrobel et al., 2003), and these individuals focus on self-fulfillment and personal growth (Greenhaus & Callanan, 2006; Gubler et al., 2013). Organizations and leaders that can recognize this shift in the equation will be better suited to retain their top talent. Offering opportunities

like the CAE certification to employees that are in search of Professional Advancement and Cognitive Interest can potentially head off the loss of top performers and future leaders. As employers in every sector face a growing number of resignations and tight labor markets, providing opportunities for advancement, better pay, and respect in the workplace can go a long way to keeping your workforce happy and engaged (Cook, 2021; Parker & Horowitz, 2022). More specifically, resignation rates for employees between 30 and 45 years of age (generally those individuals that fall into the mid-career category) increased more than twenty percent between 2020 and 2021 (Parker & Horowitz, 2022). This research makes it clear what those employees in the association management profession are looking for and how employers can satisfy those needs.

Just under three-fifths of the survey's respondents self-identified as female. Based on the pervasiveness of gender inequality in the American workforce (Catalyst, 2021; Fenwick, 2021; McKinsey and Company and Lean In, 2021), it is not surprising female respondents listed Professional Advancement as their driving motivation to sit for the CAE certification. Professional certification can be a means to closing gender wage and leadership gaps in America (Liu, 2021). Female respondents to the survey seem to recognize this potential benefit in the CAE certification program. The results underscore the need to understand that female association professionals view the certification as a means of breaking through the glass ceiling (Ayub et al., 2019; Mungaray & Curtin, 2021; Parmer, 2021) and avoiding the glass cliff (Morgenroth et al., 2020; Rhode, 2017; Robinson et al., 2021; Ryan & Haslam, 2005) The CAE certification can provide employers an opportunity to offer advancement options that seem to elude many women in the current professional environment.

The lack of non-white responses to the survey could be a symptom of the shortage of minorities working in the association management profession. Across all sectors of the economy, minorities face challenges entering and remaining in the workforce while earning less than their white counterparts once they get there (Roberts & Mayo, 2019; Weller, 2019; Williams & Wilson, 2019). Racial minorities also face significant barriers to upwards mobility in their professions (McKinsey and Company, 2021; Pinsight, 2020) and the lack of respondents in this inquiry reflects this trend.

Prior research suggests minorities view professional certification as a means of entry to professions that are not historically diverse (Gough & Albert, 2019; Shen, 1997). The fact that non-white association management professionals scored Professional Advancement as their top motivator for pursuing the CAE certification seems to provide a similar result to previous research on the topic. The ASAE, other organizations providing CAE-related programs and services, and employers could all use this motivation as a tenet in their diversity, equity, inclusion, and accessibility initiatives. Minority association management professionals already view the CAE certification as an opportunity to advance their careers, so it makes sense for these entities to draw upon that motivation in an attempt to break down barriers for minorities in the association management profession.

### **Implications**

Determining the motivations of association professionals that sit for the CAE will assist in understanding how association leaders can influence the growth and development of the association profession and its future leaders. The data obtained by

this study sheds light on the specific motivations of association professionals and how those motivations vary based on various demographic information.

While the results of the research were illustrative of the various motivational factors surrounding the decision to sit for the CAE certification, there were ultimately only two statistically significant differences in motivation based on the observed demographics, and both of those significant differences manifested in the data related to career stages.

While only two significant differences within each demographic factor existed, the raw data regarding the motivations of association professionals that chose to sit for the CAE certification exam are still useful and relevant. For instance, all respondents, regardless of gender, race, or career stage, were motivated by Professional Advancement factor. Across all demographics the Professional Advancement factor scored between 3.217 and 3.461 (range 1 to 4). Scores for the second highest ranked factor (Cognitive Interest) scored almost a full point lower and averaged between 2.328 and 2.441 (range 1 to 4). It is clear association management professionals view the CAE certification as an important means towards professional advancement. That is true of all genders, races, and career stages.

While the CAE certification is a means of filling in the educational gaps, that is only effective for those individuals that are already in the association management profession. The ASAE's eligibility requirements prohibit those with less than five years of association management experience from sitting for the exam (Edwards, 2020). Restricting the certification to those with five or more years of experience limits newcomers to the profession, as well as those currently outside of the profession

completely, from pursuing greater knowledge of the association management profession at an early stage in their career.

Higher education institutions could also benefit from the evidence of a knowledge gap represented in the study's data. The lack of post-secondary education options specific to association management could represent a significant opportunity for institutions willing to institute degree programs related to the profession. With over 1.3 million people employed by membership and trade associations in the United States, the association management career path has the potential to be a lucrative program for institutions that chose to invest time and money into this field of study (American Society of Association Executives, 2015).

Recognizing that mid-career professionals make up the bulk of the respondents to the survey sheds light on the needs of those choosing to sit for the CAE certification. Association management professionals in the middle stages of their career have mastered the skills of their initial job within the profession, but those that choose to sit for the CAE have recognized a gap in their skill set or started to work towards a move up the executive management chain. As the purveyor of the CAE certification, the ASAE can use this data to target association management professionals in the six to fifteen years of experience demographic and offer the opportunity to acquire new skills and knowledge while eyeing a career move to the C-suite. Likewise, association leaders can use this study's data and results as a means to provide their employees with opportunities to grow professionally and, consequently, be better employees.

While there are, a number of factors leading to the recent surge in resignations across all sectors, recognizing the importance mid-career association management

professionals place on the Professional Advancement and Cognitive Interest factors related to the CAE certification provides employers an opportunity to promote the CAE as a means of retaining these employees.

Similarly to the implications for mid-career professionals, employers and organizations should be using the CAE certification program as a way to recruit and retain a quality female workforce. Women are looking for opportunities to advance their careers and move into leadership positions. This study indicates women in the association management profession see the CAE certification as a means to achieving that goal.

The ASAE's requirement that CAE candidates have five years of association management experience before sitting for the CAE exam might be a cause for the lack of minority representation in the workforce and management and could signal a significantly smaller number of potential respondents for the survey. More importantly, the lack of survey respondents could indicate a severe lack of diversity in the association management profession overall.

### **Opportunities for Future Research**

Although the current study provides a significant amount of data and direction related to the CAE certification program and professional certification in general, there are still opportunities to expand on the body of research in this arena.

#### **Professional Advancement**

The clear leading motivator of respondents in the current survey was Professional Advancement. Across all demographics, the desire to earn more money, get a new job, or advance within the ranks of a company were the driving forces behind the decision to

pursue the CAE certification. While that motivation is clear, what remains a mystery is whether those goals were achieved upon earning the certification. Future research should focus on the actual benefits of earning the CAE. Further, this additional research could identify how those benefits correspond with the motivations evident in the current study.

CAE candidates invest a significant amount of time, effort, and capital into the pursuit of the CAE certification with the hope of career advancement upon passage. Future research into the return on that investment could be indicative of the perceived value of the certification upon receipt. Knowing a certification holder's thoughts on the value of the certification when compared to the investment necessary to earn it would help employers to make qualified decisions on how to assist employees with the CAE journey.

### **Female and Racial Minority Association Professionals**

The researcher recommends further in-depth research related to female and racial minorities based on the results of the current study. Specifically, future research on the success of both demographics' use of the certification to break their respective glass ceilings and glass cliffs would be instructive on the power of the CAE certification within the association management profession. It is clear that both women and racial minorities pursue the CAE certification with professional advancement goals in mind, but the current research does not indicate whether earning the certification provides the perceived benefits.

Further, the lack of minority responses to the survey exposes a potentially serious lack of diversity within the association management profession. While the lack of

responses could certainly be an indictment of the survey's dissemination, further research would be helpful to uncover the extent of the profession's diversity problem.

## Executive Summary Provided to Stakeholders

### A QUANTITATIVE ANALYSIS OF MOTIVATIONS OF ASSOCIATION EXECUTIVES TO EARN THE CERTIFIED ASSOCIATION EXECUTIVE CREDENTIAL

Amy Farmer

Dissertation Advisor: Dr. Barbara N. Martin

<p><b>Purpose of the Study</b></p> <p>The purpose of this study was to identify the most significant motivations that lead association professionals to sit for the Certified Association Executive certification, and the relationship of those motivations to certain demographic variables. The researcher classified certification participants using Houle's (1961) typology of adult learners. Houle's typology categorizes participants based on three learner types (goal-oriented learners, activity-oriented learners, and learning-oriented learners) thus developing a better understanding of CAE candidates and the requisite modernization of the certification as well as the potential marketing strategies that will best reach today's association management professional. This study provides great insight into the mindset of association management professionals interested in professional certification. Whether an organization provides their own certification, offers companion educational services related to the CAE, or convinces their employees to pursue the CAE, knowledge of the significant motivational forces behind the decisions of association professionals provides important direction.</p>		
<p><b>Research Question</b></p> <p>Is there a significant difference between association professionals that choose to sit for the CAE certification for goal-oriented reasons as opposed to learner-oriented reasons or activity-oriented reasons?</p>		
<p style="text-align: center;"><i>Goal-Oriented Learners</i></p> <ul style="list-style-type: none"> <li>● Participate in continuing education programs as a means of accomplishing clear cut objectives (Boshier &amp; Collins, 1985; Bulluck, 2017; Gordon, 1993; Houle, 1961)</li> <li>● Education of goal-oriented learners is generally episodic and begins with the identification of an interest (Boshier, 1971; Gordon, 1993; Houle, 1961)</li> <li>● Learning is an ever-occurring facet of a goal-oriented learner's life, but it is not constant nor steady (Boshier, 1971; Gordon, 1993; Houle, 1961)</li> </ul>	<p style="text-align: center;"><i>Activity-Oriented Learners</i></p> <ul style="list-style-type: none"> <li>● Have a variety of reasons for participating in continuing education programs that are unrelated to the distinct purpose or content of the program or course (Houle, 1961)</li> <li>● Human relationship is the driving force behind the choice of continuing education (Boshier, 1971; Gordon, 1993)</li> <li>● Social opportunities in the educational setting provide opportunities to interact with others (Bulluck, 2017)</li> </ul>	<p style="text-align: center;"><i>Learner-Oriented Learners</i></p> <ul style="list-style-type: none"> <li>● Have a genuine love for learning and view it as a habitual activity (Bullock, 2017)</li> <li>● This group differs more significantly from the goal- and activity-oriented learners than they differ from each other (Boshier, 1971; Gordon, 1993; Houle, 1961)</li> <li>● Regardless of the learning activity or the learner's reason for engaging in the specific activity, the fundamental purpose is always the desire to know (Houle, 1961)</li> <li>● Learning is a constant way of life for the learning-oriented (Houle, 1961)</li> </ul>

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<p style="text-align: center;"><b>Methods</b></p> <p style="text-align: center;"><i>Setting</i></p> <ul style="list-style-type: none"> <li>● A nationwide study of the approximate 4,500 prospective and current CAE certification holders</li> </ul> <p style="text-align: center;"><i>Design &amp; Implementation</i></p> <ul style="list-style-type: none"> <li>● The study was framed from a postpositivist paradigm aligning the importance of objectivity and generalizability while focusing their claims on understandings of truth based on probability instead of certainty (Mertens, 2010).</li> <li>● Data were collected using the <i>Education Participation Scale</i>, a 42 question Likert scale electronic survey explicitly designed to test Houle's (1961) typology of motivation.</li> <li>● To maintain objectivity, the survey was anonymous and spread digitally through networking systems, regional affiliates, blog posts, and newsletters.</li> <li>● Data were sorted and converted using Microsoft Excel and analyzed with SPSS.</li> <li>● Survey results were analyzed using a MANOVA method to investigate the dominant motivations of CAE earners and: <ul style="list-style-type: none"> <li>○ the relationship between the motivations of earners and certain demographic variables,</li> <li>○ Significant was determined at .05 level.</li> </ul> </li> <li>● Supporting data and research were retrieved from peer-reviewed journal articles and online sources.</li> </ul>	<p style="text-align: center;"><b>Results</b></p> <ul style="list-style-type: none"> <li>● Based on the results of the study, there is a significant difference in the frequencies of the three learner orientations.</li> <li>● Significant differences at the .000 level were found between goal-oriented, activity-oriented, and learner-oriented learners.</li> <li>● 385 respondents identified as goal-oriented, 92 respondents identified as learner-oriented, and only 13 respondents identified as activity-oriented.</li> </ul> <p style="text-align: center;"><b>Limitations</b></p> <ul style="list-style-type: none"> <li>● The validity of the research depended on both the participants' clear understanding of the questions and responses and their honesty.</li> <li>● Concern for broad-based appeal for participants when completing a survey received via email or found online due to the lack of researcher-participant relationship.</li> <li>● Electronic collection of data created concerns regarding the ability to strictly control access to the survey.</li> </ul> <p style="text-align: center;"><b>Delimitations</b></p> <ul style="list-style-type: none"> <li>● The EPS A-Form has been validated and results replicated in subsequent studies.</li> <li>● Researcher partnered with groups and individuals that have strong relationships with the proposed participants.</li> </ul>
<p style="text-align: center;"><b>Contribution to Practice</b></p> <ul style="list-style-type: none"> <li>● This research may help the ASAE market and promote the CAE program more effectively and efficiently.</li> <li>● This research may help employers support mid-career, female, and non-white employees meet their professional needs and goals.</li> <li>● The results contribute to research centered on professional certification and motivation.</li> </ul>	<p style="text-align: center;"><b>Future Areas of Research</b></p> <ul style="list-style-type: none"> <li>● Additional studies may explore: <ul style="list-style-type: none"> <li>○ the effect of earning the CAE on professional advancement;</li> <li>○ the return on investment for CAE earners;</li> <li>○ the effect of earning the CAE on female and non-white earners;</li> <li>○ and the lack of racial diversity in the association management community.</li> </ul> </li> </ul>
<p style="text-align: center;"><b>Discussion and Recommendations for Practice</b></p> <p>Based on the results of this study:</p> <ul style="list-style-type: none"> <li>● Professional advancement and cognitive interest were the most prevalent motivational factors for every demographic in the study.</li> <li>● Decision makers may: <ul style="list-style-type: none"> <li>○ market the certification and target potential exam takers by touting the benefit of professional advancement;</li> <li>○ explore opportunities to close the clear knowledge gap in the association management profession;</li> <li>○ and use the CAE certification to fix gender and racial barriers to entry and leadership within the profession.</li> </ul> </li> </ul>	

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<b>Relationship Between the Motivations of Earners and Certain Demographic Variables</b>		
<p>The review of extant literature was directed to three primary bodies of literature: motivations of professional certification seekers, career stages, and gender and racial inequality in the workplace. There is a lack of literature regarding these issues specifically in the association management world. This study represents a newer area of research.</p>		
<i>Career Stages</i>	<b>Demographic Variables</b>	
	<i>Gender</i>	<i>Race</i>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Researcher was not able to find any published research relating to intersection of career development and professional certification.</li> <li><input type="checkbox"/> For this study, career stages were separated into three distinct classifications:               <ul style="list-style-type: none"> <li>o <b>New professional:</b> 0-5 years in the association management profession,</li> <li>o <b>Mid-Career professional:</b> 6-15 years in the association management profession,</li> <li>o <b>Veteran professional:</b> 16 or more years in the association management professional.</li> </ul> </li> <li><input type="checkbox"/> Results and Implications               <ul style="list-style-type: none"> <li>o This study found significant differences in motivations based on career stage for the motivational factors of professional advancement and family togetherness.</li> <li>o The CAE certification could be a factor in avoiding the loss of mid-career staff prevalent in the U.S. over the last two years (Cook, 2021; Parker &amp; Horowitz, 2022).</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> The gender equality gap is both an American and a global phenomenon (World Economic Forum, 2021).</li> <li><input type="checkbox"/> Women generally face both a glass ceiling (Ayub et al., 2019; Parmer, 2021) and a glass cliff (Morgenroth et al., 2020; Rhode, 2017) in the professional workforce.</li> <li><input type="checkbox"/> The small number of participants that self-identified as “Other than male or female” led the researcher to focus solely on male and female responses.</li> <li><input type="checkbox"/> Results and Implications               <ul style="list-style-type: none"> <li>o This study found no significant difference in the motivations based on gender.</li> <li>o Males and females both listed professional advancement and cognitive interest as their main motivating factors.</li> <li>o CAE certification could be a means of closing the gender equality gap in the association management community.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Racial minorities face many of the same barriers to entry and leadership as females though those boundaries are not as generally accepted as gender-based inequities (Society for Human Resource Management, 2020).</li> <li><input type="checkbox"/> More than 88% of survey respondents self-identified as white. The largest non-white demographic was black/African American at just 6%.</li> <li><input type="checkbox"/> Results and Implications               <ul style="list-style-type: none"> <li>o This study found no significant difference in the motivations based on race.</li> <li>o All racial demographics listed professional advancement and cognitive interest as their main motivating factors.</li> <li>o The lack of non-white responses to the survey could indicate a severe lack of diversity in the association management profession.</li> </ul> </li> </ul>

**A QUANTITATIVE ANALYSIS OF MOTIVATIONS OF ASSOCIATION EXECUTIVES TO EARN THE  
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## Summary

Though the survey did not reveal significant differences in motivations amongst the demographic identified by the researcher, the data still provides important information regarding the CAE certification program, the association management professionals that chose to sit for the certification, and the organizations within the association management profession. CAE candidates are motivated by Professional Advancement and Cognitive Interest above all else. This research provides informative data to the association management community and the professional certification world.

**SECTION FIVE**

**CONTRIBUTION TO SCHOLARSHIP**

### **Target Journal**

The *Journal of Leadership & Organizational Studies* (JLOS) is the target journal for an article derived from this research. Understanding and predicting effective leadership of people, groups, and organizations is the purpose of this established journal from SAGE Publishing. *JLOS* recognizes that leadership in organizations can be informal but occurs in the context of people holding and acting within the scope of formal management positions. Thus, the journal seeks to promote scholarship that asks and seeks answers to grand questions, embraces paradox, and challenges traditions, paradigms, and the status quo. The journal is published quarterly in both print and online editions.

### **Rationale**

This query into the motivations of the association leaders who continue their learning and professional development by seeking the association profession's highest credential addresses a knowledge gap in leadership theory. Moreover, understanding the drive of these association professionals is impactful for those hiring the aspiring leaders who will lead the growth and expansion of the often-misunderstood world of associations.

### **Plan for Submission**

This article will be ready upon completion of the Dissertation-in-Practice and the oral defense. Manuscript submissions are electronic and are to be made in Word format.

**Submission-Ready Article for the Journal of Organizational Leadership and  
Organizational Studies**

**Title Page**

A Quantitative Analysis of Motivations of Association Executives to Earn the Certified  
Association Executive credential

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**Abstract**

The Certified Association Executive credential is a professional certification designed to identify association management professionals committed to a wide range of knowledge essential to the management of an association. Though the CAE has existed since 1960, no research exists related to the motivations of those individuals that chose to pursue the certification. The purpose of this study was to identify the most significant motivations that lead association professionals to sit for the Certified Association Executive certification and the relationship of those motivations to certain demographic variables.

The researcher used the *Educational Participation Scale A-Form* to ascertain the motivational factors most relevant to association management professionals that choose to sit for the CAE. The researcher's survey included three demographic questions that

asked participants to self-identify their gender, race, and career stage at the time they sat for the CAE.

The results of this study were organized to answer four research questions that examined these motivations overall and how they related to the demographic data. The study concluded there were not significant differences in motivations amongst the demographics identified by the researcher, but the data did ascertain that the motivational factors of professional advancement and cognitive interest were the prevailing motivators across all demographics.

### **Cover Letter**

This study provides previously unknown data concerning the motivations that drive association management professionals to sit for the Certified Association Executive credential. Across all demographics analyzed in this study, respondents identified professional advancement and cognitive interest as the two most significant motivating factors.

No portions of this data are currently being used in any other papers including those accepted, published, planned or under review. The University of Missouri – Columbia Institutional Review Board did approve this study for human subject research. This paper has never been submitted to *JLOS* for publication nor is it currently under review at any other journals.

### **Introduction**

The study of professional certification has produced research regarding the motivations and benefits of pursuing such credentials. Previous research established that

many professionals pursue certifications as a means of increasing their earning potential or job status (Albert & Dignam, 2010; Stein & Wanstreet, 2006), but this research was not specific to the association management profession in general nor the Certified Association Executive (CAE) certification specifically.

First introduced in 1960, the CAE certification is the marker of a committed association professional who has demonstrated the wide range of knowledge essential to manage an association in a challenging environment (Edwards, 2020). To earn the CAE credential, an individual must pass a 200-question timed exam covering the following eight domains of knowledge: (a) governance, (b) executive leadership, (c) organizational strategy, (d) operations, (e) business development, (f) member and stakeholder engagement and management, (g) advocacy, and (h) marketing and communications (Edwards, 2020). Triennial renewal of the certification requires completion of a minimum of 40 hours of qualifying professional development (Edwards, 2020).

Despite an ever-expanding catalog of professional development opportunities, 400-500 association professionals choose to take the CAE exam every year (American Society of Association Executives, 2021, CAE annual report stats). While the raw data regarding the number of individuals that pursue the certification is illustrative of its significance in the association management world, this data alone did not provide a complete picture of exam takers and their motivations since little is known regarding the reasons association professionals choose to sit for the CAE exam.

The researcher contended that to understand the role of the CAE certification currently, it was imperative to understand the motivations that drive association professionals to sit for the exam. Specifically, the focus of this research was to examine

the motivations of association management professionals that choose to sit for the Certified Association Executive certification and the relationship of those motivations to certain demographic variables..

### **Theoretical Framework**

The theoretical framework for this study was motivation theory. The study of motivation is the study of the various human reactions to stimuli, and the why they have those reactions (Beck, 2004; Deci & Ryan, 1985). Modern motivation theory has focused on a series of intricate and related mini-theories that recognize a plethora of explanations for human behavior and the multi-faceted nature of motivation (Cofer, 1981; Locke & Latham, 2014; Reeve, 2018).

The researcher believed the most appropriate means of exploring the specific motivations of association management professionals that choose to sit for the CAE certification was to classify participants using Houle's (1961) typology of adult learners. While subsequent research has provided clarity to Houle's (1961) original findings, the categories of goal-oriented, activity-oriented, and learner-oriented are still viable (Bulluck, 2017). All learners are goal-oriented to some degree (Boshier, 1971), but there are strong differences in the motivational orientations of adult learners (Bulluck, 2017; Stanley, 1989). Regardless of modification over time, Houle's typology is still valid as a conceptual framework for the study of adult learner motivations.

### **Purpose of the Study**

The purpose of this study was to identify the most significant motivations that lead association professionals to sit for the Certified Association Executive certification

and the relationship of those motivations to certain demographic variables. The researcher designed the study to identify and classify those motivations using Houle's (1961) typology of adult. Using Houle's typology and categorizing participants based on the three learner types (goal-oriented learners, activity-oriented learners, and learning-oriented learners) allowed the researcher to develop a better understanding of CAE candidates and the requisite modernization of the certification as well as the potential marketing strategies that will best reach today's association management professional.

### **Design of the Study**

The researcher framed this inquiry from a postpositivist paradigm because it sought to test theories to understand phenomena encountered in the world (Creswell, 2014). According to Mertens (2010), the postpositive paradigm is the foundation of quantitative research. The data gained from this study came from the *Education Participation Scale*, a 42-question Likert scale survey specifically designed to test Houle's (1961) typology of motivation. A survey of this type correlates with the axiological belief of the postpositivist paradigm by respecting the privacy of the respondent as well as minimizing harm through an informed consent prior to beginning the survey (Mertens, 2010).

The researcher electronically surveyed association professionals who have taken the CAE certification exam regardless of the result of the exam. By crafting the outreach to not only target those that have earned the CAE certification but also those association professionals that have either taken the exam and failed or have contemplated taking the exam without actually sitting for the exam yet, the researcher expanded the pool of potential respondents and increased the likelihood of receiving substantial responses.

Since the researcher did not have access to an exhaustive list of association professionals that have taken the CAE certification exam, the researcher distributed the survey nationwide through a variety of sources including online communities of association management professionals, local and state membership organizations catering to association management professionals, and collaboration with leaders and influencers within the association management community.

The researcher believed the variety of distribution methods guaranteed the greatest geographical reach for the survey and provided the best opportunity to reach the diverse respondents necessary for the research. The use of this varied distribution strategy allowed the researcher to collect 495 responses to the survey and provided a statistically relevant sample size.

The EPS A-Form, created by Boshier in 1991, consists of a list of 42 items that asks the participant to determine the extent to which each listed reason influenced their decision to participate in the education course or program. Each item includes four possible answers using a Likert scale of responses: 1) No influence, 2) Little influence, 3) Moderate influence, or 4) Much influence. Participants are to select one answer for each reason. In addition to the 42-item survey, participants answered three demographic questions at the beginning of the survey. The three demographic questions asked the participant to select the gender, race, and career stage with which they identify. Timeline for survey administration was winter 2021-2022.

## Results of the Study

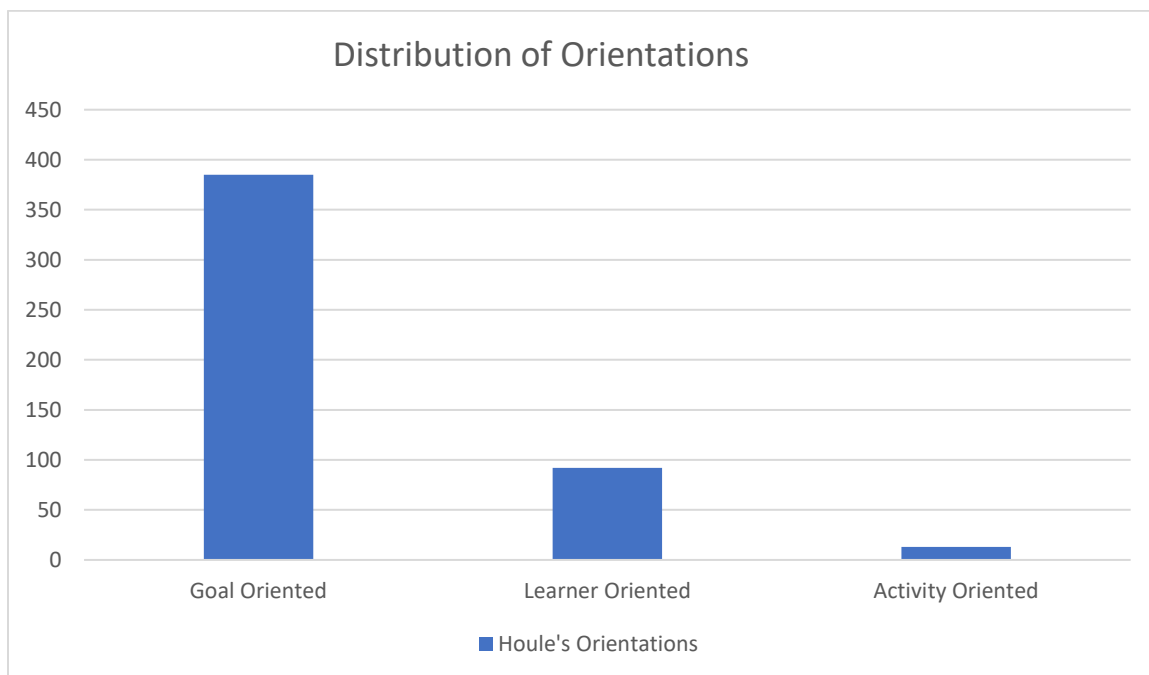
**Research question 1.** *Is there a significant difference between association professionals that choose to sit for the CAE certification for goal-oriented reasons as opposed to learner-oriented reasons or activity-oriented reasons?* Houle (1961) recognized three distinct learner orientations and the researcher used the participants' responses to Boshier's (1991) EPS A-Form survey to determine which orientation described each respondent. The EPS A-Form survey identified seven unique factors to help classify the respondents. The factors were Communication Improvement, Educational Preparation, Professional Advancement, Cognitive Interest, Social Contact, Family Togetherness, and Social Stimulation. The researcher aligned each of Boshier's (1971) factors to the Houle (1961) orientation to which it best correlated. Designated as goal-oriented factors were Professional Advancement and Communication Improvement. Cognitive Interest and Educational Preparation were designated learner-oriented factors. Finally, designated as activity-oriented factors were Social Contact, Family Togetherness, and Social Stimulation.

Specifically, using Boshier's (1991) scoring key (Appendix E), each respondent's answers were given a numerical value with each question falling under one of the seven factors identified above. If the respondent answered "No Influence" to a question, that question received a score of one. If the answer was "Little Influence", the response scored a two. Answers of "Moderate Influence" received a score of three, while "Much Influence" answers received a four. Totaled were each respondent's scores to determine their overall scores for each factor. The researcher was then able to assign each respondent a score based on Houle's (1961) learning orientations by combining the

scores for each appropriate factor as described above. If there was a tie between orientations, the researcher used the highest individual factor score to break the tie and assign an orientation to the respondent. Figure 1 shows the distribution of goal-oriented, learner-oriented, and activity-oriented learners.

A chi-square goodness of fit test showed a significant difference in frequencies of the three levels of orientations,  $\chi^2 (2, N= 490) = 470.355, p = .000$ . Three hundred and eighty-five respondents identified as goal-oriented learners. Ninety-two respondents identified as learner-oriented, while the research identified only 13 activity-oriented learners. The findings suggest there is a significant difference between association professionals that choose to sit for the CAE certification for goal-oriented reasons as opposed to learner-oriented reasons or activity-oriented reasons.

**Figure 1**



*Note.* This figure demonstrates the distribution of Houle's three distinct learner orientations among the survey's respondents.

**Research Question 2:** *Is there a significant difference in the motivations of association professionals that choose to sit for the CAE certification based on their career stage?*

Based on a Wilks Lambda test there were two significant differences in the motivations of association professionals based on career stage. The difference related to Family Togetherness was significant,  $F(10, 910) = 2.131, p = .02$ . Further, the difference in the Professional Advancement was also significant  $F(12, 914) = 2.758, p = .001$ . Interestingly, the significant differences noted in the data related to the motivational factors that all three career stages ranked as their most important motivator (Professional Advancement) and their least important motivator (Family Togetherness). Table 1 presents the means and standard deviations of the motivational orientations by career stage, F ratios, and levels of significance for all motivational factors.

**Table 1***Summary of Mean Scores for Career Stages*

Sig.	New Professional		Mid-Career Professional		Veteran Professional		<i>F</i>
	M	SE	M	SE	M	SE	
Communication Improvement .025	1.374	.058	1.318	.024	1.244	.336	1.929
Social Contact .312	1.399	.063	1.310	.028	1.321	.045	1.154
Educational Preparation .629	1.619	.061	1.60	.032	1.528	.041	.821
Professional Advancement .001	3.437	.068	3.461	.029	3.217	.051	2.758
Family Togetherness .020	1.078	.017	1.062	.008	1.029	.007	2.131
Social Stimulation .490	1.162	.038	1.156	.015	1.138	.022	.956
Cognitive Interest .092	2.409	.087	2.441	.043	2.328	.065	1.527

*Note.* New Professional is defined as 0 to 5 years of association management experience. Mid-Career Professional is defined as 6 to 15 of association management experience. Veteran Professional is defined as 16 or more years of association management experience.

All three career stages listed Professional Advancement as the largest motivating factor in sitting for the CAE certification followed by Cognitive Interest and Educational Preparation. Mid-career professionals listed Communication Improvement as their fourth most motivating factor while new and veteran professionals both indicated Social Contact as their fourth most motivating factor. Social Stimulation and Family Togetherness were the least motivating factors for all career stages. The findings suggest that there are differences based on the career stage of the individual concerning motivational factors, with Professional Advancement the most important and their least important motivator was Family Togetherness.

## Discussion of the Findings

The prevalence of Professional Advancement as the driving motivation strongly correlates with the finding that the vast majority of CAE certification seekers categorized themselves as goal-oriented learners under Houle's (1961) typology of adult learners. Goal-oriented learning begins with the realization of a need or interest and manifests that realization in the pursuit of an educational journey that seeks to fulfill that specific need or interest (Boshier & Collins, 1985; Bulluck, 2017; Farmer, 2008; Gordon, 1993; Houle, 1961). For many association management professionals, this need or interest is the desire to advance in their career, take on greater responsibility professionally, and earn more money. Earning the CAE certification is a means of satisfying those needs. This study's data shows a strong connection between goal-oriented learners and the motivating factor of Professional Advancement.

There was a statistically significant difference in responses to Professional Advancement questions within the different career stages ( $F = 2.758, p = .001$ ). The mean scores on Professional Advancement questions for new professionals (3.437) and mid-career professionals (3.461) were nearly identical, while the coinciding mean score for veteran professionals was demonstrably lower (3.217). This data indicates that while Professional Advancement is an important motivating factor across career stages, the importance does begin to wane later in an association management professional's career.

While Professional Advancement was clearly the strongest motivating factor across all demographics, Cognitive Interest was the second most common motivator across all demographics. Boshier (1971) explained Cognitive Interest as the motivation to learn for learning's own sake. The items on the EPS A-Form survey that fall under the

Cognitive Interest factor are statements such as “To acquire general knowledge,” “To satisfy an inquiring mind,” and “To expand my mind”. All of these questions indicate a general thirst for knowledge, but they can also indicate a recognition of a lack of skills and knowledge important to the respondent’s current or desired job status. The prevalence of Cognitive Interest as a motivating factor to sit for the CAE certification is an indication of a knowledge gap for association professionals when it comes to specific association management skills.

Association management is a career without a well-defined path. A common refrain when talking with association management professionals is the statement, “I just fell into the association world.” Many association management professionals begin their professional lives in different careers before finding their way into association work. For instance, there is no clear educational path to association management. In fact, the researcher was not able to find a single college or university offering a degree program in association management. This lack of post-secondary education directly related to association management creates a knowledge gap that association management professionals must close themselves, and the respondents in this study seem to view the CAE certification as a means of accomplishing that goal.

Research on career stages has recognized that individuals are the focus of the career journey and not the organization (Gubler et al., 2013; Hall, 1996, 2002; Wrobel et al., 2003), and these individuals focus on self-fulfillment and personal growth (Greenhaus & Callanan, 2006; Gubler et al., 2013). Organizations and leaders that can recognize this shift in the equation will be better suited to retain their top talent. Offering opportunities like the CAE certification to employees that are in search of Professional Advancement

and Cognitive Interest can potentially head off the loss of top performers and future leaders. As employers in every sector face a growing number of resignations and tight labor markets, providing opportunities for advancement, better pay, and respect in the workplace can go a long way to keeping your workforce happy and engaged (Cook, 2021; Parker & Horowitz, 2022). More specifically, resignation rates for employees between 30 and 45 years of age (generally those individuals that fall into the mid-career category) increased more than twenty percent between 2020 and 2021 (Parker & Horowitz, 2022).

### **Summary**

Though the survey did not reveal significant differences in motivations amongst the demographics identified by the researcher, the data still provides important information regarding the CAE certification program, the association management professionals that chose to sit for the certification, and the organizations within the association management profession. CAE candidates are motivated by Professional Advancement and Cognitive Interest above all else. This research provides informative data to the association management community and the professional certification world.

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**SECTION SIX**

**SCHOLARLY PRACTITIONER REFLECTION**

## **Introduction**

My journey through the Missouri Statewide Cooperative EdD program has been a time of great reflection and growth, both personally and professionally. Unchallenged and unhappy at my current job, I set my sights on the doctoral program and trusted it would open new doors for me. I had followed the program from its inception through Dr. Carole Edmonds' journey and several subsequent graduates who followed suit. The last two years have both affirmed and altered many of deeply held beliefs, and I am a better leader and citizen of the world thanks to my experiences in this program.

## **Leadership Practice and Theory**

Defining one's leadership style can be both an illuminating and frustrating task. While there is no lack of research on the concept of leadership, that research covers a broad-spectrum of opinions, approaches, and outcomes (Northouse, 2019). Digesting and utilizing that breadth of research can be a daunting challenge. Northouse (2019) viewed leadership as "a complex process having multiple dimensions" (p. 1). Viewing leadership as a process requires us to treat it as an interactive transaction between the leader and the followers (Hollander & Julian, 1969; Northouse, 2019).

My time in the Missouri Statewide Cooperative EdD program has spanned positions in two different organizations: a membership association and a trade association. While both organizations exist in the same association space generally, my roles within them varied greatly. As a member service coordinator with the Missouri State Teachers Association, my role was to serve as the primary voice and face of the association to the membership. I was responsible for the vast majority of the member

contact in my assigned region. My leadership functions were usually limited to my work with district and region-level committees and focused mainly on the membership and local groups as they recruited members or worked within their districts or regions to represent their members.

In March of 2020, I accepted a new role with the American Association of Veterinary State Boards (AAVSB). As the Director of License Mobility for the AAVSB, I lead a department tasked with validating and efficiently transferring veterinary credentials to jurisdictions for new and additional licensure. The department has grown during my tenure at the helm and currently includes five employees that report directly to me. The move into a more traditional leadership position required a true analysis of my leadership style as I manage a team, create a new program from the ground floor, and serve as a senior-level leader in the organization.

### **Authentic Leadership**

I most closely align with the intrapersonal perspective on authentic leadership. The intrapersonal perspective emphasizes the life experiences of the leader and incorporates the leader's self-knowledge, self-regulation, and self-concept (Northouse, 2019). According to Shamir and Eilam's (2005) view of the intrapersonal perspective, authentic leaders "exhibit genuine leadership, lead from conviction and are originals" (Northouse, 2019, p. 198). Over the last three years in the EdD program I have leaned on my life experiences to transition into my leadership role at the AAVSB.

My previous experience as an elementary school principal honed my authentic leadership style, and I have been able to lean on that experience in my current role. The

self-awareness learned as a 25-year-old building principal leading teachers more than twice my age turned me into an honest leader with grounded, realistic goals and expectations of myself and those I lead (Goleman, 1996). As I have hired and trained a relatively young staff at the AAVSB during a global pandemic, I have been aware of the team's limitations and created realistic goals. The significant upheaval caused by the COVID-19 pandemic created struggles previously unseen in the professional world. When our team transitioned to a complete work-from-home mode my team was immediately thrust into an unknown work model that required the perspective honed from my years in school building leadership. While there were certainly bumps along the way, my authentic leadership style allowed the team to transition to a fully remote work model with very little disruption in service for our members.

### **Situational Leadership**

Situational leadership presumes that different situations require different forms of leadership (Northouse, 2019). Developed by Hersey and Blanchard (1969), the theory of situational leadership has been used extensively by organizations in both training and development (Hersey & Blanchard, 1993; Northouse, 2019). A situational approach to leadership contains both directive and supportive elements, and a skilled situational leader can apply each appropriately, depending on what is required now (Northouse, 2019). Directive behaviors focus on accomplishing goals by providing directions, setting timelines, and defining roles. In contrast, supportive behaviors are mostly job-related and include asking for input, praising, sharing information about oneself, and listening (Northouse, 2019).

Situational leadership also requires properly determining your followers' development level by evaluating their competence and commitment to perform their roles (Blanchard et al., 2013; Northouse, 2019). A high development level consists of a follower interested and confident in their work while also having the ability to achieve the goal (Northouse, 2019). A follower's development level will vary depending on the goal being pursued and is not a static descriptor.

I believe I am currently displaying the flexibility required by the situational leadership approach in my role with the American Association of Veterinary State Boards. Less than a year into my tenure with the AAVSB, I was given supervisory responsibilities over a struggling department. The department has historically been focused on outputs instead of outcomes and is beset by inefficient processes and poor communication. It quickly became apparent that at least one member of the department is at a low development level. Based on Blanchard et al.'s (2013) characterization of development levels, she is a D2 follower. She currently exudes some level of competence related to her current role with the association but has a severe lack of commitment.

Based on the situational leadership studies during the previous three years, I have adjusted my leadership style to the S2 model known, as high directive-high supportive style (Blanchard et al., 2013; Northouse, 2019). Also referred to as a coaching approach, the S2 model requires the leader to focus on both achieving goals and meeting the follower's needs as an employee (Northouse, 2019). While the leader must still decide how and when a goal is achieved, the process must be interactive and allow the follower to provide input and take ownership of the outcome (Northouse, 2019). I continue to

adapt to the situation in front of me and continually try to provide this employee with the right amount of direction and support as we adjust to this new organizational hierarchy.

Overall, I have found authentic leadership to be the leadership style that feels most true to my personality, sensibilities, and core values. The experiences of my life, whether professional or personal, good or bad, shape who I am as a leader. I utilize those experiences and my reactions to those experiences to influence how I lead others. I also employ situational leadership as a means of remaining flexible in the face of ever-changing challenges. I have used the knowledge gleaned from the doctoral program's curriculum around leadership styles to not only learn more about myself as a leader but to hone those traits and become a better leader.

### **Diversity**

The Missouri Statewide Cooperative EdD program's most significant impact on me as a leader is in the realm of diversity, equity, and inclusion. As society becomes more culturally diverse, organizational leaders must be able to reach, lead, and develop people and their ideas in ways that will appeal across the spectrum. During this program, I have forced myself to confront my biases and recognize new viewpoints and life experiences to make myself a better leader and a better person. In our first summer together, Dr. Hutchinson made a prediction. She told us we would all be different people by the end of the program. I can say without a doubt that is true for me.

I was born and raised in an all-white, rural town of 422 in southwest Iowa. My high school graduating class was 24 people, and 22 of us started together in pre-school. For the majority of my life in that town, there was no diversity. When I was a sophomore

in high school, a new family with an adopted African American foster child my age moved into our small town. While I am embarrassed to admit it now, my first thought, and that of many others, was the excitement about the state titles we would surely now win in football and basketball with an African American on our teams. That was my upbringing. That was my experience with racial diversity at the time. Those state titles never came, but I think it was the first real wake-up call for me and my preconceived notions about race.

My experiences growing up and throughout most of my adult life were deeply rooted in the systems of privilege of the United States (Johnson, 2018). Those systems of privilege are found in all areas of society, so leaders must recognize them and work to dismantle them to lead quality, high-functioning teams (Johnson, 2018; Shapiro & Stefkovich, 2016). As a leader, I must be able to confront privilege for my team to perform at the level I expect. I started that process by learning to recognize my own biases.

The *Implicit Association Test* (IAT) is an evidence-based tool that helps people recognize and understand their implicit biases (Banaji, et al., 2013). The tests I took were enlightening and certainly made me aware of implicit biases within me. As a leader that strives to create a diverse and inclusive environment for my followers and our consumers, I must recognize those biases and "acknowledge that vigilance, even more than good intention, is a defining characteristic of an ethical manager" (Banaji, et al., 2013, p. 131). I regularly confront this concept of vigilance as I navigate my new leadership role at the AAVSB.

## Summary

The Missouri Statewide Cooperative EdD program has been a time of remarkable growth for me. Despite my previous experience and success as a leader in the education world and the business world, this program forced me to confront the fact that there was still room for evolution in my leadership style. I learned long ago that leaders simply could not try to be everything to everyone (Ancona et al., 2007). Authentic leaders demonstrate this by knowing their limitations and being willing to speak to those limitations openly with their followers (Northouse, 2019). That ability to be vulnerable, and to show vulnerability first, allows a leader to build the trust within a team that is so integral to high performance (Lencioni, 2002). I strive to be vulnerable with my followers every day.

While learning to be vulnerable is important, I have also found the ability to be flexible invaluable as a leader. Authentic leaders lean heavily on their sense of values to craft their leadership style (George, 2003; George & Sims, 2007). I cling firmly to my value system in life and leadership. But this program has propagated a strong situational leadership style in me that thrives on flexibility (Northouse, 2019). I have certainly not abandoned my moral compass, but I have learned the importance of being flexible.

It has been more than learning from texts, lectures, and classwork; I have grown from relationships developed with classmates. The conversations, shared experiences, and disagreements have provided growth opportunities that I could not have found elsewhere in my life. I will rely on these relationships as I continue to grow and evolve personally and professionally.

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## APPENDIX A



**Institutional Review Board**  
 University of Missouri-Columbia  
 FWA Number: 00002876  
 IRB Registration Numbers: 00000731, 00009014

310 Jesse Hall  
 Columbia, MO 65211  
 573-882-3181  
 irb@missouri.edu

December 24, 2021

Principal Investigator: Amy Farmer (MU-Student)  
 Department: Educational Leadership-EDD

Your IRB Application to project entitled **A QUANTITATIVE ANALYSIS OF MOTIVATIONS OF ASSOCIATION EXECUTIVES TO EARN THE CERTIFIED ASSOCIATION EXECUTIVE CREDENTIAL** was reviewed and approved by the MU Institutional Review Board according to the terms and conditions described below:

IRB Project Number	2078082
IRB Review Number	351052
Initial Application Approval Date	December 24, 2021
IRB Expiration Date	December 24, 2022
Level of Review	Exempt
Project Status	Active - Exempt
Exempt Categories (Revised Common Rule) 45 CFR 46.104d(2)(i)	
Risk Level	Minimal Risk
HIPAA Category	No HIPAA
	Corrected Consent form
Approved Documents	Recruitment email and newsletter invitation text Electronic Survey

The principal investigator (PI) is responsible for all aspects and conduct of this study. The PI must comply with the following conditions of the approval:

- No subjects may be involved in any study procedure prior to the IRB approval date or after the expiration date.
  - All changes must be IRB approved prior to implementation utilizing the Exempt Amendment Form.
  - Major noncompliance deviations must be reported to the MU IRB on the Event Report within 5 business days of the research team becoming aware of the deviation. Major deviations result when research activities may affected the research subject's rights, safety, and/or welfare, or may have had the potential to impact even if no actual harm occurred. Please refer to the MU IRB Noncompliance policy for additional details.
  - The Annual Exempt Form must be submitted to the IRB for review and approval at least 30 days prior to the project expiration date to keep the study active or to close it.
  - Maintain all research records for a period of seven years from the project completion date.
- If you are offering subject payments and would like more information about research participant payments, please click here to view the MU Business Policy and Procedure: [http://bppm.missouri.edu/chapter2/2\\_250.htm](http://bppm.missouri.edu/chapter2/2_250.htm)

**APPENDIX B**  
**Informed Consent**

**Research Study Title:** A Quantitative Analysis of Motivations of Association Executives to Earn the Certified Association Executive Credential

**Principal Investigator:** Amy J. Farmer

This study is part of a dissertation and is being conducted under the supervision of  
Dr. Barbara N. Martin

Dear Association Professional,

The purpose of this study is to identify the most significant motivations that lead association professionals to sit for the Certified Association Executive certification and the relationship of those motivations to certain demographic variables.

Little is known regarding the reasons association professionals choose to sit for the CAE exam. As the CAE certification continues to evolve, the ASAE needs to maintain its connection with those working in the association management community and those professionals' motivations for pursuing certification. This study is designed to identify and classify those motivations

This survey of 42 questions will take less than 15 minutes to complete. Please note that this survey will be best displayed on a laptop or desktop computer. Some features may be less compatible for use on a mobile device.

Participation is anonymous and voluntary. There will be no personal identifiers associated with your responses. There are no direct benefits to participating in this study. However, there are possible benefits to the association management profession as it will shed light on the motivations of the leaders in the association world.

Completing the survey is your acknowledgment to participate in the survey. You can withdraw at any time by simply leaving the survey.

Thank you for participating in this study.

Amy J. Farmer

If you have questions, concerns, or complaints, contact the researcher, Amy J. Farmer via email at [ajg6b5@mail.missouri.edu](mailto:ajg6b5@mail.missouri.edu). This research has been reviewed and approved by the University of Missouri – Columbia Institutional Review Board (IRB). You can contact them at (573) 882-3181 or [irb@missouri.edu](mailto:irb@missouri.edu)

## APPENDIX C

## Education Participant Survey (EPS) A-Form



# EDUCATION PARTICIPATION SCALE

© Roger Boshier  
1982  
Reprinted, 1992  
Reprinted, 1995  
Reprinted, 2005

## **A-Form**

Published by Learningpress Ltd.,  
3205 West 30th Avenue  
Vancouver, B.C. V6L 1Z5 Canada  
Tel:001-604-263-2073  
Email: [roger.boshier@ubc.ca](mailto:roger.boshier@ubc.ca)

**TO WHAT EXTENT DID THESE REASONS INFLUENCE YOU TO ENROLL  
IN YOUR ADULT EDUCATION CLASS?**

Think back to when you enrolled for your course and indicate the extent to which each of the reasons listed below influenced you to participate. **Circle** the category which best reflects the extent to which each reason influenced you to enroll. Circle **one** category for each reason. Be **frank**. There are no right or wrong answers.

1. To improve language skills	No influence	Little influence	Moderate influence	Much influence
2. To become acquainted with friendly people	No influence	Little influence	Moderate influence	Much influence
3. To make up for a narrow previous education	No influence	Little influence	Moderate influence	Much influence
4. To secure professional advancement	No influence	Little influence	Moderate influence	Much influence
5. To get ready for changes in my family	No influence	Little influence	Moderate influence	Much influence
6. To overcome the frustration of day to day living	No influence	Little influence	Moderate influence	Much influence
7. To get something meaningful out of life	No influence	Little influence	Moderate influence	Much influence
8. To speak better	No influence	Little influence	Moderate influence	Much influence
9. To have a good time with friends	No influence	Little influence	Moderate influence	Much influence
10. To get education I missed earlier in life	No influence	Little influence	Moderate influence	Much influence
11. To achieve an occupational goal	No influence	Little influence	Moderate influence	Much influence
12. To share a common interest with my spouse	No influence	Little influence	Moderate influence	Much influence
13. To get away from loneliness	No influence	Little influence	Moderate influence	Much influence
14. To acquire general knowledge	No influence	Little influence	Moderate influence	Much influence
15. To learn another language	No influence	Little influence	Moderate influence	Much influence
16. To meet different people	No influence	Little influence	Moderate influence	Much influence
17. To acquire knowledge to help with other educational courses	No influence	Little influence	Moderate influence	Much influence
18. To prepare for getting a job	No influence	Little influence	Moderate influence	Much influence
19. To keep up with others in my family	No influence	Little influence	Moderate influence	Much influence

20. To get relief from boredom	No influence	Little influence	Moderate influence	Much influence
21. To learn just for the joy of learning	No influence	Little influence	Moderate influence	Much influence
22. To write better	No influence	Little influence	Moderate influence	Much influence
23. To make friends	No influence	Little influence	Moderate influence	Much influence
24. To prepare for further education	No influence	Little influence	Moderate influence	Much influence
25. To give me higher status in my job	No influence	Little influence	Moderate influence	Much influence
26. To keep up with my children	No influence	Little influence	Moderate influence	Much influence
27. To get a break in the routine of home or work	No influence	Little influence	Moderate influence	Much influence
28. To satisfy an enquiring mind	No influence	Little influence	Moderate influence	Much influence
29. To help me understand what people are saying and writing	No influence	Little influence	Moderate influence	Much influence
30. To make new friends	No influence	Little influence	Moderate influence	Much influence
31. To do courses needed for another school or college	No influence	Little influence	Moderate influence	Much influence
32. To get a better job	No influence	Little influence	Moderate influence	Much influence
33. To answer questions asked by my children	No influence	Little influence	Moderate influence	Much influence
34. To do something rather than nothing	No influence	Little influence	Moderate influence	Much influence
35. To seek knowledge for its own sake	No influence	Little influence	Moderate influence	Much influence
36. To learn about the usual customs here	No influence	Little influence	Moderate influence	Much influence
37. To meet new people	No influence	Little influence	Moderate influence	Much influence
38. To get entrance to another school or college	No influence	Little influence	Moderate influence	Much influence
39. To increase my job competence	No influence	Little influence	Moderate influence	Much influence
40. To help me talk with my children	No influence	Little influence	Moderate influence	Much influence
41. To escape an unhappy relationship	No influence	Little influence	Moderate influence	Much influence
42. To expand my mind	No influence	Little influence	Moderate influence	Much influence



**Please turn over!**

## APPENDIX D

### Education Participation Scale A-Form Prepared for Electronic Distribution

**TO WHAT EXTENT DID THESE REASONS INFLUENCE YOU TO SIT FOR THE  
CERTIFIED ASSOCIATION EXECUTIVE (CAE) EXAM?**

Think back to when you enrolled to sit for the CAE exam and indicate the extent to which each of the reasons listed below influenced you to participate. Indicate the category which best reflects the extent to which reason influenced you to enroll. Indicate *one* category for each reason. There are no right or wrong answers.

1.	To improve language skills	No Influence	Little Influence	Moderate Influence	Much Influence
2.	To become acquainted with friendly people	No Influence	Little Influence	Moderate Influence	Much Influence
3.	To make up for a narrow previous education	No Influence	Little Influence	Moderate Influence	Much Influence
4.	To secure professional development	No Influence	Little Influence	Moderate Influence	Much Influence
5.	To get ready for changes in my family	No Influence	Little Influence	Moderate Influence	Much Influence
6.	To overcome the frustration of day-to-day living	No Influence	Little Influence	Moderate Influence	Much Influence
7.	To get something meaningful out of life	No Influence	Little Influence	Moderate Influence	Much Influence
8.	To speak better	No Influence	Little Influence	Moderate Influence	Much Influence
9.	To have a good time with friends	No Influence	Little Influence	Moderate Influence	Much Influence
10.	To get education I missed earlier in life	No Influence	Little Influence	Moderate Influence	Much Influence
11.	To achieve an occupational goal	No Influence	Little Influence	Moderate Influence	Much Influence
12.	To share a common interest with my spouse	No Influence	Little Influence	Moderate Influence	Much Influence
13.	To get away from loneliness	No Influence	Little Influence	Moderate Influence	Much Influence
14.	To acquire general knowledge	No Influence	Little Influence	Moderate Influence	Much Influence
15.	To learn another language	No Influence	Little Influence	Moderate Influence	Much Influence
16.	To meet different people	No Influence	Little Influence	Moderate Influence	Much Influence
17.	To acquire knowledge to help with other educational courses	No Influence	Little Influence	Moderate Influence	Much Influence

18.	To prepare for getting a job	No Influence	Little Influence	Moderate Influence	Much Influence
19.	To keep up with others in my family	No Influence	Little Influence	Moderate Influence	Much Influence
20.	To get relief from boredom	No Influence	Little Influence	Moderate Influence	Much Influence
21.	To learn just for the joy of learning	No Influence	Little Influence	Moderate Influence	Much Influence
22.	To write better	No Influence	Little Influence	Moderate Influence	Much Influence
23.	To make friends	No Influence	Little Influence	Moderate Influence	Much Influence
24.	To prepare for further education	No Influence	Little Influence	Moderate Influence	Much Influence
25.	To give me higher status in my job	No Influence	Little Influence	Moderate Influence	Much Influence
26.	To keep up with my children	No Influence	Little Influence	Moderate Influence	Much Influence
27.	To get a break in the routine of home or work	No Influence	Little Influence	Moderate Influence	Much Influence
28.	To satisfy an inquiring mind	No Influence	Little Influence	Moderate Influence	Much Influence
29.	To help me understand what people are saying and writing	No Influence	Little Influence	Moderate Influence	Much Influence
30.	To make new friends	No Influence	Little Influence	Moderate Influence	Much Influence
31.	To do courses needed for another school or college	No Influence	Little Influence	Moderate Influence	Much Influence
32.	To get a better job	No Influence	Little Influence	Moderate Influence	Much Influence
33.	To answer questions asked by my children	No Influence	Little Influence	Moderate Influence	Much Influence
34.	To do something rather than nothing	No Influence	Little Influence	Moderate Influence	Much Influence
35.	To seek knowledge for its own sake	No Influence	Little Influence	Moderate Influence	Much Influence
36.	To learn about the usual customs here	No Influence	Little Influence	Moderate Influence	Much Influence
37.	To meet new people	No Influence	Little Influence	Moderate Influence	Much Influence
38.	To get entrance to another school or college	No Influence	Little Influence	Moderate Influence	Much Influence
39.	To increase my job competence	No Influence	Little Influence	Moderate Influence	Much Influence
40.	To help me talk with my children	No Influence	Little Influence	Moderate Influence	Much Influence
41.	To escape an unhappy relationship	No Influence	Little Influence	Moderate Influence	Much Influence
42.	To expand my mind	No Influence	Little Influence	Moderate Influence	Much Influence

**Thank you! Just a few questions about you. Remember – no name required.**

1. Do you identify as:  Male  
 Female  
 Other than Male or Female
  
2. Do you identify as:  White  
 Black or African American  
 American Indian or Alaska Native  
 Asian  
 Native Hawaiian or Pacific Islander  
 Other
  
3. What was your career stage when you sat for the CAE?  
 New Professional (0-5 years in the association management profession)  
 Mid-Career Professional (6-15 years in the association management profession)  
 Veteran Professional (16+ years in the association management profession)

**Many thanks for your cooperation!**

## APPENDIX E

### Education Participation Scale A-Form Scoring Key



**EDUCATION PARTICIPATION SCALE**  
scoring Key for Basic Education Form

ID

In the margin of your questionnaire score "No influence" as 1; "Little influence" as 2; "Moderate influence" as 3; "Much influence" as 4. Next, transfer your score for each item into the open boxes on this page. The score for item 1 is part of "Communication Improvement"; the score for item 2 is part of "Social Contact", and so on. Finally, add the scores in each column to get a total for each factor. Your score on each factor should not be greater than 24 or less than 6.

Item	FACTORS						
	<b>I</b> Communication Improvement	<b>II</b> Social Contact	<b>III</b> Educational Preparation	<b>IV</b> Professional Advancement	<b>V</b> Family Together	<b>VI</b> Social Stimulation	<b>VII</b> Cognitive Interest
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
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35							
36							
37							
38							
39							
40							
41							
42							
<b>TOTAL</b>							

## APPENDIX F

### Permission to use Education Participation Scale A-Form and Scoring Key.

Re: EPS and Scoring Sheet Request



Boshier, Roger <roger.boshier@ubc.ca>  
To: Farmer, Amy (MU-Student)

Reply
 Reply All
 Forward
 ...

Sat 3/20/2021 11:48 AM

Follow up. Start by Monday, March 22, 2021. Due by Monday, March 22, 2021.  
 You replied to this message on 3/23/2021 10:25 AM.  
 This message was sent with High importance.



There is a fee for this.

A solemn promise from you – that we have heard the last from TRUMP.

Good luck.

Cheers, Roger

---

**From:** "Farmer, Amy (MU-Student)" <[ajg6b5@mail.missouri.edu](mailto:ajg6b5@mail.missouri.edu)>

**Date:** Saturday, March 20, 2021 at 6:22 AM

**To:** Roger Boshier <[roger.boshier@ubc.ca](mailto:roger.boshier@ubc.ca)>

**Subject:** EPS and Scoring Sheet Request

**[CAUTION: Non-UBC Email]**

Good Morning Dr. Boshier,

I am an Educational Leadership and Policy Analysis doctoral student at the University of Missouri in Columbia, Missouri. My proposed dissertation title is *What motivates adult professionals in association management to continue their learning by sitting for the Certified Association Exam (CAE)?* My conceptual framework is Houle's typology, and I would like to use your Education Participation Scale Questionnaire as part of my research. Through another dissertation, I learned I needed to order the EPS through you directly. I am writing to ask you the steps to using your questionnaire.

I hope you are well and staying safe, and I look forward to hearing back from you.

Sincerely,

Amy Farmer  
EdD Candidate  
University of Missouri

## VITA

Amy Farmer resides with her family in Lee's Summit, Missouri, a distinct difference from the small rural town of fewer than 450 people she grew up near. She graduated from the now-defunct Farragut High School in 1993. As a first-generation college student, Amy is the first in her family to complete her Doctorate degree. She began her collegiate career in the fall of 1993 at Northwest Missouri State University, earning her Bachelors of Science degrees in Elementary Education and Learning Disabilities in 1997. Amy returned to Northwest Missouri State University, where she graduated with her Master's in Elementary Educational Leadership in April of 2000. She returned to Northwest once again to earn her Specialist in Education in Superintendency in August 2006. In May of 2022, Amy has completed her Doctorate in Educational Leadership and Policy Analysis at the University of Missouri – Columbia. At the university, she examined the adult motivations of association professionals who choose to sit for an executive association credential.

Amy began her professional career immediately following graduation at Horace Mann Laboratory School on the campus of Northwest Missouri State University as the initial learning disabilities teacher starting the school's first through sixth-grade learning disabilities program in January of 1998. She remained there for two years before accepting the elementary principal position at Northeast Nodaway R-V in Parnell, Missouri. After ten years at the helm of the elementary in Parnell, she took the assistant high school principal position at Maryville R-II School District.

Amy left education to pursue a job opportunity in corporate business that spanned more than ten years, an experience that shaped and grew her professionally in ways

education could not. She experienced much success in the corporate structure but longed to find a career that would appease her service-oriented personality; then, she discovered the association world with a position at the Missouri State Teachers Association. After three years there, opportunity knocked and, once again, Amy took a chance, remaining in association management with a Director position with the American Association of Veterinary State Boards. The association world is not often sought out but rather one that someone stumbles into. But, for Amy, it is home.