

# President's Report to the Membership, 2016



Thank you for being a member of the Academy of Human Resource Development. You are part of a unique organization that seeks to lead the HRD discipline through scholarly research and informed practice. We believe in the importance of research and theory, and the impact these processes can have on the improvement of HRD practice. Beyond that, we believe that HRD can impact the lives of individuals across the globe and, in turn, on entire nations. These lofty beliefs help to drive us as both HRD researchers and consumers of HRD research.

By tradition, the President of the AHRD provides an annual report to members at the time of the Conference in the Americas. In this report, I will provide an overview on the AHRD Finances, Membership, Conferences, Journals and Awards, and Board initiatives.

This is the second and concluding year of my term. When I assumed the role of president, I expressed three goals:

1. Continue to address the strategic plan that had been developed and approved by the previous Board;
2. Proactively seek out new ways of meeting the needs of members and extending the reach of the organization;
3. Maintain and improve our fiscal condition.

The 2014-2015 Board members and their respective responsibilities are as follows:

BOARD MEMBER	LEAD	SUPPORT
Jeff Allen	Membership	Professional Development Special Interest Groups
Ross Azevedo	Awards Journals	Membership
Khalil Dirani	Global Strategy and Planning	
Julie Gedro	Task Force on selecting Conference software Conference planning	Conference in the Americas Membership Recruitment and Retention
Rajashi Ghosh	Global Strategy and Planning Mentoring Initiative	
Robin Grenier	Communications Policy Digest Editor Branding	
Holly Hutchins	Professional Development Mentoring Initiative PEN	Special Interest Groups (SIGs) Membership
Ron Jacobs	Global Strategy and Planning Research to Practice Initiative	
Jessica Li	Special Interest Groups (SIGs)	Research to Practice Initiative Professional Development
Wendy Ruona	Conference in the Americas	Journals Awards
Darren Short	Research to Practice Initiative	
Seung Won Yoon	Membership Recruitment and Retention	Conference in the Americas
Kathie Pugaczewski	Executive Director, Ewald Consulting	

## AHRD Finances

The attached document provides the financial statement for the 2014-2015 financial year, which ran from July 2014 to June 2015 (is shown on page 6-7). The net income for the year (all income minus all expenses) was -\$4990.97. This was due, in part, to lower than expected registration at the 2015 Conference in the Americas, which generated \$24,994.21 in income. As in previous years, the main AHRD expenses relate to the management of the Main Office and associated professional fees, \$94,229.25, and to the journals, \$28,349.80. The total AHRD assets (retained earnings) stood at \$262,326.15 at the end of the financial year (up approximately 7.6% from the previous financial year), reflecting the relatively solid financial position of the organization.

The strength of our financial position owes much to the wisdom of our past presidents and boards, and in particular to Darren Short and Darlene Russ-Eft. Through their leadership, the financial situation of the AHRD is at a steady state. In 2014, the Board adopted an investment policy and approved an investment of \$100,000 of our cash assets to a conservative money market program through Wells Fargo Bank. Our Wells Fargo banker specializes in investments for non-profit organizations. At this time, the investment has resulted in modest gains, but the gains exceed what we would otherwise receive through our savings account.

## AHRD Membership

Table 1 on page 5 shows membership trends from 2004 to the present. Our current total membership (as of January 31, 2016) is 530 (with 3 SIGs-only and 3 Emeritus-only memberships), marking a relatively steady number historically.

Under the leadership of Seung Won Yoon, membership retention and engagement continues to be an important issue of concern for the Board. Many of our conversations and initiatives focus on providing greater value for our members, especially our senior scholars and our new scholars. Similar to the statement you hear on most airlines, “We know you have several choices in how you travel,” the Board understands that there are several professional organizations related to our field in which our members might choose to invest their time and resources. We have many conversations among the Board members and with you about “What makes AHRD the preferred professional organization?” From these discussions, we’ve learned a lot about what our members want: more engagement in informal and formal venues, more resources, and more opportunities for development. A few of the 2015 initiatives

underscored our member value offering, with particular emphasis on the new mentoring program being unveiled at this conference. Recognizing the relative volatility of the academic programs, the Board adopted a position statement on membership in 2015. This document sought to coalesce and guide our thinking in this regard.

## Special Interest Groups

The purpose of the SIGs is to engage members, renew levels of membership energy, to be an exciting opportunity for AHRD members to come together and share ideas on meaningful research topics, to provide leadership, and build meaningful networking relationships and friendships. For six years, SIGs have experienced continued growth and evolution. Affiliation with a SIG has grown to 90% of AHRD members, with most members signing up for two or more SIGs.

Under the coordination of Jessica Li, the SIGs continue to provide opportunities for enhancing the experience of members with kindred interests. SIGs have contributed Symposia, Food ‘N Thought sessions, Preconference Workshops, and have served as active track chairs and reviewers during the conference submission process. SIG activities have also expanded members’ networking opportunities, leading to research partnerships, topic-specific webinars, and journal publications.

## Communications

The communication footprint of AHRD continues to improve and expand. This year, the AHRD Digest continued to provide timely information such as member and Board profiles, requests for research participation and highlights of trends and issues important to the AHRD community. In addition, the AHRD Board approved, for the first time, a communications policy to guide our interactions with members and the broader HRD community in general. Robin Grenier continued to serve most admirably as Editor in Chief of the Digest and has provided leadership in various other communications and branding issues.

How can we make the Digest even better? Members and those in AHRD leadership positions are encouraged to contribute. In particular, more contributions from members/SIGs/journal editors and guest contributors and would be welcomed in order to expand the range of content and opinion.

Finally, our digital presence using social media continues to expand. Our AHRD Facebook page had 736 fans at the end of 2015.

## Conferences

### Americas Conference

Under the expert guidance and creative thinking of Wendy Ruona, the 2016 AHRD International Conference in the Americas seeks to continue to serve the needs of HRD scholars globally. For the 2016 annual conference, we have 209 peer-reviewed papers to be presented. In addition, there will be 8 Food 'N Thought Sessions, designed to encourage dialogue and collaboration on emerging ideas.

Finally, the conference will have 9 FOCUS sessions, 28 Interactive Roundtable Sessions, and 11 Professional Development Sessions.

This year, we have solidified some of the changes made for the 2015 conference. In 2014, we reduced the number of tracks to 8 from 13 and we have maintained that same number of tracks this year. We reduced the number of tracks to help manage the distinctiveness and size of each track. Further, track chairs were challenged to not only coordinate the review of the papers in their respective tracks, but also to design and promote innovative sessions that would facilitate greater interaction among participants and speakers. This was a new expectation and is consistent with the Board's goal of providing greater opportunities for interaction among conference attendees.

We have come to recognize the need to balance the number of peer-reviewed papers and innovative sessions as a means to enhance the conference experience. Each Track Chair explicitly understands the need to balance these types of sessions for each track.

Throughout the conference planning, our partners at Ewald Consulting, led by Kathie Pugaczewski and Carissa Wolf, provided much-appreciated collegial support and oversight. Wendy Ruona, as President Elect, served as conference coordinator, overseeing all aspects of conference planning. Our 2017 annual conference will be in San Antonio, Texas, and we are in the process of confirming the 2018 and 2019 sites already.

### AHRD-Affiliated International Conferences

Under the coordination of Mesut Akdere, the AHRD Asian Chapter Coordinator, AHRD continues to organize a highly successful conference in Asia. The 13th International Conference of the Asia Chapter was held in Seoul, Republic of Korea, and the theme was "New Perspectives of HRD and Social Networking in a Globalizing Workplace." Participants of this conference came from many different countries in Asia, the Middle East and North Africa, Europe, Australia, South America, and North America.

Because of unforeseen events, we had to cancel the 14th 2015 Asian Chapter Conference in Macau. This action caused the Executive Board to consider the direction of future Asian Chapter Conferences. The Board has undertaken a process of identifying a partner in the Asia region that would be the focal point for the Asian Chapter. We intend to announce a new management structure and the location of the 2017 conference in the next few months.

The 15th Asian Chapter Conference – rebranded as the 2016 AHRD International Research Conference in Asia and MENA – will be held at the Al Akhawayn University, in Morocco, from November 2-4, 2016. The conference theme is "Promoting Intangible Capital for Economic Growth: National and Organizational Perspectives." This conference offers a unique opportunity to engage with international scholars and enjoy a rare cultural experience.

The University Forum for Human Resource Development (UFHRD) and AHRD continue to collaborate in holding an annual conference in Europe. The 16th International Conference on Human Resource Development Research and Practice across Europe was held from June 3-5, 2015. The 17th International Conference on HRD Research and Practice Across Europe, will be held at Manchester Metropolitan University, June 8-10, 2016. The conference theme will be "Leadership, Diversity and Changing Practices in HRD in a Global Context." This conference continues to engage and attract a wide range of international scholars.

The call for papers for these conferences is available on the AHRD website, within the Events drop-down link.

## AHRD Journals

Under the leadership of Ross Azevedo, the Board recognizes the critical importance of its four journals. As a result, we have made every effort to enhance the quality and impact of our journals through the supportive efforts we can actually make through the Board. AHRD sponsors/co-sponsors the four premier journals in the HRD discipline: Human Resource Development Quarterly, Human Resource Development Review, Advances in Developing Human Resources, and Human Resource Development International.

Three years ago, our Main Office staff worked with the publishers to provide journal access through the AHRD website. This has provided easier access to members along with reduced pricing to AHRD for the journals. That reduction in the costs for the journals has resulted in a reduction in costs for membership for everyone. Furthermore, we

have discovered that surprisingly few of our members have expressed an interest in receiving print copies.

A major question continues to revolve around SSCI ranking for our journals. HRDQ has been included in SSCI and recently HRDR has been included as well. Congratulations to the editors of each journal, their editorial staff members, editorial boards and the manuscript reviewers for their fine work and dedication. We continue to be amazed and impressed by the high quality of our journals.

Given the centrality of research, AHRD has sponsored the Graduate Student Research Colloquium course during the conference in order to support HRD academic programs introducing graduate students to HRD research and the conference.

Conference attendees well know the number of graduate students who attend our conferences. Graduate students in our various programs come from the U.S. and many other places globally. We appreciate their participation in the conferences and they represent an important strategic focus for the Board, as many of them will soon graduate and take on leadership and academic positions globally. Of course, we want them to continue to consider AHRD as their professional home.

### **Program Excellence Network/Mentoring Initiative**

AHRD Board member Holly Hutchins has been working with the Program Excellence Network (PEN) members to reinvigorate the leadership structure and its scope of work for the upcoming year. There now appears to be a full agenda of relevant activities and events sponsored by PEN. We look forward to hearing how PEN will continue to make strong contributions to the field and to AHRD.

Of special note is the establishment of the Mentoring Initiative through the leadership of Holly Hutchins and Rajashi Ghosh. Currently, there are 15 participants in the first cohort. The second cohort is now forming and already has six participants signed up. Having an active mentoring initia-

tive is critical for ensuring the reliable sharing of information across generations of faculty.

### **AHRD Awards**

A highlight of the 2016 Conference in the Americas is the opportunity for members to celebrate and applaud excellence in HRD research during the Awards ceremony. All members of each Award committee devoted a great deal of time and energy to reading and selecting papers, books, and dissertations to arrive at the eventual winner of each award. With the help of the Main Office staff, we have streamlined the approach to the Awards. All Award nominations, apart from the journal 'best paper' awards, are now submitted to the AHRD website, rather than via email.

### **Special Board Initiatives**

In 2015, the Board approved and engaged in several special initiatives. Based on the global policy statement that was approved in 2014, the Board approved the expenditure of unbudgeted funds to join the International Federation of Training and Development Organizations (IFTDO). Ron Jacobs and Carol Panza, from IFTDO, authored a Perspectives manuscript for HRDI to explain the promise of AHRD joining as a member of IFTDO. One of the major benefits is that AHRD members now have access to the IFTDO members-only section of their website, including their IFTDO Newsletter. The overall intent of the global policy is to increase the reach of AHRD into global locations that have not had much contact with us until now, but have active or emerging HRD scholarly communities.

The second major initiative is the Research to Practice initiative that seeks to place summaries of relevant journal articles from AHRD journals in the hands of HRD practitioners. In 2015, the Board entered into an agreement with ATD to provide blog descriptions of research articles taken from one of our journals that now appear in the ATD Science of Learning web link. Again, special recognition for this achievement goes to Catherine Lombardozi, Darren Short, and Carol Packard, among several others in the Scholar-Practitioner SIG. I urge everyone to check out this

information in the ATD website – it does not require a membership to access this information.

There are additional initiatives of the Board, including the planning of an HRD research with IFTDO in East Africa and the consideration of a journal on adult learning and technology in the workplace. We look forward to 2016 as the breakthrough year for the realization of these and other initiatives.

## Final Reflections

The work of this year’s Board provided further evidence that AHRD is made up of committed volunteers who are willing to dedicate many hours of their personal time, based

on a belief in and commitment to the AHRD mission. AHRD certainly benefits from their contributions, and from all its volunteers as well. AHRD is not a large organization in terms of the size of its membership, but no one can deny our energy, influence, and impact.

With this statement, I wish to close the 2016 President’s Message to members. Thank you again for your commitment to AHRD and have a great 2016 conference.

*Ron Jacobs*

P.S. I look forward to seeing all of you next year in San Antonio!

Table 1

## MEMBERSHIP 2004-2016

Date	Regular Membership	Student Membership	Regular - HDI Membership	Total Membership
March, 2004	330	218	18	566
March, 2005	359	343	16	718
March, 2006	376	222	27	625
March, 2007	446	224	29	699
March, 2008	376	216	15	607
February, 2009	432	253	27	712
March, 2010	434	234	55	723
February, 2011	439	173	63	678 (3 SIG)
February, 2012	402	174	11	591 (4 SIG)
January, 2013	373	200	12	587 (2 SIGs)
January, 2014	339	187	13	542 (3 SIGs)
January, 2015	323	173	9	509 (3 SIGs, 1 Emeritus)
January, 2016	320	189	15	530 (3 SIGs, 3 Emeritus)

Table 2

**END OF YEAR FINANCIAL SUMMARY**

	<b>FY 2004-2005</b>	<b>FY 2005-2006</b>	<b>FY 2006-2007</b>	<b>FY 2007-2008</b>	<b>FY 2008-2009</b>
<b>INCOME</b>					
Conference Fees	\$94,787.39	\$90,450.36	\$108,022.17	\$82,583.49	\$114,020.00
Membership Dues	\$85,700.00	\$85,360.00	\$103,286.00	\$140,030.00	\$122,550.00
Dividend & Interest	\$0.00	\$1,008.29	\$527.33	\$913.75	\$878.32
Other	\$0.00	\$3,117.28	\$12,332.92	\$10,182.06	\$1,147.46
Royalties	\$0.00	\$0.00	\$0.00	\$0.00	\$1,709.87
<b>TOTAL INCOME</b>	<b>\$180,487.39</b>	<b>\$179,935.93</b>	<b>\$224,168.42</b>	<b>\$233,709.30</b>	<b>\$240,305.65</b>
<b>EXPENSES</b>					
Credit Transaction Fees	\$0.00	\$3,053.67	\$4,128.89	\$6,479.59	\$7,613.43
Committee Expenses	\$0.00	\$1,830.17	\$0.00	\$0.00	\$0.00
Awards	\$2,320.98	\$2,590.41	\$1,946.84	\$2,342.88	\$2,498.49
Board Meetings	\$9,972.83	\$17,659.71	\$10,452.94	\$14,963.56	\$9,981.70
Management (Personnel)	\$41,147.07	\$39,676.97	\$38,660.85	\$42,800.56	\$47,694.93
Office Expenses	\$3,985.63	\$3,604.13	\$2,994.45	\$8,949.08	\$13,349.00
Publications (AHRD Journals)	\$42,809.50	\$43,081.77	\$50,462.44	\$63,571.19	\$52,943.83
Professional Fees (accountant, Insurance, Web Hosting)	\$9,178.25	\$1,596.80	\$3,596.73	\$4,959.50	\$14,029.00
Research Grants	\$0.00	\$0.00	\$10,000.00	\$0.00	\$0.00
Travel (Other)	\$1,564.30	\$1,724.77	\$3,666.89	\$2,431.94	\$1,461.02
Other		\$2,057.61	\$4,196.11	\$3,655.00	\$7,427.13
Conference	\$48,867.78	\$50,598.98	\$66,828.60	\$74,141.20	\$69,102.52
<b>TOTAL EXPENSES</b>	<b>\$159,846.34</b>	<b>\$179,214.93</b>	<b>\$196,934.74</b>	<b>\$224,294.50</b>	<b>\$226,184.99</b>
<b>INCOME MINUS EXPENSES</b>	<b>\$20,641.05</b>	<b>\$721.00</b>	<b>\$27,233.68</b>	<b>\$9,414.80</b>	<b>\$14,120.66</b>
<b>ASSETS &amp; LIABILITIES</b>					
<b>TOTAL ASSETS</b>	<b>\$130,713.67</b>	<b>\$131,435.02</b>	<b>\$158,193.60</b>	<b>\$167,608.40</b>	<b>\$182,244.06</b>
<b>ACCOUNTS PAYABLE</b>					
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$130,713.67</b>	<b>\$131,435.02</b>	<b>\$158,193.60</b>	<b>\$167,608.40</b>	<b>\$182,224.06</b>
<b>Conference Profit</b>	<b>\$45,919.61</b>	<b>\$39,851.38</b>	<b>\$41,193.57</b>	<b>\$8,442.29</b>	<b>\$44,917.48</b>

	FY 2009-2010	FY 2010-2011	FY 2011-2012	FY 2012-2013	FY 2013-2014	FY 2014-2015
<b>INCOME</b>						
Conference Fees	\$89,960.00	\$119,155.99	\$126,966.00	\$136,318	\$157,745.00	\$124,222.51
Membership Dues	\$109,810.00	\$104,934.99	\$101,066.00	\$97,850	\$88,094.00	\$83,580.00
Dividend & Interest	\$2.79	\$0.00	\$0.00	\$0.00	\$0.03	\$804.28
Other	\$2939.58	\$475.00	\$1,825.00	\$3,142	\$3,525.40	\$7997.00
Royalties	\$22,445.59	\$13,804.09	\$24,599.00	\$20,531	\$21,839.70	\$21,871.85
<b>TOTAL INCOME</b>	\$225,157.96	\$238,370.07	\$254,456.00	\$257,841	\$271,204.13	\$238,475.64
<b>EXPENSES</b>						
Credit Transaction Fees	\$7,699.96	\$7,349.65	\$7,300.00	\$7,515.00	\$8640.69	\$8110.27
Committee Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Awards	\$3,783.12	\$1,277.34	\$889.00	\$1,100.00	\$2115.76	\$2186.30
Board Meetings	\$7,623.35	\$7,016.84	\$719.00	\$5,765.00	\$7837.82	\$8385.58
Management (Personnel)	\$78,000.00	\$82,604.96	\$82,385.00	\$82,000.00	\$84,459.96	\$86,150.04
Office Expenses	\$5,204.08	\$5,815.87	\$2,003.00	\$2,134.00	\$3604.91	\$736.11
Publications (AHRD Journals)	\$70,472.15	\$50,421.92	\$44,895.00	\$34,766.00	\$39,783.32	\$28,349.80
Professional Fees (accountant, Insurance, Web Hosting)	\$5,490.40	\$14,096.25	\$5,043.00	\$7,433.00	\$9702.06	\$8079.21
Research Grants	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel (Other)	\$5,911.06	\$0.00	\$0.00	\$0.00	\$1546.29	\$2241.00
Other	\$5415.00	\$430.00	\$1,860.00	\$1,647.00	\$1302.90	\$0.00
Conference	\$57,424.04	\$89,369.01	\$81,723.00	\$79,711.00	\$77,899.22	\$99,228.30
<b>TOTAL EXPENSES</b>	\$247,023.16	\$258,381.84	\$226,816.00	\$222,071.00	\$236,892.93	\$243,466.61
<b>INCOME MINUS EXPENSES</b>	-\$21,865.20	-\$20,011.77	\$27,640.00	\$35,770.00	\$34,311.20	-\$4990.97
<b>ASSETS &amp; LIABILITIES</b>						
<b>TOTAL ASSETS</b>	\$172,896.77	\$140,486.78	\$171,508.00	\$208,131.00	\$242,625.27	\$262,326.15
<b>ACCOUNTS PAYABLE</b>	\$12,517.91	\$119.69	\$3,501.00	\$4,352.00	\$2973.95	\$23,030.01
<b>TOTAL LIABILITIES &amp; EQUITY</b>	\$172,896.77	\$140,486.78	\$171,508.00	\$208,131.00	\$242,625.27	\$262,326.15
<b>Conference Profit</b>	\$32,535.96	\$30,123.50	\$45,243.00	\$56,606.00	\$79,602.39	\$24,994.21