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STATUS AND PROFESSIONAL ASSOCIATION COUNCILS

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## CHAPTER TEN

### STATUS DRIVE AND ASSOCIATION ACTIVITY TO INCREASE STATUS

#### 10.1 INTRODUCTION

Status has been established (Chapter Nine) as a common concern of association Councils. This chapter presents the findings of the study in respect of those hypotheses concerned with association status drive and association activity to increase status, namely hypotheses (xiii), (xiv), (xv), (ix), (xvii), (xxxii) and (xxxiv). The findings are presented in Sections 10.2-10.8 as follows:

- Hypothesis (xiii) concerning Drive for Standing, Recognition, Identity and Self-respect - Section 10.2
- Hypothesis (xiv) concerning State Recognition - Section 10.3
- Hypothesis (xv) concerning New Activities - Section 10.4
- Hypothesis (ix) concerning Search for Status as Motivator - Section 10.5
- Hypothesis (xvii) concerning Activity and Status Gaps - Section 10.6
- Hypothesis (xxxii) concerning Opportunism - Section 10.7
- Hypothesis (xxxiv) concerning Promotional Activity - Section 10.8

For ease of reference to the findings relating to each hypothesis, each Section 10.2-10.8 begins on a new page. Section 10.9 summarises the conclusions of the findings in respect of this group of hypotheses.

In order that the documentary evidence upon which the findings are based does not interrupt the flow of presentation, this evidence is summarised in this chapter and a selection of the evidence is presented in the related appendices as follows:

- Hypothesis (xiii) concerning Drive for Standing, Recognition, Identity and Self-respect (Section 10.2) - Appendix XXII
- Hypothesis (xiv) concerning State Recognition (Section 10.3) - Appendix XXIII
- Hypothesis (xv) concerning New Activities (Section 10.4) - Appendix XXIV



- Hypothesis (ix) concerning Search for Status as Motivator (Section 10.5) - Appendix XXV
- Hypothesis (xvii) concerning Activity and Status Gaps (Section 10.6) - Appendix XXVI
- Hypothesis (xxxii) concerning Opportunism (Section 10.7) - Appendix XXVII
- Hypothesis (xxxiv) concerning Promotional Activity (Section 10.8) - Appendix XVIII

### Introduction

The hypothesis was tested by quantitative methods. The examination of relationships between variables of relevance to the testing of the hypothesis is presented in Appendix XXII.

Findings consistent with the hypothesis were found in standing, recognition, identity and self-respect. Councils of status seeking associations including members of Councils of status maintaining associations.

During the process of standing, recognition, identity and self-respect in terms of standing, recognition, identity and self-respect. The assessment of 'drive' in terms of standing, recognition, identity and self-respect, persistence, intensity, and...

The hypothesis was tested by quantitative methods (see Table 3.7 in Chapter 3) by participant observation. The approach was adopted in order to be assessed in terms of standing, recognition, identity and self-respect (see Table 3.7 in Chapter 3). The 'indicator' in respect of each of these variables was the burden of 'record keeping' or 'reporting' which would have inhibited the process of standing, recognition, identity and self-respect. For a more balanced assessment to be made...



## 10.2 DRIVE FOR STANDING, RECOGNITION, IDENTITY AND SELF-RESPECT

(xiii)

The drive for standing, recognition, identity and self-respect is stronger among members of Councils that perceive their associations as relatively low in status.

### Introduction

The hypothesis was tested by questionnaire, interview and participant observation. The examination of minutes and publications also revealed evidence of relevance to the testing of the hypothesis. A selection of this is presented in Appendix XXII.

Evidence consistent with the hypothesis would be of more drive for standing, recognition, identity and self-respect among members of Councils of status seeking associations and less such drive among members of Councils of status maintaining associations (Table 3.2).

During the process of participant observation an attempt was made to assess 'drive' in terms of both activities relating to, and the perceived importance of, standing, recognition, identity and self-respect, and also the degree of intensity or tenacity with which such activities were pursued. The assessment of 'drive' in terms of degrees of such factors as commitment, persistence, intensity and tenacity was largely qualitative.

In the case of the hypotheses considered in this chapter which were assessed (in part) by participant observation, a qualitative rather than a quantitative approach was adopted. In total, participant observation contributed to the assessment of no fewer than twenty-two hypotheses (see Table 3.7 in Chapter Three). Employing just one numerical 'indicator' in respect of each of these hypotheses would have imposed a burden of 'record keeping' or 'counting' during Council meetings that would have inhibited the process of participant observation necessary for a more balanced assessment to be made.

## BGA / BBGS

The Questionnaire evidence is not supportive of the hypothesis. The responses to the Questionnaire questions on the 'importance of relevant activities' (Q18 and Q20) and summarised in Summary Table 10.1-3 and Table 10.1 in appendix XXXI did not support the hypothesis. The question of recognition and the achievement of greater status and standing was ranked higher in importance by BGA respondents.

The responses to the question on the 'degree of status and recognition achieved' (Q25) summarised in summary Table 10.4-6 and Table 10.4 in Appendix XXXI do not support the hypothesis. A substantially higher proportion of BGA respondents felt that the degree of status and recognition achieved was unsatisfactory, not sufficient, falling and below that of other professions. Overall, the evidence on the 'importance of various forms of recognition' (Q30) presented in Summary Table 10.7-9 and Table 10.7 in Appendix XXXI does not support the hypothesis. BGA respondents compared with BBGS respondents put less importance upon the question of a Royal Charter, recognition by other professional bodies and Council satisfaction, but greater importance upon academic recognition, recognition by employers, public bodies and members and personal satisfaction.

BGA and BBGS interviewees linked their personal standing, recognition, identity and self-respect to their performance as managers, and to their career progression, to a greater extent than 'accounting' and 'management' association interviewees. Typical responses were "performance and salary are what count", "what you do shows what you have learned", "you have to prove the worth of your MBA - it's not like becoming a lawyer and accountant, when once you qualify, you are accepted as OK!".



**SUMMARY TABLE 10.1-3****Importance Given by Individual Questionnaire Respondents to Status, Standing and Recognition**

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
<b><u>Views on Professional Issues (Q18)</u></b>						
Recognition of the Profession	4.0	3.3	3.9	3.8	4.5	3.9
<b><u>Importance of Professional Association Activities (Q20)</u></b>						
Enhancement of Professional Status	3.9	4.2	3.5	4.0	4.5	4.0
Achievement of Professional Recognition	3.5	3.7	3.8	4.5	5.0	3.8
Securing Official Recognition	3.1	2.7	3.9	4.5	5.0	3.5
Maintenance of Existing Status and Standing	4.0	3.2	3.9	4.2	5.0	3.8
Achievement of Greater Status and Standing	4.1	3.2	3.7	4.3	5.0	4.1
Search for Public/Statutory Recognition	3.4	2.7	3.2	4.2	5.0	3.6
Recognition as the Voice of the Profession	3.4	3.5	3.9	4.2	5.0	4.2
Overall Average	3.7	3.3	3.7	4.2	4.9	3.9

**SUMMARY TABLE 10.4-6****Views of Individual Questionnaire Respondents on the Degree of Status and Recognition Achieved by Their Professional Associations (Q25)****Percentage of Those Responding to Each Question:**

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
Satisfactory	22	100	86	20	100	47
Unsatisfactory	78	-	14	80	-	53
Sufficient	12.5	100	61	25	100	6
Not Sufficient	87.5	-	39	75	-	94
Rising	33	100	87.5	-	100	88
Falling	50	-	12.5	100	-	16
Static - Low	17	-	-	-	-	6
Realistic	83	100	94	25	100	85
Not Realistic	17	-	6	75	-	15
Deserved	83	100	89	75	100	93
Undeserved	17	-	11	25	-	7

**Relative to other bodies in the profession:**

Above	16	50	53	-	50	13
Equal to	17	-	35	20	50	40
Below	67	50	12	80	-	47



**SUMMARY TABLE 10.7-9****Importance Placed by Individual Questionnaire Respondents on Various Forms of Recognition (Q30)**

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
Statutory Recognition	2.1	2.5	3.5	4.3	4.5	3.2
Royal Charter	1.5	2.5	3.0	3.8	5.0	3.4
Academic Recognition	3.4	3.2	3.6	4.0	4.0	4.1
Recognition by Employers	4.2	3.7	4.1	4.7	5.0	4.6
Recognition by Public Bodies	3.9	3.7	4.0	4.7	5.0	4.3
Recognition by Other Professional Bodies	3.3	4.2	3.5	4.5	4.0	4.0
Recognition by Members of Other Professional Bodies	3.1	3.5	3.4	4.5	4.5	4.1
Recognition by Members	4.1	4.5	4.5	4.8	5.0	4.6
Whether your Council is Satisfied	3.5	3.5	3.6	4.0	5.0	4.1
Your Own Personal Satisfaction	3.6	3.0	3.5	4.2	4.5	4.0
Overall Average	3.3	3.5	3.7	4.3	4.6	4.0

Overall, the 'participant observation' category of evidence does not support the hypothesis. The BGA Committee, compared with the BBGS Committee, appeared more concerned with questions of standing, recognition, identity and self-respect and exhibited greater drive in initiating relevant activities. The BGA was particularly quick to discuss and respond to public criticism of MBAs.

An examination of BGA publications reveals a continuing concern with the standing, recognition, identity and self-respect of the BGA and of MBAs (see Appendix XXII). The publications category of evidence did not reveal a stronger drive on the part of the BBGS.

The BGA believed it had played an important role in establishing and promoting recognition of post-graduate management education in Britain. Its concern with raising its profile as an association was in large part in order to allow it to continue and to more effectively promote, and secure understanding and acceptance of, the value of post-graduate management education.

The BBGS, in comparison with this commitment on the part of the BGA to a 'cause', had little in the way of an organised programme to drive for status, standing and recognition. Its activities tended to be ad hoc and unrelated. While the BGA sought to keep the quality of its members high, and was reluctant to secure extra members by significantly widening the number of business schools the qualifications of which established eligibility for membership, such drive as the BBGS did exhibit tended to relate to 'getting more members'.

### ICA / SCCA

In the case of the accounting associations, the Questionnaire evidence supports the hypothesis. The evidence on the 'importance of relevant activities (Q18 and Q20), for example, set out in Summary Table 10.1-3 and Table 10.2 in Appendix XXXI, supports the hypothesis. In particular, SCCA respondents placed a higher importance upon the achievement of professional recognition, securing official recognition, the achievement of greater status and the search for public/statutory recognition.



The responses to the question on the 'degree of status and recognition achieved' (Q25) summarised in summary Table 10.4-6 and Table 10.5 in appendix XXXI support the hypothesis. LSCA respondents largely believed the degree of status and recognition achieved by the ICA to be satisfactory, rising, realistic and deserved, but seven respondents still believed it to be not sufficient, compared with eleven who believed it was sufficient. SCCA respondents in contrast felt the degree of status and recognition achieved by the SCCA to be unsatisfactory, not sufficient, falling and not realistic. No SCCA respondents ranked the SCCA above other bodies in the profession, with four respondents ranking it below and one equal to other bodies.

The evidence on the 'importance of various forms of recognition' (Q30) set out in summary Table 10.7-9 and Table 10.8 in Appendix XXXI also supports the hypothesis. SCCA respondents place a higher importance upon statutory and Royal Charter recognition, academic recognition, recognition by employers, public bodies, other professional bodies, members of other professional bodies and members and personal satisfaction. A third of total LSCA respondents expressed the view that a Royal Charter was not important.

In interview situations, ICA interviewees tended to deny any drive for standing, recognition and self-respect. ICA interviewee responses included: "what drive, there's not much professionally I can do beyond being an accountant so far as qualifications are concerned", "drive is not the right word - I look for satisfaction, but I don't see myself as having a 'drive', at least not for status", "our standing reflects what we are and what we do - I aim to do a good job, I don't drive for standing as something separate from this!" All SCCA interviewees acknowledged such a drive, but tended to ascribe the drive to members of their association (and of their association Council) as a group rather than to themselves personally (eg "we are all looking for a place in the sun!").

The participant observation evidence strongly supports the hypothesis. The SCCA emerges as very much a status and recognition seeking organisation, while the LSCA was to a much greater degree concerned with the maintenance of a leading position in terms of standing and recognition in the face of various internal and external challenges.

While the 'publications' category of evidence confirmed the extent of ICA activity to safeguard and maintain status, it also reflected the relatively stronger drive of the SCCA to enhance status (see Appendix XXII).

The ICA, in comparison with the SCCA, had a much more significant public reputation to be concerned with. The concern it expressed related to the maintenance of a perceived level of achieved standing as the 'leading' and 'premier' accounting body. It did not, in the main, appear as a 'drive' to materially increase standing and recognition. External survey evidence, media coverage and the predominant role played by the ICA within the CCAB appeared to confirm the ICA as the most prestigious association within the accounting profession.

In total the documentary evidence confirmed the position of the ICA as the most prestigious accountancy association. Nevertheless the ICA emerges as articulating a desire to raise its standing, status and influence to a still higher level.

Overall, the published evidence confirmed the significantly (compared with the ICA) inferior status and standing of the SCCA. The SCCA Council exhibited greater concern than its ICA counterpart with raising the image and standing of the association. Its efforts were not entirely successful, an initial approach to the CCAB, for example, being met with a rebuff.

While the drive of the SCCA to enhance its status, recognition and identity was undoubtedly stronger than that of the ICA, this should not be taken as evidence of a more organised and systematic programme. The 'drive' was not so much evidenced by programmed activity as by expressions of desire.

The evidence in relation to the issue of 'identity' and 'self-identity' is also consistent with the view that the SCCA is a less prestigious association than the ICA. The SCCA members, tended to respond to the issue of 'identity' and 'self-identity' to a lesser extent, ICA members, tended to respond to the issue of 'identity' and 'self-identity' to a greater extent. The evidence in relation to the issue of 'identity' and 'self-identity' is also consistent with the view that the SCCA is a less prestigious association than the ICA. The SCCA members, tended to respond to the issue of 'identity' and 'self-identity' to a lesser extent, ICA members, tended to respond to the issue of 'identity' and 'self-identity' to a greater extent.



IoD, BIM and ICSA / IM, CAM and IPR

The Questionnaire evidence, in the form of responses to the questions on the 'importance of relevant activities' (Q18 and Q20), set out in Summary Table 10.1-3 and Table 10.3 in Appendix XXXI, was not sufficient to support or refute the hypothesis, but did reveal a similar and high concern with issues of status and recognition.

The evidence on the 'degree of status and recognition achieved' (Q25), set out in Summary Table 10.4-6 and Table 10.6 in Appendix XXXI, revealed that a majority of IPR respondents (by 8 to 7) felt the status and recognition achieved by the IPR was unsatisfactory and, while a large majority felt its status and recognition was both deserved and rising, all but one respondent expressed the view that it was not sufficient. While the evidence was not sufficient to support or refute the hypothesis, it did offer prima facie support.

The evidence on the 'importance of various forms of recognition' (Q30), set out in Summary Table 10.7-9 and Table 10.9 in Appendix XXXI, was also not sufficient to support or refute the hypothesis. It does, however, reveal a relatively high level of importance placed by respondents from both bodies with various forms of recognition.

In interview discussions, it emerged that the 'question' at issue was more complex than is suggested by the way in which it was posed. It was clear that many 'management' association interviewees put varying degrees of importance upon the four elements 'standing', 'recognition', 'identity' and 'self-respect', consciously separated these elements and tended to address their response to just one or two of them. IoD, BIM and IM members tended to focus upon 'standing'. BIM members, additionally, and also CAM members, tended to respond to the issue of 'self-respect'. ICSA interviewees, and to a lesser extent, IPR interviewees, tended to react to the issue of 'identity', and suggested in their responses that their association memberships, represented an important element of their 'self-identity'. A drive for status enhancement was most in evidence in relation to the issue of 'recognition', particularly in the case of IM, CAM and IPR interviewees.

The participant observation evidence revealed a high degree of concern on the part of both ICSA and IPR members (compared with other associations in this group), with issues relating to standing, recognition, identity and self-respect and, compared with ICSA, a higher IPR concern with raising and enhancing status and recognition.

The publications evidence (see Appendix XXII) is mixed in that, at a particular moment, both status maintaining and status seeking associations can usually be found to be exhibiting a relatively strong drive for standing, recognition, identity and self-respect. That of the IPR emerges as particularly strong towards the end of the period of study.

Media evidence confirmed that the IoD had achieved a relatively high level of public recognition compared with the other management associations. Its prestige events tended to confirm its standing with promotional activity seemingly geared to spreading or widening awareness of the standing already achieved by the IoD rather than increasing it per se. In the case of the BIM, a similar desire for greater or wider awareness appeared as less of a 'drive' in the sense of this association exhibiting less urgency and commitment than the IoD in its achievement.

ICSA displays a consistent concern to extend its recognition. Underlying its promotional activity appears a 'marketing' concern with increasing membership. Academic and media evidence confirmed the relatively high standing already achieved by ICSA. As was the case with the IoD, there was some evidence that the 'drive' of ICSA related to securing further specific forms of recognition of the standing it had already achieved.

Evidence relating to CAM suggests this association still lacked authoritative recognition as a desirable (let alone necessary) qualification in its field. Thus particular additional forms of recognition achieved appear to be interpreted and presented in terms of raising the overall standing and recognition of CAM. Of all the management association governing organs, the IPR Council spent the most time discussing and debating the issue of status, standing and recognition. As a consensus emerged in the period 1984-86 in favour of action to increase standing, recognition, identity and self-respect, the most comprehensive and most fully articulated 'drive' of any association emerged.

### Summary

The evidence in respect of the BGA and BBGS does not support the hypothesis. In the case, however, of the 'accounting associations' (ICA/SCCA), the evidence supports the hypothesis. So far as the 'management associations' (IoD, BIM and ICSA/IM, CAM and IPR) are concerned, the hypothesis is not supported or rejected.

### Conclusion

The hypothesis is not supported for the associations made up of business graduates but, in the case of the accountancy associations studied, the evidence is consistent with it.

Across the full range of associations studied, there is some evidence that 'established' associations that have been categorised as 'status maintaining' seek what could be termed 'confirmatory recognition'. Such 'confirmatory recognition' does not significantly increase overall status and standing, but confirms that with further groups, and in additional (perhaps new) situations, the overall standing already achieved by an association is recognised. The hypothesis, as formulated, does not distinguish between drive for 'confirmatory' or incremental recognition, and significantly increased recognition.



In the case of the ICA, it is possible that standing, recognition, identity and self-respect had been largely achieved and hence 'drive' for them was not required or perceived as relevant.

Summary Table 10.1-3 presents the responses of members of the Councils of six associations to a series of questions (from Q18 and Q20) in the individual questionnaire (Appendix VII) concerning various forms of recognition. The 'overall average' for each association in Summary Table 10.1-3 represents a crude single measure indicator of the 'drive' (in the sense of the importance of further recognition) for further forms of recognition. Using this indicator, the following continuum (see Table 3.2) of association Councils from the association putting the most importance, to the association placing the least importance, upon further recognition is obtained: ICSA, SCCA, IPR, BGA/LSCA, BBGS. It is not clear, on the basis of this single measure, that the position of these associations in the continuum is consistent with their categorisation as 'business graduate', 'accounting', or 'management' associations, or by status as 'status seeking' or 'status maintaining' associations.

### 10.3 STATE RECOGNITION

- (xiv) The achievement of some form of state recognition or additional form of state recognition is a higher priority objective of Councils that perceive their associations as relatively low in status.

#### Introduction

The hypothesis was tested by minutes, publications and questionnaire. Selected documentary evidence relating to the hypothesis is presented in Appendix XXIII. Evidence consistent with the hypothesis would be of Councils of status seeking associations placing a high priority upon the achievement of state recognition while such an objective was not relevant for status maintaining associations that had already achieved such recognition (Table 3.2).

In the absence of formal and prioritised 'lists' of association objectives, the author attempted to assess the relative priority placed by Councils upon the question of incremental recognition in the context of overall association objectives. To test relative 'priority' as between different association objectives the volume of activity relevant to the hypothesis was interpreted in terms of its proportion of total activity and the degree of importance attached to it.

#### BGA / BBGS

The Questionnaire evidence on the 'importance of relevant activities' (Q20), 'achievement and/or maintenance of royal charter status' (Q23), 'challenges to professional association' (Q24) and 'importance of forms of recognition' (Q30), set out in Summary Tables 10.10-12 and 10.13-15 and Tables 10.10 and 10.13 in Appendix XXXI, does not support the hypothesis. For both associations, recognition by public bodies is more important than statutory recognition and the achievement of a Royal Charter (Q30). While the achievement of a Royal Charter was felt to be desirable by a clear majority of both BGA and BBGS respondents, it was equally clear that both sets of respondents felt this was not realistic or important and was a low priority (Q23).

SUMMARY TABLE 10.10-13Views of Individual Questionnaire Respondents on the Achievement and/or Maintenance of Royal Charter Status (Q23)Percentage of Those Responding to Each Question:

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
Desirable	67	75	83	67	100	100
Not Desirable	33	25	17	33	-	-
Realistic	33	25	82	20	100	81
Not Realistic	67	75	18	80	-	19
Important	29	-	62	60	100	69
Not Important	71	100	38	40	-	31
High Priority	25	-	67	40	100	50
Low Priority	75	100	33	60	-	50



**SUMMARY TABLE 10.13-15****Importance Placed by Individual Questionnaire Respondents on State Recognition, Relevant Activities and Related Challenges**

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
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**Importance of Forms of Recognition (Q30)**

Statutory Recognition	2.1	2.5	3.5	4.3	4.5	3.2
Royal Charter	1.5	2.5	3.2	3.8	5.0	3.4
Recognition by Public Bodies	3.9	3.7	3.9	4.7	5.0	4.3

**Importance of Relevant Activities (Q20)**

Securing Official Recognition	3.1	2.7	3.9	4.5	5.0	3.7
Search for Public/Statutory Recognition	3.4	2.7	3.2	4.2	5.0	3.6
Achievement of a Royal Charter	2.1	2.2	2.1	3.8	3.5	3.2

**Challenges to Professional Association (Q24)**

Official Recognition	3.1	2.0	2.3	4.5	5.0	3.6
Lack of Some Form of Official Recognition	3.4	2.0	1.9	4.2	5.0	3.2

The 'minutes and publications' category of evidence did not provide prima facie support for the hypothesis. The BGA, in 1983, briefly considered the desirability of a Royal Charter. Otherwise its relationship with the state was concerned with its 'representational' role or 'advocacy' role of promoting understanding and acceptance of post-graduate management education rather than recognition of the association per se. The BGA did not itself award a 'qualification' that could be 'recognised' by the state.

State recognition of a qualification was also not relevant for the BBGS. The only significant concern of the BBGS with state recognition related to a one time desire to be absorbed by a BIM that itself sought Royal Charter status.

### ICA / SCCA

The Questionnaire evidence on the 'importance of relevant activities' (Q20) presented in Summary Table 10.13-15 and Table 10.14 in Appendix XXXI supports the hypothesis. While five out of six SCCA respondents felt 'securing official recognition' and four out of six felt 'search for public/statutory recognition' to be 'extremely important' the comparative responses from LSCA respondents in the 'extremely important' category were under a third and less than a seventh respectively. 'Achievement of a Royal Charter' is likely to have been regarded as of little importance to LSCA respondents in view of the fact that the ICA is in possession of a Royal Charter.

The evidence in respect to 'achievement and/or maintenance of Royal Charter status' (Q23), set out in Summary Table 10.10-12 and Table 10.11 in Appendix XXXI, does not support the hypothesis. The responses suggest that LSCA Committee members place a very high importance upon the maintenance of Royal Charter status.

The evidence in the form of responses to the questions on 'challenges to professional association' (Q24) and the 'importance of forms of recognition' (Q30) (see Summary Table 10.13-15 and Table 10.14 in Appendix XXXI) supports the hypothesis. The patterns of LSCA responses to Question 30 suggests there are two schools of thought on the question of the importance of statutory recognition and the Royal Charter of the ICA.

The minutes and publications evidence (see Appendix XXIII), while it revealed some jealousy on the part of the ICA in respect of the state-recognition it had achieved vis-a-vis other bodies, and satisfaction in respect of such incremental moves as the establishment of the Government Accountancy Service, provided considerable support for the hypothesis. The priority placed by the SCCA upon the achievement of state-recognition on occasions overrode all other issues and was perceived as the key determinant of the future continued existence of the society.

The ICA is in possession of a Royal Charter and statutory recognition, and is a member of the CCAB. One could argue that as an association, it was not possible for the ICA to secure an 'additional form of state recognition'. The ICA did seek to further the recognition of the professional accountant within the government service and, conscious of the recognition it had achieved, exhibited some sensitivity to the views of the government and public on such issues as professional advertising, and the use by other associations of the word 'chartered' in their names.

The SCCA does not have a Royal Charter or statutory recognition, and is not a member of the CCAB. The SCCA appeared to doubt its ability to secure any of these forms of recognition. While engaging in Parliamentary representation designed to secure recognition of a role for the SCCA vis-a-vis the smaller company, the SCCA decided in 1984 against formal application for CCAB membership and statutory ('section 161') recognition under the Companies Acts. On grounds of practicality, SCCA day-to-day activity from 1984 became less concerned with state recognition, and more concerned with recognition of the value of the SCCA qualification by employers and educators.



IoD, BIM and ICSA / IM, CAM and IPR

While the Questionnaire evidence on the 'importance of relevant activities' (Q20), 'achievement and/or maintenance of royal charter status' (Q23), 'challenges to professional association' (Q24) 'and the 'importance of forms of recognition' (Q30) (see Summary Tables 10.10-12 and 10.13-15 and Tables 10.12 and 10.15 in Appendix XXXI) was not sufficient to support or refute the hypothesis, it was sufficient to throw some doubt upon it. Both the ICSA and the IPR respondents placed a relatively high degree of importance upon state recognition issues in comparison with other associations grouped with them.

The minutes and publications evidence (see Appendix XXIII) was significantly more supportive of the hypothesis in that during the period of the study the IM applied for a Royal Charter, and at one time or another such an application was considered by both CAM and the IPR as a longer term objective.

The IoD and ICSA already have Royal Charters (while the BIM has kept the question of Royal Charter status under review). The IoD, BIM and ICSA all appeared to view state recognition in terms of continuing to be invited to make representations and give comments on issues of concern to their members. 'Working' or 'operational' recognition was a practical matter of whether or not the association concerned was consulted. Periodic contact with ministers and parliamentary activity was thought to be a useful complement to, and supportive of, a day-to-day working relationship with civil servants. Documentary evidence suggested the IoD, BIM and ICSA were broadly satisfied with the 'representational recognition' they had achieved.

ICSA did appear delighted with the 'statutory' recognition it achieved in section 79 of the 1980 Companies Act. Like the ICA, ICSA also undertook activity to enhance recognition of its qualification in the context of the government service.

As an educational body CAM's priority focus appeared to be on employer and educational recognition rather than state recognition of its qualification. In contrast, the IM and IPR were more concerned with securing 'representational recognition', which, unlike the IoD, BIM and ICOSA, they could not take for granted. CAM engaged in little or no representational activity per se.

### Summary

The evidence in respect of the BGA and BBGS does not support the hypothesis. The evidence for the accounting associations (ICA/SCCA), however, supports the hypothesis, while, taken as a whole, prima facie, the evidence also supports the hypothesis in the case of the 'management associations' (IoD, BIM and ICOSA/IM, CAM and IPR).

### Conclusion

The hypothesis is not supported in the case of the associations composed of business graduates but is, prima facie, supported in the case of the other associations studied. The placing of a significantly higher priority upon some form or some additional form of state recognition can occur at a particular time in the case of a status seeking association. Status seeking categorisation may be a necessary condition but need not be a sufficient condition for such a relatively high degree of priority.

It should be noted that, to a greater extent than the other associations studied, the BGA drew a distinction between its own standing as an association and that of the 'MBA' degree. The BGA put a high priority upon recognition of the value of the 'MBA' as a qualification. Both the BGA and BBGS conferred membership on the basis of qualifications awarded by other institutions.

There was some feeling among interviewees from the management and business graduate associations that state recognition was becoming of less significance as an issue in that, independent of such recognition, professional associations were increasingly having to 'justify' themselves in terms of the relevance of the services they provided to the needs of their members.

Individual questionnaires (Appendix VII) were returned by Council Members of six associations. The individual questionnaire contained questions (within Q20 and Q30) relating to the importance of 'statutory recognition', 'Royal Charter', 'recognition by public bodies', 'securing official recognition', 'search for public/statutory recognition' and 'achievement of a Royal Charter'. The average importance given to these forms of 'state recognition' by respondents from each association is presented in Summary Table 10.13-15. The overall average of the responses to these six questions represents a summary measure of the importance attached by the respondents to 'state recognition'.

Using this 'state recognition' indicator, one could construct a continuum of the six association Councils from the association whose Council placed the highest importance upon state recognition, to the association Council putting the least importance upon such recognition: ICSA (4.7), SCCA (4.2), IPR (3.6), LSCA (3.3), BGA/BBGS (2.7). Apart from the relatively low importance placed upon 'state recognition' by the business graduate associations, position on the continuum would not appear to be related to categorisation as an 'accounting' or 'management' association or to categorisation by status as 'status seeking' or 'status maintaining'.



#### 10.4 NEW ACTIVITIES

- (xv) The contribution of significant new activities to questions of standing, recognition, authority and status is relatively more explicit and significant an element in the decision to proceed with them in the case of Councils that perceive their association to be relatively low in status.

##### Introduction

The hypothesis was tested by participant observation and interview. This section also draws upon relevant evidence uncovered during an examination of minutes and publications, a selection of which is presented in Appendix XXIV. Evidence consistent with the hypothesis would be of explicit consideration of the contribution of new activities to association standing, recognition, authority and status in the decisions of status seeking associations to proceed with them, while such consideration was not significant in respect of similar decisions of status maintaining associations regarding new activities (Table 3.2).

In the process of participant observation, an attempt was made to distinguish between activities that were 'incremental' and those which were 'new'. Activities of a kind that had not been undertaken before were clearly 'new'. In some cases activities of a kind that had been undertaken before were judged to be sufficiently different in scale or scope to be considered 'new'. Identification and assessment of which 'elements' were the most significant in decisions to proceed with new activities inevitably involved the subjective judgement of the participant observer.

##### BGA / BBGS

The participant observation and interview evidence was not consistent with the hypothesis. Interviewees from both the BGA and BBGS introduced questions of standing, recognition, authority and status into discussions concerning new activities. These questions were also raised in Committee discussions of both organisations.

A distinction did emerge between the standing, recognition, authority and status of the association and that of the business studies degree, possession of which was a requirement for membership of both the BGA and BBGS. In interview and Committee discussion situations, BBGS questions concerning standing, recognition, authority and status tended to relate to the BBGS itself as an association, while those of the BGA tended to relate more to public, and particularly corporate, perception of and acceptance of the MBA qualification. In the view of one BGA interviewee: "The real issue of standing and recognition concerns the MBA, not the BGA. We need to consider what we as an association can do by way of new activities to enhance the MBA as a qualification, or rather the MBA as an 'animal'".

The minutes and publications evidence also did not support the hypothesis. Questions of standing, recognition, authority and status were explicit and significant in the context of discussion of proposed new activities by the Committees of both the BGA and the BBGS. On occasion, the BGA Committee discussions regarding new activities involved significantly greater stress upon such questions than similar BBGS discussions regarding other and BBGS new activities.

### ICA / SCCA

The 'participant observation' and 'interview' categories of evidence strongly support the hypothesis. In the case of SCCA social events, questions of standing, recognition, authority and status appeared to be the primary justification for their continuance. In the case of the SCCA programme of City luncheons, initiated during the period of study, these questions were virtually its sole justification.

ICA interviewees tended to question the value and relevance of new activities. In the view of one interviewee: "What really can we do now that we have not already thought of that will have much impact on our standing. Isn't it a matter of getting existing things such as inflation accounting right, rather than doing new things?". Another interviewee expressed a caution: "We have to be careful that new activities don't divide us or harm the reputation we have already got."

In contrast, SCCA interviewees believed that new activities were needed to enhance the Society's standing, recognition, authority and status (eg, "We can't afford to do anything which doesn't help us raise our status and help us get recognition"). In the view of one SCCA interviewee: "We need new activities to lift our status all right. The question is what activities are going to work and give us the recognition we want?".

The LSCA, in contrast, appeared concerned, if concerned at all, about these same questions from the point of view of whether proposed new events and activities would be appropriate and in keeping with the standing, recognition, authority and status that had already been achieved by the LSCA/ICA. When specifically questioned, LSCA interviewees expressed disbelief that an individual new event or activity could do much to enhance a standing that had been built up over a relatively long period of time. It was recognised however that the 'wrong', an inappropriate or unsuccessful event or activity could harm or prejudice the standing that had been achieved.

The minutes and publications evidence provided some support for the hypothesis. 'New' activities for the ICA tended to be incremental additions to member services. For the SCCA, with less total activity under way, such new activities, as the introduction of a post-qualifying Diploma in European Studies, or the inauguration of an annual Founders' Lecture had a more significant impact upon the organisation.

#### IoD, BIM and ICOSA / IM, CAM and IPR

The 'participant observation' and 'interview' categories of evidence support the hypothesis. In the case of both the IM and the IPR, significant new activities were initiated during the period of the study to better position these associations to achieve Royal Charter status. In the period 1984-86, CAM re-examined many existing activities from the point of view of their contribution to its standing, recognition, authority and status when the precarious nature of its finances limited the number of new activities (other than self-financing activities) which could be undertaken to achieve the same purpose.

In interview and participant observation situations questions of standing, recognition, authority and status did arise in decisions to proceed with certain new activities undertaken by the IoD, BIM and ICSA. The questions were not raised so frequently, intensively or persistently as was the case with the IM, CAM and IPR. Other questions such as likely take up and relevance to member needs and interests assumed a higher importance for the IoD, BIM and ICSA, as compared with the IM, CAM and IPR in discussions and decisions concerning new activities.

One IoD interviewee expressed the view that: "New activities must reflect the standing of the Institute", while an ICSA interviewee pointed out: "As a chartered body, we have to make sure that anything new we do is really good". IM, CAM and IPR interviewees were the most concerned that new activities should lift or raise the standing, status and recognition of their associations. These interviewees rarely raised the issue of whether or not a new activity might harm an existing reputation.

The minutes and publications evidence revealed all the associations studied to be engaged in initiating new activities during the period of study (see Appendix XXIV). The link between new activity and the enhancement of status was particularly strong in the case of the IPR, while for status maintaining associations the purpose of new activities was generally to do with such concerns as improving services to members and to a lesser extent, than was the case with status seeking associations, with enhancing status.

IoD new activities appeared to be related to 'influence' and effectiveness rather than the enhancement of recognition or standing. The purpose of the formation of the IoD's European Association in 1980 was in part to increase the influence of the IoD in Europe. Similarly, the purpose of a new office in Cardiff was to increase the influence of the IoD in Wales. In comparison with the IoD, new BIM activities related rather more to managerial and administrative efficiency, while new ICSA activities appeared to be related rather more to the enhancement of member services. The enhancement of standing and recognition was more explicit in the case of new activities of the IM, CAM and IPR.



### Summary

The evidence in respect of the 'business graduate' associations (BGA/BBGS) does not support the hypothesis. In the case of the 'accounting' associations (ICA/SCCA) and the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR), however, the evidence supports the hypothesis.

Although not intended as a primary source of evidence, views on the importance of 'initiating new activities' as an association activity in the responses to question 20 (see Table 10.19) were consistent with the hypothesis in the case of the 'business graduate' (unlike the primary evidence) and accounting association matched pairs. A higher importance was placed upon this activity by BBGS (compared with BGA) and SCCA (compared with LSCA) respondents.

### Conclusion

The hypothesis is not supported in the case of the associations composed of business graduates but is supported in the case of the other associations studied. The special position of the 'business graduate' associations could reflect the fact that they conferred membership upon the basis of qualifications awarded by other institutions. These qualifications had a standing, recognition and status independent of the BGA and BBGS as associations.

Taking the group of associations studied as a whole, one can, on the basis of the interview and participant observation evidence, rank all these associations on a continuum according to the extent to which questions of standing, recognition, authority and status were explicit in decisions to proceed with new activities. Such a continuum (see Table 3.2) of Councils based upon the qualitative and subjective evaluation of the author, ranging from the association for which these considerations were most explicit, to the association for which they were of least significance, would be as follows: CAM, IPR, SCCA, BGA/BBGS, IM, BIM, IoD, ICSA, ICA.

Other than the case of the business graduate associations, position in the continuum would appear to be broadly consistent with the status categorisation of associations as 'status seeking' or 'status maintaining'.

## 10.5 SEARCH FOR STATUS AS MOTIVATOR

- (ix) The search for status is a stronger motivator of further steps along the process of professionalisation in the case of Councils that perceive their associations as relatively low in status.

### Introduction

The hypothesis was tested by questionnaire, participant observation and interview and, where appropriate, by published information found to be relevant. A selection of this later category of evidence is presented in Appendix XXV. Evidence consistent with the hypothesis would be of the search for status as a strong motivator of further steps along the process of professionalisation in the case of Councils of status seeking associations, and as a weak motivator of any similar steps in the case of Councils of status maintaining associations (Table 3.2).

During the course of participant observation an attempt was made at qualitative assessment of the relative importance of the search for status among the various factors (explicit and implicit) identified by the participant observer as motivating Councils to consider, or take, further steps along a process of professionalisation. Judgements regarding which factors were important influences on decisions, and concerning their relative strength as a 'motivator', were inevitably subjective.

### BGA / BBGS

So far as the questionnaire evidence is concerned, eight of nine BGA respondents perceived a gap between the BGA's existing status and the level of status the respondents would like to see it achieve (Q26) compared with BBGS respondents who were evenly split on this question. Similarly, eight out of nine BGA respondents favoured specific action to close this perceived status gap (Q27) while three quarters of BBGS respondents did not favour such action. This evidence (Summary Table 10.16-18 and Table 10.16 in Appendix XXXI) does not support the hypothesis.

**SUMMARY TABLE 10.16-18****Views of Individual Questionnaire Respondents Relating to an Increase in Professional Association Status****Percentage of Those Responding to Each Question:**

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
<b><u>Perception of a Status Gap (Q26)</u></b>						
Yes	89	50	35	83	-	82
No	11	50	65	17	100	18

**Support for Specific Action to Close Perceived Status Gap (Q27)**

Yes	89	25	86	100	-	82
No	11	75	14	-	-	18

**Association Objectives Relating to an Increase in Status (Q28)**

Yes	67	50	55	67	100	100
No	33	50	45	33	-	-

**Whether or Not Association Objectives Relating to an Increase in Status are Realistic (Q29)**

Yes	83	33	100	33	100	82
No	17	67	-	67	-	18



Two thirds of the BGA respondents believed the BGA had objectives relating to an increase in status (Q28), while BBGS respondents were evenly split on the question of whether or not the BBGS had such objectives. Over 80% of BGA respondents felt the BGA's objectives relating to an increase in status were realistic (Q29) while two thirds of BBGS respondents replying to this question expressed the view that such objectives in the case of the BBGS were unrealistic. Again the evidence (Summary Table 10.16-18 and Table 10.16 in Appendix XXXI) does not support the hypothesis.

The participant observation and interview evidence supported the hypothesis. BGA Committee members were more aware than BBGS Committee members of public perceptions of the value of business graduates and appeared much more concerned with enhancing the status of management education. BGA Committee members felt that the MBA qualification had yet to achieve the standing and recognition that it deserved.

Both BGA and BBGS interviewees questioned what was meant by 'further steps along the process of professionalisation' and enquired if the questioner had "any particular steps in mind". While BBGS interviewees were most interested in discussing future steps that might improve the standing of their association, BGA interviewees were much more concerned with steps that could be taken to increase understanding and acceptance of the value of an MBA degree.

Prima facie, the 'publications' category of evidence did not support the hypothesis. The BGA was particularly concerned about the status of the business schools and the 'MBA' qualification.

ICA / SCCA

Only some one in three LSCA questionnaire respondents perceived a gap between the existing status of their professional association and the level of status they would like to see it achieve (Q26), while five out of six SCCA respondents perceived such a gap. Six of the seven LSCA respondents perceiving a 'status gap' favoured specific action to close it, as did all the SCCA respondents perceiving such a gap (Q27). This evidence (Summary Table 10.16-18 and Table 10.17 in Appendix XXXI) supports the hypothesis.

A small majority of LSCA questionnaire respondents felt their professional association had objectives relating to an increase in status, while two thirds SCCA respondents felt their professional association had such objectives (Q28). All LSCA respondents (eleven) felt these objectives of their professional association were realistic (Q30), while only a third of SCCA respondents felt that similar objectives of their professional association relating to an increase in status were realistic. This evidence (Summary Table 10.16-18 and Table 10.17 in Appendix XXXI) supports the hypothesis.

ICA interviewees tended to question whether there were significant further professionalisation steps which could be taken by their association (eg "Haven't we arrived?", "What steps?"). SCCA interviewees, in comparison, were very conscious that there were steps which could be taken (eg 'Membership of the CCAB', 'Royal Charter'). They felt the SCCA faced an uncertain future if it did not take these steps. In the words of one SCCA interviewee: "Without 'recognition' there is no reason for anyone to join us. We will not exist for more than ten years if we don't get there - the CCAB bodies are there, we are not".

The participant observation and interview evidence supported the hypothesis. The motivation for further progress along the process of professionalism in the case of the LSCA appeared to reflect a desire to maintain the LSCA/ICA standing as a leading professional association in a changing world, and in particular in response to rising public and member expectations, while the motivation for such progress in the case of the SCCA appeared more related to the existence of an acknowledged gap compared with the stage of development reached by the chartered bodies and a recognition that specific steps (eg Code of Practice) had yet to be taken.

The published information evidence (see Appendix XXV) revealed an absence of major ICA developments resulting from the fact that the ICA had already progressed to an advanced stage of professionalisation, and acknowledgement by the SCCA that there were further steps along the process of professionalisation which its Council members felt it ought to take.

#### **IoD, BIM and ICSA / IM, CAM and IPR**

The 'questionnaire' category of evidence is supportive of the hypothesis. The ICSA respondents did not perceive a gap between the existing status of their professional association and the level of status they would like to see it achieve, while fourteen of seventeen IPR respondents both perceived such a gap and favoured specific action to close the status gap (Summary Table 10.16-18 and Table 10.18 in Appendix XXXI).

Both ICSA respondents felt their professional association had objectives relating to an increase in status and that such objectives were realistic. All seventeen IPR respondents felt their professional association had objectives relating to an increase in status, 80% of whom believed these objectives to be realistic. This evidence (Summary Table 10.16-18 and Table 10.18 in Appendix XXXI) supports the view that the IPR was seeking further progress along the process of professionalisation.

The participant observation and interview evidence supported the hypothesis. ICSA Council members appeared to consider that the association had already reached a satisfactory stage in the process of professionalisation and further significant steps were not as apparent as was the case with the other professional associations. While both the IoD and BIM were conscious that further steps could be taken along the process of professionalisation, their Councils were more satisfied than their IM, CAM and IPR counterparts with the overall level of status achieved, and hence the search for status per se did not emerge as such a strong motivator. Two BIM interviewees identified the acquisition of a Royal Charter as a 'further step' which their association could take, and one which would largely confirm the status the BIM had achieved.

The 'search' for status was undoubtedly a motivator in the case of the IM, CAM and IPR. Interviewees of all three associations mentioned the desirability of a Royal Charter as a further step that would undoubtedly raise the status of their associations. The IPR, to a greater extent than the IM or CAM, appeared to be motivated by a sense or notion of a 'model' or standard process of professionalisation through which professional associations were perceived to pass.

While the search for status may not have been such a strong drive in the case of status maintaining bodies, it was still in evidence (see Appendix XXV). It emerges from the published information evidence as a particularly strong motivator in the case of CAM and IPR. The search for status, standing and recognition was a central motivator underlying CAM activity throughout the period of the study. In the case of the IPR, the search for status emerged as a major motivator in the period 1984-85.

### Summary

Taken as a whole, the evidence in respect of the BGA and BBGS did not support the hypothesis, while in the case of the 'accounting' associations (ICA/SCCA) and the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR) the evidence, taken as a whole, appeared to support the hypothesis.



### Conclusion

The evidence suggests the hypothesis has some validity, in the sense of evidence consistent with it, for associations studied other than the matched pair (BGA/BBGS), the membership of which was made up of business graduates. This finding could reflect the fact that both the BGA and BBGS conferred membership on the basis of qualifications awarded by other institutions and sought recognition of the 'MBA' or business studies degrees in general independently of their 'recognition' as associations.

As a crude indicator of search for status as a motivator (in the case of Councils that perceive their associations as relatively low in status), it was decided to compare the average of the percentage responses to questions (Q27 and Q28) in the individual questionnaire (Appendix VII) concerning whether or not the respondents from the six associations in respect of which individual questionnaires were returned, supported specific action to close a status gap and these associations had objectives relating to an increase in status. The use of responses to both these questions (see Summary Table 10.16-18) allows one to measure 'motivation' in terms of both the desire for, and the willingness to take, action. The resulting continuum (see Table 3.2), ranking these association Councils from the one with the 'strongest' motivation to the one with the 'weakest', on the basis of this single and crude measure, is as follows: IPR (91%), SCCA (83.5%), BGA (78%), LSCA (70.5%), ICSCA (50%), BBGS (37.5%).

The position of the BGA in the continuum probably reflects the concern of BGA Committee members (expressed in interviews) with the status of the MBA as a qualification, rather than with the status of the BGA as an association. Position in the continuum appears not to be consistent with categorisation as an 'accounting' or 'management' association, but, other than in the case of the 'business graduate' associations, does appear to be consistent with categorisation by status as 'status seeking' or 'status maintaining'.

## 10.6 ACTIVITY AND STATUS GAPS

(xvii) Councils that perceive their associations to be relatively low in status and which perceive a gap between an existing level of status and a desired status target or level of perceived satisfactory status favour status-enhancing activity rather than a lowering of a target threshold of satisfactory status.

### Introduction

The hypothesis was tested by questionnaire and participant observation. It was necessary, in collecting evidence, to distinguish between associations which perceived a gap between an existing level of status and a desired status target or level of perceived satisfactory status, and those associations which did not perceive such a gap. Evidence consistent with the hypothesis would be of status seeking associations which perceived such a gap favouring status enhancing activity to raise or move upwards an existing level of status, while status maintaining associations, satisfied with the level of status they had achieved, did not perceive such status-enhancing activity as relevant to their needs (Table 3.2).

In order to identify implicit as well as explicit status 'targets', assess perceptions, and form a judgement on whether or not particular levels of status were 'desired', or were regarded as 'satisfactory', a qualitative participant observation process was used. The task was complicated by the need to assess collective perceptions, desires and views of Councils or groups in the context of the contributions of individual members of these Councils. The participant observer attempted to be sensitive to 'reactions' to such contributions on the part of Councils as a whole as well as to the thinking and motivation of those individual Council members that made them. Inevitably subjective judgement was involved.

BGA / BBGS

The questionnaire (Q26, Q27 and Q28) evidence (Summary Table 10.16-18 and Table 10.16 in Appendix XXXI) supports the hypothesis in the case of the BGA (categorised as a status maintaining association) but not in the case of the BBGS (categorised as a status seeking association). This result could be explained by the concern shown by the BGA towards the status of the 'MBA' qualification apart from the question of its own status as an association.

The participant observation evidence supported the hypothesis. In the case of the BGA, perceptions of a status gap appeared to relate more to the MBA as a qualification than to the BGA as an association. In contrast BBGS Committee discussions focused primarily on the status of the BBGS as an association, and not upon the qualifications that were the basis of BBGS membership.

ICA / SCCA

The questionnaire (Q26, Q27 and Q28) evidence (Summary Table 10.16-18 and Table 10.17 in Appendix XXXI) supports the hypothesis. While some two thirds of LSCA respondents did not perceive a 'status gap', all but one of those that did supported specific action to close the perceived status gap. A majority of LSCA respondents felt the association had objectives relating to an increase in status and all LSCA respondents felt these to be realistic.

In the case of the SCCA respondents, while two thirds felt the association had objectives relating to an increase in status, two thirds felt these objectives to be not realistic.

The 'participant observation' category of evidence also supported the hypothesis. SCCA evidence was particularly consistent with the hypothesis. In the case of the ICA/LSCA, one could question the applicability and relevance of the hypothesis in that participant observation revealed an acceptance and belief that the ICA was not 'relatively low in status', nor did it have a 'status gap' in the sense that an unrecognised association would perceive such a gap.

### IoD, BIM and ICSA / IM, CAM and IPR

The questionnaire (Q26, Q27 and Q28) evidence (Summary Table 10.16-18 and Table 10.18 in Appendix XXXI) supports the hypothesis. The degree of common agreement or consensus on the part of IPR responses was the highest of any association on the issue of response to a 'status gap'.

The participant observation evidence also supported the hypothesis. The hypothesis in the form in which it is formulated appears, *prima facie*, more applicable to the IM, CAM and IPR group of associations and less applicable to the IoD, BIM and ICSA group. The participant observation evidence supported this view. The evidence for the IM, CAM and IPR was certainly consistent with the hypothesis, although the vigour and determination with which status enhancing activity was pursued tended to wax and wane over time.

In the case of the IM and IPR, participant observation suggested that many of the Council members of these associations accepted Royal Charter status as 'the' status threshold to which professional associations aspired. The threshold appeared to be viewed as relatively fixed and absolute. It was also viewed in black and white terms, one either has or does not have a Royal Charter. For those holding this view, lowering the target threshold of satisfactory status could not be accomplished and was not perceived as a practical option.

### Summary

Taken as a whole, the evidence for the 'business graduate' associations (BGA/BBGS) supports the hypothesis. In the case of the 'accounting' associations (ICA/SCCA) and the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR), the evidence also supports the hypothesis.



### Conclusion

The evidence supports the hypothesis. It would appear that both status maintaining and status seeking associations generally favour action, and initiate action, as appropriate, in the event of perceiving a gap between an existing level of status and a desired and/or perceived satisfactory level of status.

It is possible that desired levels of status represent steps or stages on a process of professionalisation that are externally influenced and relatively fixed. With certain forms of recognition (eg statutory recognition), degrees of achievement may not be possible.

The individual questionnaire (Appendix VII) contained a series of questions (Q26-29) concerning whether or not: a 'status gap' was perceived; specific action to close the perceived 'status gap' was favoured; objectives relating to this had been formulated; and these objectives were realistic. Given that responses to these questions had been obtained from Council members of six associations, it was thought that a continuum (see Table 3.2) could be constructed of these associations based upon responses to the question of whether or not respondents supported specific action to close a perceived status gap (Q27). Such a continuum from the association Council whose members most strongly favoured such specific action (see Summary Table 10.16-18) to the association Council whose members least favoured (such action not being relevant if a status gap was not perceived) such specific action, would be as follows: SCCA, BGA, LSCA, IPR, BBGS, ICSA.

The interview and questionnaire evidence suggests that the position of the BGA on the continuum reflects the concern of BGA respondents with a 'status gap' relating to the MBA as a qualification, rather than to the BGA as an association. For the 'accounting' and 'management' associations, their positions on the continuum would appear to relate both to their categorisation as 'accounting' or 'management' associations, and to their status categorisation as 'status seeking' or 'status maintaining'.

## 10.7 OPPORTUNISM

(xxxii) Councils that perceive their associations as being relatively low in status are more opportunistic in terms of new opportunities for status enhancing activities.

### Introduction

The hypothesis was tested by minutes, participant observation and interview. Responses to Q20 had some relevance to the hypothesis so far as new activities per se are concerned. Evidence consistent with the hypothesis would be of more opportunism on the part of Councils of status seeking associations in terms of new opportunities for status enhancing activities, and less opportunism in respect of such opportunities on the part of Councils of status maintaining associations (Table 3.2).

During the process of participant observation, the participant observer was forced to make qualitative assessments of the extent to which actions observed were 'opportunistic'. Quantitative measures were thought not to be appropriate. For example, if one had measured the amount of time taken to reach a decision or the extent of consultation involved (ie quick decisions bypassing or cutting short the usual consultation process as a proxy for opportunism) one might have failed to take account of such factors as the importance of the decisions involved. Thus one association might take decisions relatively quickly as a result of those decisions being relatively unimportant and not because participants in the decisions were opportunistic.

### BGA / BBGS

The 'minutes' category of evidence was not sufficient to conclusively support or refute the hypothesis.

The participant observation and interview evidence did not support the hypothesis in that the BBGS Committee was not noticeably more opportunistic in respect of new opportunities than its BGA counterpart. A similar and relatively high proportion of the relevant activities of both the BGA and the BBGS Committees was ongoing and proactive, in comparison with the similar and relatively lower proportion of activity that was ad hoc and reactive.

In BBGS interviews, to a greater extent than in BGA interviews, a distinction emerged between a desire for opportunism and an ability to be, or possession of the means to be, opportunistic. The BBGS in particular was unable to initiate activities it would like to have undertaken as a result of being unable to attract individuals onto its Committee who would be willing to do the necessary work (eg "How could we be opportunistic? We haven't the manpower to seize an opportunity if one turned up").

In the case of the BGA, opportunism was tempered less by resource constraints, and more by considerations of take up by members and the relevance to their interests of proposed activities. In the words of one BGA interviewee, "We are always open minded, but if people are not interested in it, nothing will happen. A new idea needs a champion." Another BGA interviewee made the point: "We do have some spare funds, particularly for research. The problem is defining projects for which there is a real need."

So far as new activities in general are concerned, the BBGS questionnaire (Q20) respondents place a marginally higher relative importance upon initiating new activities (Table 10.19). This evidence is supportive of a view put in interview situations that many members of the BGA Committee were, on the whole, content with the BGA's current pattern of activities.

TABLE 10.19Importance Given by Individual Questionnaire Respondents to the Initiation by Their Professional Association of New Activities (Q20)

	Average <u>Imp</u>	Extremely <u>Imp</u>	Very <u>Imp</u>	Fairly <u>Imp</u>	Little <u>Imp</u>	Not <u>Imp</u>
BGA	3.2	2	1	4	1	1
BBGS	4.0	2	1	-	1	-
LSCA	3.2	1	7	10	1	2
SCCA	3.8	3	-	2	1	-
ICSA	4.0	-	2	-	-	-
IPR	3.2	2	2	10	3	-

ICA / SCCA

The 'minutes' category of evidence was not sufficient to conclusively support or refute the hypothesis.

The participant observation and interview evidence provides some but not conclusive support for the hypothesis. What was apparent to the observer and interviewer was that the SCCA appeared to be more opportunistic than the LSCA, in part because of the way in which it conducted its proceedings and took its decisions. The procedure of the LSCA was more formal and its Committee system more developed. The LSCA secretariat was able, at relatively short notice, to produce papers and background notes on ad hoc issues, or in response to unplanned or unexpected developments. In such situations the relative lack of secretarial resource on occasion precluded SCCA consideration of emergent issues. The SCCA Council consciously let opportunities pass by because of the lack of secretarial resource to implement.

In interview situations, SCCA interviewees tended to take some pride in instances of opportunism in which they had played a part (eg "It was my idea, I moved quick and seized the opportunity"). Opportunism was held to be a good thing and participation in opportunistic activity was perceived and used as a justification of continued Council membership.

In contrast, in the case of LSCA interviews, the interviewer was pressed to define what was being meant by 'opportunistic'. The interviewer sensed that LSCA interviewees did not necessarily accept that being 'opportunistic' was a good thing (eg "I don't like the sound of 'opportunistic', The English Institute shouldn't really need to be opportunistic"). Stress was laid upon the need to anticipate events and not to act without due care and consideration. LSCA interviewees made explicit the possibility that the 'wrong' opportunistic activity could prejudice the ICA's standing rather than enhance it.



So far as questionnaire responses relating to 'initiating new activities' (Q20) were concerned, SCCA respondents place a relatively higher importance than LSCA respondents upon initiating new activities in general (Table 10.19). The 'pattern' of LSCA responses suggests a stronger consensus than was the case with the SCCA in respect to the issue of new activities.

#### IoD, BIM and ICSA / IM, CAM and IPR

The 'minutes' category of evidence was, as in the case of the other groups of associations, not sufficient to conclusively support or refute the hypothesis. While evidence existed relating to new activities, most of this did not relate to degrees of opportunism with which such activities were proposed, assessed and initiated.

The participant observation and interview evidence supports the hypothesis. Significantly, the IoD, BIM and ICSA questioned the extent to which their decision making procedures would enable them to be 'truly' or 'really' opportunistic (eg "You can't afford to go off half cock" (IoD), "Things have to be properly considered" (ICSA), "Council approval may need to be obtained, we have to be careful" (BIM)). No such inhibitions were expressed in IM and CAM interviews (eg "The Committee should give a lead" (CAM), "Marketing is all about creating opportunities" (IM)). The IPR interviewees balanced a belief that, on occasion, opportunism was a 'good thing' with an acknowledgement that, to be successful, all significant new activities should have the support of the full IPR Council and the full authority of the Institute behind them.

The questionnaire evidence on 'initiating new activities' (Q20) was not sufficient to conclusively support or refute the hypothesis (Table 10.19).

### Summary

The hypothesis in the case of the BGA and BBGS is not conclusively supported or refuted. For the 'accounting' associations (ICA/SCCA), while, overall, there is some prima facie support for the hypothesis, it could not be said to be conclusively supported. So far as the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR) are concerned, some support for the hypothesis existed, but it could not be said to be conclusive.

### Conclusion

While there is some support for the hypothesis, it could not be said to be conclusively tested. It is possible that opportunism is a result of management style and practice rather than position on a status maintaining, status seeking continuum.

The responses to the question (Q20) in the individual questionnaire (Appendix VII) on the importance of 'new activities' could be used to develop a continuum of association Councils on the basis of the average importance (see Table 10.19) attached to such activities. The continuum of association Councils in respect of which individual questionnaires were returned (from greatest to least 'average importance') is as follows: BBGS/ICSA, SCCA, BGA/LSCA/IPR. Such a continuum is not satisfactory, as no fewer than five of the six associations share the same 'average importance' ranking as at least one other association. Furthermore, the degree of importance placed upon new activities need not necessarily reflect the degree of 'opportunism' with which opportunities for such new activities were sought and grasped.

Accordingly, a continuum of all the associations studied was developed based upon the qualitative and subjective assessment by the author of interview and participant observation evidence. Such a continuum (see Table 3.2) from the association Council displaying the most, to the association Council displaying the least, opportunism would be as follows: CAM, IM, SCCA, IPR, BIM, IoD, LSCA/ICSA, BGA/BBGS.

The relatively low 'opportunism' ranking of the 'business graduate' associations on the continuum reflects the real (BBSG resources) and imposed (BGA Committee members' interests) constraints upon their ability to be 'opportunistic'. In the case of the other associations (with the ability, in terms of resources, to be 'opportunistic'), position in the continuum appears to relate more to status categorisation as 'status seeking' or 'status maintaining' than to categorisation as an 'accounting' or 'management' association.

## 10.8 PROMOTIONAL ACTIVITY

(xxxiv) Councils that perceive their associations as being relatively low in status question to a greater degree the effectiveness of promotional activity.

### Introduction

The hypothesis was tested by participant observation and by minutes. Evidence consistent with the hypothesis would be of a high degree of questioning of the effectiveness of promotional activity in the case of Councils of status seeking associations, and a low degree of such questioning on the part of Councils of status maintaining associations (Table 3.2).

Consideration was given to the use of such quantitative measures as the number of instances of references in Council discussions to the returns or responses from promotional activity in the course of participant observation. However, the frequency with which such discussions took place was found to be a matter of convention regarding which items were placed on Council agenda rather than Sub-Committee agenda, or of reporting and accountability practice as much as 'interest' or 'concern'. Hence the assessment of degree of concern that was made in participant observation attempted to take account of 'intensity' of concern or strength of shared feeling expressed in relevant discussions rather than the frequency with which such discussions took place.

### BGA / BBGS

The participant observation evidence was not supportive of the hypothesis. The BGA Council questioned the effectiveness of promotional activity to a greater extent than the BBGS Committee, largely because it had significantly more promotional activity in absolute terms to question.

The 'minutes' evidence was also not consistent with the hypothesis. There was little BBGS discussion of promotional activity.

The BGA appeared more cost-effectiveness conscious in respect of promotional activity. In 1983, the BGA Committee received a presentation from a public relations consultancy on a proposed programme for the BGA, but decided not to proceed in view of the costs involved and, instead, responsibility for public relations was assumed by a member of the Committee and, subsequently, the Director.<sup>(1)</sup>

The 'PR Brief' prepared for the BGA in 1983 in connection with seeking external PR consultancy support established as an 'overall objective', "To increase awareness of the Business Graduates Association as the organisation which represents the interests of business graduates (MBAs) in the UK [and] promotes the increase of post-graduate management education in the UK".<sup>(2)</sup>

For a number of years, the BGA retained the services of an 'honorary PR representative'.<sup>(3)</sup>

#### ICA / SCCA

The participant observation evidence appeared to support the hypothesis. Within the SCCA Council, there was continuing formal and informal discussion regarding the cost-effectiveness of the activities of the promotion and development committee.

While informal discussion supported the hypothesis, an examination of formal minutes of the LSCA and SCCA revealed that both bodies exhibited concern from time to time for the cost-effectiveness of all activities in general rather than promotional activity in particular.

#### IoD, BIM and ICSA / IM, CAM and IPR

The hypothesis was neither supported nor refuted by participant observation evidence. The ICSA Council appeared particularly concerned with measuring and monitoring the effectiveness of promotional activity. In the case of the status seeking associations, less resources were available for use in promotional activity.



The minutes evidence did not support the hypothesis. While recognising the importance of promotional activity, the status seeking associations exhibited a greater tendency to view promotional activity as discretionary and to be undertaken as and when resources were available. For example, in 1983, the IPR appointed a public relations consultancy, Dewe Rogerson, as 'honorary consultants to the Institute'.<sup>(4)</sup>

### Summary

The hypothesis was not supported in the case of the BGA and BBGS and some doubt was thrown upon its validity. In respect of the 'accounting' associations (ICA/SCCA), there was some support for the hypothesis. The evidence relating to the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR), however, did not support the hypothesis.

### Conclusion

The evidence did not support the hypothesis and suggested that the extent to which an association questioned the effectiveness of its promotional activity was more conditioned by whether or not such activity was significant (eg as a proportion of total expenditure), and whether or not the Council or Committee was generally managerially efficient than by whether the association was in a status seeking or status maintaining category.

The terms of reference of the LSCA General and Publicity Subcommittee specifically included consideration of the results of publicity activities.<sup>(5)</sup>

In the absence of an available quantitative measure, the qualitative and subjective assessment of the author, based upon participant observation, was used to develop a 'questioning of promotional activity' continuum (see Table 3.2) ranking of all the associations studied. The continuum, from the association Council questioning the effectiveness of promotional activity to the highest degree, to the association Council questioning such activity the least, is as follows: SCCA, BGA, ICSA, CAM, IM/!PR, BBS, IoD/BIM, LSCA. Position on this continuum would appear to relate neither to association categorisation by 'field of operation' (ie as 'business graduate', 'accounting' or 'management') or by 'status' (ie as 'status seeking' or 'status maintaining').

### 10.9 STATUS DRIVE AND ASSOCIATION ACTIVITY TO INCREASE STATUS FINDINGS

The findings relating to the concerns of professional association Councils with status drive and professional association activity to increase status are summarised in Table 10.20. Of the seven hypotheses [(xiii), (xiv), (xv), (ix), (xvii), (xxxii), (xxxiv)] concerned with association status drive and association activity to increase status, only one (xvii) is conclusively supported, in the sense of consistency of evidence with it, for all three groups of associations studied. Three hypotheses [(xiv), (xv), (ix)] are however supported for both the accounting associations and management associations while a further hypothesis (xiii) is supported for the accounting associations only.

- Hypothesis (xiii) concerning Drive for Standing, Recognition, Identify and Self-respect (Section 10.2) appears to have validity, in the sense of consistency of evidence with it, for the accounting associations but not for the associations the members of which are business graduates.
- Hypothesis (xiv) concerning State Recognition (Section 10.3) is prima facie supported in the case of the associations studied other than those the members of which are business graduates in the sense that the evidence is consistent with it.
- Hypothesis (xv) concerning New Activities (Section 10.4) is supported in the case of the associations studied other than those the members of which are business graduates in the sense that the evidence is consistent with it.
- Hypothesis (ix) concerning Search for Status or Motivator (Section 10.5) has validity in the sense of consistency of evidence with it, in the case of the associations studied other than those the membership of which is composed of business graduates.
- Hypothesis (xvii) concerning Activity and Status Gaps (Section 10.6) is supported in the sense that the evidence is consistent with it.

**TABLE 10.20**  
**Findings Relating to Hypotheses Concerned with Association Status Drive and Activities to Increase Status**

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Section</u>	<u>Business Graduate Associations</u>	<u>Accounting Associations</u>	<u>Management Associations</u>	<u>Overall</u>
(xiii)	Drive for Standing, Recognition, Identity and Self-respect	10.2	Not supported	Supported	Neither supported nor refuted	Evidence consistent for Accounting Associations only
(xiv)	State Recognition	10.3	Not supported	Supported	Prima Facie supported	Evidence consistent for Accounting and Management Associations
(xv)	New Activities	10.4	Not supported	Supported	Supported	Evidence consistent for Accounting and Management Associations
(ix)	Search for Status as Motivator	10.5	Not supported	Supported	Supported	Evidence consistent for Accounting and Management Associations
(xvii)	Activity and Status gaps	10.6	Supported	Supported	Supported	Supported (evidence consistent)
(xxxii)	Opportunism	10.7	Not supported nor refuted	Not conclusively supported	Not conclusively supported	Not conclusively supported
(xxxiv)	Promotional Activity	10.8	Validity doubted	Some support	Not supported	Not supported

- Hypothesis (xxxii) concerning Opportunism (Section 10.7) has not been conclusively tested.
- Hypothesis (xxxiv) concerning Promotional Activity (Section 10.8) is not supported.

Chapter Twelve elaborates the findings and relates them to a discussion of the present conceptualisation of professionalism, while Chapter Thirteen considers their implications for the policies and practices of Occupational Associations.

Seven hypotheses are considered in this chapter. The continua which have been developed in respect of each of these hypotheses (albeit on the basis of crude and summary indicators) are consistent with the status categorisation of associations as 'status seeking' or 'status maintaining' in the case of hypothesis (xv) concerning new activities, hypothesis (ix) concerning search for status as a motivator and hypothesis (xxxii) concerning opportunism. The continuum in respect of hypothesis (xvii) concerning activity and status gaps is consistent with categorisation by status, and also categorisation by 'field of operation' as a 'business graduate', 'accounting' or 'management' association. In the case of the remaining three hypotheses, concerning drive for standing, recognition, identity and self-respect (hypothesis xiii), state recognition (hypothesis xiv), and promotional activity (hypothesis xxxiv), the results are 'indeterminate' and do not appear consistent with either form of categorisation.

Following chapters dealing with the concerns of association Councils with status and status drive and association activity to increase status (Chapter Nine and this chapter respectively), the next chapter presents the evidence relating to the hypotheses dealing with the concerns of association Councils other than explicitly status concerns.



CHAPTER ELEVEN  
CONCERNS OF COUNCILS OTHER THAN  
EXPLICITLY STATUS CONCERNS

11.1 INTRODUCTION

This chapter presents the findings of the study in respect of those hypotheses dealing with the concerns of association Councils other than explicitly status concerns, namely hypotheses (xix), (xx), (xxiii), (xxiv), (xxv), (xxvii), (xxx) and (xxxi). The findings are presented in Sections 11.2-11.9 as follows:

- Hypothesis (xix) concerning Relevance of Expertise - Section 11.2
- Hypothesis (xx) concerning the Encouragement of Volunteers - Section 11.3
- Hypothesis (xxiii) concerning Membership Development - Section 11.4
- Hypothesis (xxiv) concerning VIP Member Identification - Section 11.5
- Hypothesis (xxv) concerning Explicit Acknowledgement of Membership - Section 11.6
- Hypothesis (xxvii) concerning Code of Practice and Disciplinary Matters - Section 11.7
- Hypothesis (xxx) concerning Two-way Communication with Members - Section 11.8
- Hypothesis (xxxi) concerning Publicising Representation Activity - Section 11.9

For ease of reference to the findings relating to each hypothesis, each section 11.2-11.9 begins on a new page. Section 11.10 summarises the conclusions of the findings in respect of this group of hypotheses.

In order that the documentary evidence upon which the findings are based does not interrupt the flow of presentation, this evidence is summarised in this chapter and a selection of this evidence is presented in the related appendices as follows:

- Hypothesis (xix) concerning Relevance of Expertise (Section 11.2) - Appendix XXVI
- Hypothesis (xx) concerning the Encouragement of Volunteers (Section 11.3) - Appendix XXVII
- Hypothesis (xxvii) concerning Code of Practice and Disciplinary Matters (Section 11.7) - Appendix XXVIII
- Hypothesis (xxx) concerning Two-way Communication with Members (Section 11.8) - Appendix XXIX
- Hypothesis (xxxi) concerning Publicising Representation Activity (Section 11.9) - Appendix XXX

## 11.2 RELEVANCE OF EXPERTISE

- (xix) Councils that perceive their associations as being relatively low in status exhibit a greater concern with establishing the relevance of the expertise claimed for members to the needs of society.

### Introduction

The hypothesis was tested by questionnaire and by interview and publications. A selection of published evidence relating to this hypothesis is presented in Appendix XXVI. Evidence consistent with the hypothesis would be of the relevance of expertise being stressed by the Councils of status seeking associations and not stressed by the Councils of status maintaining Councils (Table 3.2).

### BGA / BBGS

The questionnaire evidence consisted of responses to questions dealing with importance of 'views on professional issues' (Q18), 'professional association activities' (Q20), 'challenges to professional association' (Q24) and 'recognition of professional association' (Q30). Overall this category of evidence does not support the hypothesis (Summary Table 11.1-3 and Table 11.1 in Appendix XXXI). The result could reflect the concern shown by the BGA with the public acceptance of the 'MBA' qualification, while the BBGS was primarily concerned with first degrees in business studies which had not attracted the same public criticism as 'MBA' degrees.

The interview evidence does not support this hypothesis. Committee members of the BGA were more concerned with establishing the relevance of the skills of business graduates than were the Committee members of the BBGS. For one BGA interviewee: "The key issue is establishing the relevance of the MBA. This should be the overriding objective of the BGA".

SUMMARY TABLE 11.1-3Importance Given by Individual Questionnaire Respondents to the Establishment of the Relevance of the Expertise Claimed for Members of Their Association

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
<u>Views on Professional Issues (Q18)</u>						
Service to Society	4.4	4.0	3.6	3.7	4.5	3.6

Professional Association Activities (Q20)

Establishing Relevance of Professional Skills to Needs in Society	3.6	3.5	3.8	3.7	5.0	3.9
Monitoring Public/Client Reactions/Feedback	3.5	3.7	3.3	3.3	3.5	3.8

Challenges to Professional Association (Q24)

Relevance of Skills in Society	4.1	3.2	4.0	4.0	5.0	3.9
Public Attitudes and Public Opinions	3.1	2.0	3.7	3.7	5.0	4.1

Recognition of Professional Association (Q30)

Recognition by Employers	4.2	3.7	4.1	4.7	5.0	4.6
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BGA interviewees were relatively more aware of external challenges to, and questioning of, the standing of business graduates and the role of business schools. They did not take the assumed relevance of their qualification for granted. In contrast, BBGS interviewees were more inclined to assume that being a business graduate was a good thing per se, and were less concerned with questions of relevance. When issues of relevance arose, BBGS interviewees were more inclined to relate these to the relevance of their qualification for them as individuals and to their personal careers (eg "I wouldn't have taken a business studies degree if I had not thought that it was relevant").

BGA interviewees were more aware of the need for their qualification to be perceived by their employers as relevant to the needs of these employers. These BGA interviewees tended to relate the extent to which their careers would benefit from possession of a business degree (MBA) rather more to the 'external' perceptions of their employers.

From the 'publications (and minutes)' category of evidence (see Appendix XXVI) the BGA appears as, compared with the BBGS, more concerned with and engaged in more activities regarding establishing the relevance of the expertise of 'MBAs'. This concern on the part of the BGA was evidenced by regular surveys, working party reports and business school seminars. BBGS activity was, in comparison, more intermittent.

#### ICA / SCCA

Overall, the questionnaire evidence in the form of responses to questions dealing with 'views on professional issues' (Q18), 'professional association activities' (Q20), 'challenges to professional association' (Q24) and 'recognition of professional association' (Q30), does not support the hypothesis (Summary Table 11.1-3 and Table 11.2 in Appendix XXXI). The pattern of the LSCA and SCCA responses is similar on this issue.



In the interview evidence there was some support for the hypothesis but such evidence was finely balanced and could not be regarded as conclusive. What did emerge in interview sessions was a different perception on the part of SCCA, as opposed to ICA, interviewees of what the needs of society were. SCCA respondents tended to articulate needs in terms of, and relate them to, 'the smaller business'. To ICA interviewees, the 'needs of society' encompassed a much broader range of interests from individuals, through companies large and small, to government. ICA interviewees appeared more aware of relevance obligations to a notion of 'society' over and above their obligation to clients. To some SCCA interviewees, 'society' was almost synonymous with 'client', the needs of society being interpreted in terms of, and expressed through, the requirements of their clients for their services.

SCCA interviewees appeared relatively confident that the Society's members had "something to offer the smaller business". In the words of one SCCA interviewee: "Relevance is what distinguishes us from the English Institute. The 'chartered' see relevance in terms of technical complexity and meeting the requirements of Statements of Standard Accounting Practice that are too elaborate for the smaller business. To us relevance is giving our customers what they want at a price they can afford, and not giving them what we say they should have".

The publications (and minutes) evidence did not support the hypothesis. The selection presented in Appendix XXVI illustrates the importance attached by the ICA to establishing and re-enforcing the continuing relevance of the expertise of the chartered accountant. Both the ICA and the SCCA have been concerned with explaining the relevance of the skills of their members to the needs of the smaller business.

IoD, BIM and ICSA / IM, CAM and IPR

The questionnaire evidence summarised in Table 11.3 draws from responses to the questions on 'views on professional issues' (Q18), 'professional association activities' (Q20), 'challenges to professional association' (Q24) and 'recognition of professional association' (Q30). This category of evidence was not sufficient to support or refute the hypothesis, but what evidence there is does not suggest that the hypothesis might be prima facie valid (Summary Table 11.1-3 and Table 11.3 in Appendix XXXI). Both ICSA and IPR questionnaire respondents appear similarly concerned with establishing the 'relevance' of their expertise.

The interview evidence revealed that four associations (ICSA, IM, CAM and IPR) were actively concerned with, thought about, and discussed formally and informally, the question of the relevance of the expertise claimed for their members to the needs of society, while, in contrast, among Council members of the IoD and BIM, such relevance tended in relative terms to be taken for granted and was not considered and discussed to anything like the same extent (eg "We wouldn't do it if it wasn't relevant").

It was clear from the interviews that not all interviewees shared the same opinion of, and perspective on, what was 'relevant' to the 'needs of society'. For the IoD interviewee relevance tended to be largely a question of "ensuring members understand their legal duties and liabilities". ICSA interviewees tended also to interpret 'relevance' in terms of 'up to date' technical and legal understanding. BIM and IM interviewees tended to interpret 'relevance' of individual members' skills in terms of 'competency skills'. Overall, while interviewees of all the 'management' associations appeared concerned with questions of relevance, those categorised as 'status maintaining' (IoD, BIM, ICSA) appeared marginally more concerned with 'relevance' in terms of the 'individual' skills of members. Those categorised as 'status seeking' (IM, CAM, IPR) appeared, in comparison, more concerned with establishing the 'relevance' of the overall function they represented (eg Marketing, Communication, Public Relations).

The 'publications (and minutes)' category of evidence (see Appendix XXVI) tended to suggest that professional subject matter and the extent to which it could be defined and externally understood was a more significant factor in terms of considerations relating to the establishment of the relevant of expertise than whether or not, prima facie, an association was in the status seeking or status maintaining category.

The IoD and BIM tended to articulate relevance in terms of the role of business and management, and the importance of enterprise, in general. In comparison, ICSA adopted more of a selective approach, promoting the relevance of its qualification to particular target sectors such as the government service.

The IM, in its promotion of the relevance of the expertise of its members, adopted the more general approach of the IoD and BIM, with stress upon the national importance of 'marketing'. CAM and the IPR concentrated rather more upon the relevance of the expertise of the individual member and upon how this expertise could be developed and recognised through studying for CAM qualifications and membership of the IPR. CAM focused particularly on the narrow promotion of relevance to potential employers of its graduates rather than to the public and opinion formers at large (as was the case with the IPR).

### Summary

The evidence in respect of the BGA and BBGS did not support the hypothesis. For both the 'accounting' associations (ICA/SCCA) and the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR), the evidence, on balance, did not support the hypothesis.

### Conclusion

The evidence does not support the hypothesis. It would appear that whether or not an association is in the status seeking or status maintaining category is not per se a useful predictor of whether or not the association will be relatively highly concerned with establishing the relevance of the expertise claimed for members to the needs of society. The relatively widespread concern for establishing the relevance of expertise of members could be a consequence of the perceived importance of knowledge and expertise and their practice as a distinguishing trait of the professional.

There was some acknowledgement that, in a more demanding 'market' environment, the demonstration of the relevance of professional expertise needed to occur on a continuing basis and reflect the context in which the work in question was performed and the expectations of those associated with it. A number of interviewees raised the issue of the likely future expertise expectations of employers. There was some agreement that employers would seek a broader view and wider mix of skills, an ability to be flexible and mobile between functions and to work in teams. A distinction emerged between the role of the manager and professional specialist. The expectation appeared to be that rather more of today's professionals would need to broaden their skills and become managers, while the 'professional specialists' could increasingly work outside of a traditional organisation on a consultancy or network basis.

The individual questionnaire (Appendix VII) contains a specific question (under Q20) on the importance of establishing the relevance of professional skills to needs in society. The average degrees of importance given by the respondents from the six associations in respect of which individual questionnaires were returned are given in Summary Table 11.1-3. Using the average responses to this question as a 'measure', one can rank the Councils of the six associations in a continuum (see Table 3.2) from the Council stressing the importance of 'relevance of expertise' the most, to the Council stressing it the least: ICOSA, IPR, LSCA, SCCA, BGA, BBGS.

Position on the continuum would appear to be consistent with categorisation of associations by 'field of operation' ('business graduate', 'accounting', or 'management') and by status ('status seeking' or 'status maintaining'). In the case of categorisation by status, the order of the positions of constituents of 'matched pairs' is the reverse of that suggested by the hypothesis.

### 11.3 THE ENCOURAGEMENT OF VOLUNTEERS

- (xx) Councils that perceive their associations as being relatively low in status exhibit a greater concern with formal and informal initiatives to encourage a flow of volunteers willing to assist association activities.

#### Introduction

The hypothesis was tested by minutes, publications, questionnaire and participant observation. A selection of the documentary evidence relating to this hypothesis is presented in Appendix XXVII. Evidence consistent with the hypothesis would be of volunteers willing to assist association activities being sought by Councils of status seeking associations and not sought by Councils of status maintaining associations (Table 3.2).

Participant observation evidence consisted of an informal assessment of both the incidence and the nature of the occasions when both formal and informal initiatives to encourage volunteers to come forward arose in Council discussion. In order to assess degree of concern it was felt necessary to do more than just count and compare the number of such initiatives. For example, one had to distinguish almost ritualistic appeals for the support of activities that would proceed independently of the response of the membership from those occasions when the implementation of an activity or programme was very dependent upon the number and type of volunteer who could be encouraged to 'step forward'. It was thought that quantitative assessment of the hypotheses considered in this chapter in the course of participant observation that involved continual recording of various 'numerical' indicators that would be required would interfere with the process of observation.



### BGA / BBGS

The minutes and publications evidence (see Appendix XXVII) while revealing a relatively high degree of concern on the part of both the BGA and BBGS is supportive of the hypothesis. In particular, while the BGA sought volunteers for particular areas of activity and projects (eg research), the BBGS sought volunteers for service as members of its governing organ which for much of the period of study was under strength.

The questionnaire evidence on 'professional association activity' (Q20) set out in Table 11.4 supports the hypothesis. Three out of four BBGS respondents put a 'very important' or higher importance upon encouragement of member involvement in association affairs compared with only two of nine BGA respondents.

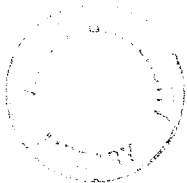
The participant observation evidence supports the hypothesis. Encouragement of volunteers was particularly important in formal and informal BBGS discussion from the point of view of identifying individuals to take on specific responsibilities for core activities without which the association could not continue and to relieve existing Committee members who on occasions only undertook BBGS activity out of a sense of responsibility and in the knowledge that, if they personally did not undertake the activity in question, then in the absence of an alternative, such activity would not be undertaken. In particular, the BBGS Chairman Doddi Rao was unable in certain years to identify a suitable and willing replacement.

Generally the BBGS Committee was below its constitutional membership. In contrast, the BGA did not during the period of study experience any difficulty in keeping its Committee up to full strength.

TABLE 11.4

Importance Given by Individual Questionnaire Respondents to the Encouragement of Member Involvement in Association Affairs (Q20)

	<u>Average</u> <u>Importance</u>	<u>Extremely</u> <u>Imp</u>	<u>Very</u> <u>Imp</u>	<u>Fairly</u> <u>Imp</u>	<u>Little</u> <u>Imp</u>	<u>Not</u> <u>Imp</u>
BGA	2.9	-	2	4	3	-
BBGS	3.7	1	2	-	1	-
LSCA	3.8	3	10	8	-	-
SCAA	3.5	1	2	2	1	-
ICSA	3.5	-	1	1	-	-
IPR	3.8	5	3	9	-	-



### ICA / SCCA

Evidence from the minutes and publications of the 'accounting' associations revealed that both the ICA and SCCA formally invited members to come forward and contribute to the work of their association and both used a Presidential appeal for this purpose (see Appendix XXVII).

The questionnaire evidence relating to 'professional association activity' (Q20) presented in Table 11.4 does not support the hypothesis, but it also is not sufficient to disprove it in that the pattern of the responses are similar for both the LSCA and SCCA. A marginally greater importance is placed by the LSCA respondents upon the encouragement of member involvement in association affairs but the margin is not sufficient to be conclusive.

The participant observation category of evidence supported the hypothesis. Securing suitable volunteers was a particular problem for the SCCA, the council members of which were on occasion concerned that unsuitable members might be elected to Council due to a lack of good candidates willing to stand for election. In contrast, LSCA elections were well contested and LSCA Committee members appeared to largely take it for granted that any candidate that was validly nominated in the elections for its Committee would be prima facie suitable, and there was relatively greater confidence in the electoral process. Given the relatively much smaller proportion of members voting in SCCA Council elections, existing SCCA Council members were relatively more concerned about such issues as canvassing, lobbying and particular interests swaying and producing an unrepresentative result.

### IoD, BIM and ICSA / IM, CAM and IPR

In respect of the minutes and publications evidence (see Appendix XXVII), there is a sense of greater urgency and importance in the appeals of CAM and IPR for volunteers, while those of the status maintaining associations have more of the sense of a 'ritual' about them.

The questionnaire evidence on 'professional association activity' (Q20) set out in Table 11.4, while not sufficient to conclusively support or refute the hypothesis, is to some degree supportive of it. The IPR responses suggest a spread of views on the encouragement of member involvement in IPR affairs.

The participant observation evidence is, overall, broadly supportive of the hypothesis. ICSA, CAM and the IPR appeared relatively more concerned than IoD, BIM and IM in the encouragement of a flow of volunteers. ICSA was particularly concerned with the contribution of specialist expertise and participation in panels and vocational groups, while in contrast CAM and IPR with significantly more limited secretariat resources than IoD, BIM, ICSA and IM appeared more concerned with attracting sufficient volunteers to keep certain activities in being and to ensure that Councils/Committees were up to strength, with new faces appearing to guarantee a future succession.

Members of the Councils of IoD, BIM, ICSA and IM appeared much more willing to assume that their associations would continue and in the normal course of things would attract sufficient volunteers to remain in being while secretariat resources would be sufficient to provide the basic work of the association. In the case of CAM and IPR, certain elements of such core activity/work was often undertaken by members on a voluntary basis.

### Summary

The evidence collected on the BGA and BBGS supports the hypothesis. The evidence in respect of the 'accounting' associations (ICA/SCCA) is, taken as a whole, prima facie supportive of the hypothesis. Overall, the evidence for the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR) is also broadly supportive of the hypothesis.

### Conclusion

The hypothesis is generally supported. Overall the encouragement of a flow of volunteers appeared perceived by status seeking association governing organ members as an issue of relatively greater urgency and relatively more critical to the future survival of their association. In the case of the status seeking associations, it is possible that fewer volunteers come forward without prompting from the association concerned as participation in the affairs of these associations offers little of benefit in career terms.

The responses given under Question 20 of the individual questionnaire (Appendix VII) on the importance of 'encouragement of member involvement in association affairs' provide a simple measure of direct relevance to this hypothesis. The 'average importance' (see Table 11.4) given by the Council members of the six associations in respect of which individual questionnaires were returned allows one to rank these association Councils in a continuum (see Table 3.2) from the association Council most, to that least, concerned with seeking to encourage the involvement of members in association affairs: LSCA/IPR, BBGS, SCCA/ICSA, BGA.

The positions of the associations on the continuum that results from the single and simple measure is 'indeterminate' in that they are not consistent either with categorisation of associations as 'business graduate', 'accounting' or 'management' associations, or by status as 'status seeking' or 'status maintaining' associations.

#### 11.4 MEMBERSHIP DEVELOPMENT

- (xxiii) Councils that perceive their associations as being relatively low in status are more concerned with quantity of membership and recruitment of new member issues.

##### Introduction

The hypothesis was tested by minutes, participant observation and questionnaire. Evidence consistent with the hypothesis would be of a high degree of concern with membership development on the part of Councils of status seeking associations and a relatively low level of concern with membership development in the case of Councils of status maintaining associations (Table 3.2).

It was felt that participant observation evidence should be more comprehensive than a relatively crude comparison of the number of occasions on which membership development issues arose. An assessment was attempted of the degree of concern expressed in the course of discussion of such issues. Some effort was devoted, in coming to an overall assessment, to taking account of the extent to which there appeared to be an explicit trade off between quality and quantity of membership. For example, a willingness to lower standards in order to attract a greater number of new entrants could be viewed as evidence of a greater concern with quantity of membership, as compared with another association which was apparently otherwise equally committed to maintaining standards but was unwilling to lower them in order to boost membership.

##### BGA / BBGS

The minutes evidence examined revealed that both the BGA and BBGS Councils were concerned with the recruitment of new members. The evidence examined did not suggest the BBGS was more concerned.



The participant observation evidence suggested that both the BGA and BBGS Councils were, by the standards of the total population of associations examined, relatively preoccupied with issues relating to the recruitment of new members. The BGA Council was marginally more concerned with preventing the 'dilution' of membership through the addition of marginal schools to the BGA list of approved schools and maintaining the quality of membership, and not trading off quality in order to obtain quantity.

The relevant questionnaire evidence was the response to a question on the importance of 'recruiting new members' (Q20). When asked to rank the importance of a range of activities of their professional association, the rankings given by both the BGA and BBGS Councils confirm the importance attached to recruiting new members (Table 11.5).

#### ICA / SCCA

A review of minutes revealed that the SCCA circulated membership recruitment figures with agenda papers at all Council meetings and membership recruitment issues appeared more frequently on the agenda of Council meetings than was the case with the ICA.

Participant observation evidence also supported the hypothesis. SCCA Council formal and informal discussion focused upon new member recruitment as a quantity issue, whereas such LSCA discussion as occurred tended to be preoccupied with the standards of aspiring new entrants. There was some informal LSCA discussion on the perceived 'problem' of over-recruitment.

Questionnaire replies to the question on recruiting new members (Q20) tended to support the hypothesis (Table 11.5). Two thirds of SCCA respondents ranked as 'extremely important' and one third as 'very important' the recruitment of new members. In comparison, while about a third of LSCA respondents also ranked the recruitment of new members as 'very important', only 5% or one in twenty ranked this activity as 'extremely important'.

**TABLE 11.5****Importance Given by Individual Questionnaire Respondents to the Recruitment of New Members**

	<u>Extremely</u> <u>Imp</u>	<u>Very</u> <u>Imp</u>	<u>Fairly</u> <u>Imp</u>	<u>Little</u> <u>Imp</u>	<u>Not</u> <u>Imp</u>	<u>Average</u> <u>Importance</u>
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**Professional Association Activities, Recruiting New Members (Q20)****(a) Number of Respondents**

BGA	3	2	3	1	-	3.8
BBGS	2	1	-	1	-	4.0
LSCA	1	7	8	5	1	3.1
SCCA	4	2	-	-	-	4.7
ICSA	1	1	-	-	-	4.5
IPR	4	7	6	-	-	3.9

**(b) Percentage of Respondents**

BGA	33	22	33	12	-
BBGS	50	25	-	25	-
LSCA	5	32	36	22	5
SCCA	67	33	-	-	-
ICSA	50	50	-	-	-
IPR	35	30	35	-	-

### IoD, BIM and ICSA / IM, CAM and IPR

An examination of minutes revealed a general and widespread concern of all the associations in this group with the recruitment of new members.

Participant observation evidence in the form of formal and informal Council/Committee discussion did not conclusively support or refute the hypothesis. The preoccupation of Councils and Committees with new member recruitment appeared to vary in strength from time to time. One's assessment would be that the IM, CAM and IPR group was more concerned.

The questionnaire replies on 'recruiting new members' (Q20) were not sufficient to conclusively support or refute the hypothesis (Table 11.5) in the case of the 'management' associations.

### Summary

The evidence in respect of the BGA and BBGS did not support the hypothesis. In contrast, the evidence collected for the 'accounting' associations (ICA/SCCA) supported the hypothesis. In the case of the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR), the evidence did not support or refute the hypothesis.

### Conclusion

The hypothesis was not supported in the case of the BGS/BBGS pair, but was supported in the case of the LCSA/SCCA pair in the sense that the evidence is consistent with it. This finding could reflect the reality that, unlike the ICA, the SCCA could not take a continuing flow of individuals wishing to register as students for granted. While the flow of students to the ICA increased through the period of study, the reverse was the case with the SCCA.

The 'average importance' given by respondees to the question (under Q20) in the individual questionnaire (Appendix VII) provides a single and simple measure of the importance placed upon the recruitment of new members. Using the responses obtained from the members of the Councils of six associations (Table 11.5), one is able to draw up a continuum (see Table 3.2), ranking the Councils of these associations from the one placing the highest importance upon, to the one giving the lowest importance to, 'membership development': SCCA, ICSA, BBGS, IPR, BGA, LSCA.

While the continuum is supportive of the hypothesis in respect of the 'accounting' associations, taking the group of 'ranked' associations as a whole, their positions on the continuum are not entirely consistent either with categorisation on the basis of status (ie 'status seeking' or 'status maintaining') or on the basis of 'field of operation' (ie 'business graduate', 'accounting' or 'management').

## 11.5 VIP MEMBER IDENTIFICATION

- (xxiv) Councils that perceive their associations as being relatively low in status are more concerned with the identification of VIP members within membership lists.

### Introduction

The hypothesis was tested by interview and by participant observation and minutes. Evidence consistent with the hypothesis would be of a high level of concern with the identification of VIP members within membership lists in the case of Councils of status seeking associations and a low level of concern with such identification on the part of Councils of status maintaining associations (Table 3.2).

In order to evaluate degree of concern, an assessment was made during participant observation of the intensity of desire for, and effort actually expended on, the question of identification of VIP members within membership lists. Assessment encompassed more than just a comparison of the occasions on which VIP members had been, or were to be, identified. It included the reasons for, or purpose of, such identification, and what, if any, action resulted.

### BGA / BBGS

In the interviews, neither the BGA nor the BBGS Committee members appeared particularly concerned with the identification of VIP members. In the words of one BBGS interviewee: "We want volunteers, 'full stop'". BGA interviewees did express the view that the Advisory Council of the BGA should be composed of 'captains of industry'.

One reason which emerged during interviewing why members of the BBGS Committee were not particularly concerned with the identification of VIP members, was an assumption on their part that the membership of the BBGS was not likely to include very many VIPs. "What VIPs?" was a BBGS response. BBGS interviewees tended to assume that membership of their Society was largely composed of younger business graduates at the start of their career.

In assembling the members of their equivalent of the BGA's Advisory Council, the BBGS looked at first almost exclusively outside of its membership for suitable candidates.

The participant observation and minutes evidence suggested that identification of particular VIP members was not an issue for either the BGA or the BBGS Council. The preoccupation of BBGS interviewees tended to be with identification of anyone within the membership who could 'lend a hand' rather than with VIPs per se.

Among BGA interviewees, more questions were raised about what one meant by the term 'VIP'. The BGA interviewee tended to express the view that a significant proportion of BGA members would in time 'do well'. It was suggested it was somewhat 'invidious' to pick out a subset of total membership on the grounds of VIP status (defined in terms of job descriptions) as those with the more important jobs would not necessarily be more capable as individuals, but would more likely be older.

#### ICA / SCCA

The interview evidence supported the hypothesis. The SCCA was more concerned than the ICA in identifying VIP members within the membership, its Secretary General in particular spending some time on this activity. Two SCCA interviewees had themselves 'combed through' membership lists looking for VIP members.

ICA interviewees tended to suggest that a substantial proportion of their members were VIPs by the standards of the population at large. Accordingly, it was suggested that it would be difficult to justify one senior partner, chief executive or financial director as being of higher VIP status than another. One ICA interviewee raised a 'practical' issue: "One group that is not so well represented is the senior partner of the 'big ten firm'. I suspect they don't stand for election for fear of being publicly rejected by an electorate composed predominantly of those from smaller firms".



The 'participant observation' and 'minutes' categories of evidence supported the hypothesis. In formal and informal discussion, ICA members were observed to express satisfaction with the involvement in, and identification with, the profession on the part of their more prominent members. In the case of the SCCA, there was some discussion of the extent to which certain of the SCCA members who were felt to have VIP status would wish to become involved with the Society. It was observed that prominent members of the SCCA were (as compared with their ICA counterparts) less inclined to refer to their professional designation and more likely to refer to themselves as 'accountants' or 'qualified accountants'. In contrast, ICA members tended to refer to themselves as 'chartered accountants' and not as 'accountants' or 'qualified accountants'.

Up until 1974, the SCCA sought VIPs from outside its membership for the position of President. In 1952, Sir Patrick Hannon was elected President of the Society of Commercial Accountants, followed in 1958 by Sir William Robson Brown, and from 1970-74, J Peter Ford, while during this period the Vice-Presidents included Sir Edwin Leather, Vice-Admiral J Hughes-Hallett MP and Robert Mellish MP.<sup>(1)</sup>

#### IoD, BIM and ICSA / IM, CAM and IPR

In general, interviews revealed that the associations in this group were interested to learn of VIP members within the membership without necessarily actively seeking to identify them. The interviewer became particularly aware, in the case of the management associations, of the understanding of, and awareness of, the many claims upon the time of those to whom they ascribed VIP status, on the part of interviewees. It appeared to be generally assumed that a really top flight businessman or woman would not have the time to become heavily committed to the affairs of a professional association.

IoD and ICSA interviewees expressed the view that the 'time and ability to contribute' was as important as VIP status per se. ICSA interviewees seemed to agree that factors such as 'technical competence', 'professional standing' and 'professionalism' were perhaps more important in aspirants to Council than an 'impressive job title'. One BIM interviewee expressed the view that: "One of the problems we have in getting good, representative, ordinary members to stand for BIM Council is that they think Council is made up of Captains of Industry and they are afraid they will not fit in".

Interviewees of all three of the 'management' associations categorised as status seeking (IM, CAM and IPR) expressed support for the practice of positively 'going out to get senior people involved'. Interviewees from these associations appeared marginally more concerned, in comparison with the IoD and ICSA, with 'seniority' and 'job title', and less concerned with 'technical competence' or 'professionalism' per se in their view of what constitutes 'VIP status'.

There was some participant observation and minutes evidence to support the hypothesis. The IPR in particular was concerned with ensuring that senior practitioners joined the Institute. An objective of the IPR 1984 presidency was to "seek to involve influential members in the work of the Institute".<sup>(2)</sup>

### Summary

In the case of the BGA and BBGS, the evidence did not support or refute the hypothesis. However, the evidence in respect of the 'accounting' associations (ICA/SCCA) supports the hypothesis. The evidence collected for the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR) did not conclusively support the hypothesis.

### Conclusion

The hypothesis was supported in the case of the ICA and SCCA matched pair of associations. To some extent, the ICA could take it for granted that a certain number of VIP members would come forward and participate in and contribute to association activities. In the case of the SCCA, those VIP members that were identified appeared reluctant to involve themselves in Society affairs.

Taking the group of association Councils studied as a whole, a simple quantitative 'measure' of their concern with the identification of VIP members within membership lists was not available. In order to draw up a continuum (see Table 3.2) of association Councils from the Council exhibiting the highest concern, to the Council showing the lowest concern, with this activity, the author relied upon qualitative and subjective assessment of the available interview and participant observation evidence. The resulting 'VIP member identification' continuum is as follows: SCCA, IPR, IM, CAM, BIM, BGA/BBGS, IoD, ICSA, ICA.

It would appear that, for the group of six association Councils as a whole, their position on the continuum is broadly consistent with their status categorisation as 'status seeking' or 'status maintaining' associations.

## 11.6 EXPLICIT ACKNOWLEDGEMENT OF MEMBERSHIP

- (xxv) Councils that perceive their associations as being relatively low in status are more concerned with the extent to which members make explicit and acknowledge their memberships (ie appear publicly to use and quote their qualifications in the case of a qualifying association).

### Introduction

The hypothesis was tested by questionnaire and by participant observation and interview. Evidence consistent with the hypothesis would be of explicit acknowledgement of membership being sought by Councils of status seeking associations and not sought by Councils of status maintaining associations (Table 3.2).

During the process of participant observation, an attempt was made not merely to compare the frequency with which Council members publicly acknowledged their qualifications, but to assess the relative importance and significance of these acknowledgements and, more importantly, the degree of concern that was expressed on the issue. One needed, for example, to distinguish between periodic, almost routine, 'reminders' regarding the use of designatory letters from 'real' or 'positive' pressure for the more widespread acknowledgement of membership and public commitment to, or association with the professional organisation in question.

### BGA / BBGS

The questionnaire evidence took the form of responses to questions on the 'importance of use of professional designation/letters' (Q18), 'encouragement of use of professional designations' (Q20) and 'use of professional designation' (Q31). This evidence (Summary Table 11.6-7, Tables 11.6, 11.7 in Appendix XXXI and Table 11.8) was not sufficient to conclusively support or refute the hypothesis. The higher importance given by BBGS, as compared with BGA, respondents to the use of 'professional designation and letters' could reflect the fact that the BBGS had designatory letters (MBBGS for members and FBBGS for a very limited number of fellows), while the BGA did not.

The participant observation and interview evidence did not support the hypothesis. Given that the BGA did not have a set of designatory letters, the question of the use of such letters was not an issue so far as the BGA was concerned. The BBGS Committee did not appear particularly concerned with the use of the BBGS designatory letters. In the view of one BBGS interviewee: "No one in the UK would join us for the letters, or use the letters, as no one else would know what they meant. The letters probably do attract some overseas students who use them".

### ICA / SCCA

The questionnaire evidence in the form of responses to questions on the 'importance of use of professional designation/letters' (Q18), 'encouragement of use of professional designations' (Q20) and 'use of professional designation' (Q31), presented in Summary Table 11.6-7, Tables 11.6, 11.7 in Appendix XXXI and Table 11.8, did not support or refute the hypothesis. Respondents from both bodies displayed a similar attitude towards the use of designatory letters.

SUMMARY TABLE 11.6-7Importance Given by Individual Questionnaire Respondents to Explicit Acknowledgement of Membership(a) Importance Given by Individual Questionnaire Respondents to the Use of Professional Designation and Letters (Q18)

<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
2.3	3.5	3.5	3.0	4.0	3.1

(b) Importance Given by Individual Questionnaire Respondents to the Encouragement of Members of Their Professional Associations to Use Their Professional Designations and Letters (Q20)

<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
2.2	2.2	2.5	3.5	3.5	2.9



TABLE 11.8

Use by Individual Questionnaire Respondents of Their Professional Designation (Q31)

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
<u>(a) Number of Respondents</u>						
Letterheads/Calling Cards	4	3	16	5	2	9
By-lines	4	2	14	2	2	8
Potted Biographies	7	-	15	2	2	15
Internal Staff Lists	-	-	3	2	1	3
Published Lists	1	1	14	2	2	12
Professional Correspondence	3	2	14	4	2	10
<b>Note: Number of Respondents</b>	<b>9</b>	<b>4</b>	<b>22</b>	<b>6</b>	<b>2</b>	<b>17</b>
<u>(b) Percentage of Respondents</u>						
Letterheads/Calling Cards	44	75	73	83	100	53
By-lines	44	50	64	33	100	47
Potted Biographies	78	-	68	33	100	88
Internal Staff Lists	-	-	14	33	50	18
Published Lists	11	25	64	33	100	70
Professional Correspondence	33	50	64	67	100	59

The participant observation and interview evidence was supportive of the hypothesis. In formal and informal discussion, members of the SCCA Council appeared more concerned than members of the LSCA Committee with encouraging members to make explicit and acknowledge their membership. One SCCA interviewee was particularly firm on the question of 'explicit acknowledgement of membership': "Anyone who is ashamed of membership of the Society should not be on Council, and should be asked to leave". ICA interviewees were more diffident (eg, "My clients know, isn't that enough?", "People don't use letters much these days, I think I'm an FCA on the notepaper").

The Executive Director of the SCCA wrote to the author<sup>(3)</sup> in 1979 drawing attention to the non-use of the designatory letters FSCA after the author's name in 'Professional Administration'. In 1981, the SCCA President wrote to all members of council urging them to use their designatory letters after their names on 'business literature'<sup>(4)</sup>

#### IoD, BIM and ICSA / IM, CAM and IPR

The questionnaire evidence drawn from responses to questions on the 'importance of use of professional designation/letters' (Q18), 'encouragement of use of professional designations' (Q20) and 'use of professional designation' (Q31) (see Summary Table 11.6-7, Tables 11.6, 11.7 in Appendix XXXI and Table 11.8), was not sufficient to support or refute the hypothesis. The actual use by IPR respondents of their designatory letters (Table 11.8) appears higher than that suggested by the importance they have placed upon their use in response to other questions (Summary Table 11.6-7 and Tables 11.6 and 11.7 in Appendix XXXI).

The participant observation and interview evidence offered some support for the hypothesis. The CAM Committee and, to a lesser extent, the IPR Council was more concerned that members made explicit and acknowledged their memberships than the IoD Council and BIM for whom the matter did not appear to be a significant issue. One IoD interviewee took the view: "Most employers and headhunters would be suspicious of someone who put down FInstD on their application form, or gave it on a 'CV' as a qualification. It's not really encouraged".

### Summary

The hypothesis was not strictly relevant to the BGA/BBGS pair of associations. In the case of the 'accounting' associations (ICA/SCCA), the evidence revealed some support for the hypothesis. The evidence also revealed some support for the hypothesis in respect of the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR).

### Conclusion

While there was some support for the hypothesis in the context of comparing certain bodies with certain other bodies, it could not be said to be proved in respect of the comparison in general of status seeking and status maintaining bodies.

It is possible that explicit acknowledgement of membership is less of an issue for a relatively large and well funded association as the ICA with a relatively high public profile. The incremental contribution of individual Council members through, for example, use of their designatory letters is likely, in this context, to be small.

Individual questionnaires (Appendix VII) were returned by members of the Councils of six associations. These questionnaires contained three questions of relevance to this hypothesis: the importance given to the use of a professional designation and letters (Q18); the importance given to the encouragement of members to use their professional designations and letters (Q20); and the use of a professional designation (Q31). In order to rank the associations in respect of which individual questionnaires had been returned in a continuum (see Table 3.2), the 'overall average' of the average responses to the two questions concerning 'degrees of importance' (Q18 and Q20) was selected (Summary Table 11.6-7) as a 'measure'. It was thought that the respondents' own use of their professional designation (Table 11.8) need not be representative of the strength of their feeling regarding the use by association memberships as a whole of their professional designations.

The resulting continuum of Council concern with 'explicit acknowledgement of membership' (from greatest to least concern) on the basis of the simple (but albeit crude) 'overall average' is as follows: ICSA (3.75), SCCA (3.25), LSCA/IPR (3), BBGS (2.85), BGA (2.25). Even allowing for the fact that the BGA does not offer its members a professional designation, position on the continuum does not appear to be consistent with either status categorisation as 'status seeking' or 'status maintaining', or as a 'business graduate', 'accounting' or 'management' association.

## 11.7 CODE OF PRACTICE AND DISCIPLINARY MATTERS

(xxvii) Councils that perceive their associations as being relatively low in status are less concerned with codes of practice issues and disciplinary matters.

### Introduction

The hypothesis was tested by minutes and publications, questionnaire and interview. A selection of the documentary evidence relating to this hypothesis is presented in Appendix XXVIII. Evidence consistent with the hypothesis would be of lower concern with code of practice and disciplinary matters in the case of Councils of status seeking associations and comparatively higher concern with such matters on the part of Councils of status maintaining associations (Table 3.2).

### BGA / BBGS

The minutes and publications evidence is not sufficient to conclusively support or refute the hypothesis. Neither the BGA nor the BBGS had a functioning disciplinary procedure. Membership of both associations was based upon possession of an academic qualification and, for continuing membership, there were no tests of competence or any obligation to remain up to date. There was no documentary evidence to suggest that code of practice and disciplinary matters were perceived by either the BGA or the BBGS Committees as of any significance.

The questionnaire evidence drawn from 'views on professional issues (Q18) (see Summary Table 11.9-11 and Table 11.9 in Appendix XXXI) lends some but not conclusive support to the hypothesis. The evidence drawn from responses to the question on the importance of 'professional association activities' (Q20) (see Summary Table 11.12-14 and Table 11.12 in Appendix XXXI), however, favours the hypothesis. A 'higher' importance on activities relevant to this hypothesis is apparent in the case of the BGA (as compared with the BBGS) responses.

SUMMARY TABLE 11.9-11Importance Given by Individual Questionnaire Respondents to Standards and Codes of Practice Issues (Q18)

	<u>BCA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
Self-Regulation	3.3	3.0	3.9	3.8	4.5	3.8
Development of Standards of Practice	3.8	3.7	3.9	3.5	4.5	4.2
Adherence to Professional Standards	4.1	4.0	4.5	4.0	4.5	4.3
A Sense of Professional Responsibility/Ethical Standards	4.0	4.0	4.5	4.3	5.0	4.2
Adherence to Code of Practice	3.4	4.0	4.0	4.2	5.0	4.3
Overall Average Importance	3.7	3.7	4.2	4.0	4.7	4.2

SUMMARY TABLE 11.12-14Importance Given by Individual Questionnaire Respondents to Standards, Codes of Practice and Disciplinary Activities of Their Professional Association (Q20)

	<u>BGA</u>	<u>BBGS</u>	<u>LSCA</u>	<u>SCCA</u>	<u>ICSA</u>	<u>IPR</u>
Maintaining Standards of Entry	4.1	3.5	4.2	4.3	5.0	3.9
Raising Standards of Entry	3.1	2.2	3.5	4.0	4.5	3.7
Provision of a Licence to Practice	2.8	1.2	3.9	3.7	3.5	2.4
Maintenance of Standards	4.0	3.2	4.3	4.0	5.0	4.5
Disciplinary Procedure/ Code of Practice	2.8	2.2	4.1	3.7	4.5	3.9
Overall Average Importance	3.7	2.5	4.0	3.9	4.5	3.7



The interview evidence was not sufficient to support or refute the hypothesis. Code of practice issues and disciplinary matters were not significant for members of the committees of the BGA and BBGS. Two BGA interviewees pointed out: "We don't have a code of practice or a disciplinary machinery". BBGS interviewees had limited awareness of, and showed little interest in, their association's 'principles' of good conduct. Little interest was shown in these topics which were not perceived as relevant to the degree that was the case for the members of the governing bodies of other associations studied.

Neither the BGA nor BBGS had Committees or Sub-Committees concerned with code of practice issues or disciplinary matters. Neither association operated a code of practice per se (although the BBGS published a list of 'principles'). The BBGS alone of the two associations articulated and communicated to its members a set of principles or standards of behaviour or conduct. Membership of both associations was based upon possession of a recognised business studies degree awarded by another organisation and not by the association itself. Such concern as was expressed by BGA interviewees about standards tended to concern questions of whether or not the association should continue to recognise, as a qualification for membership, the degrees awarded by certain schools, rather than continued membership of individual business graduates.

#### ICA / SCCA

From the 'minutes and publications' category of evidence (see Appendix XXVIII), while the relevant procedures of the ICA are relatively more formal and developed than those of the SCCA, one could not conclude that the SCCA Council was in any sense less concerned with codes of practice issues and disciplinary matters than that of the ICA.

The ICA, in addition to operating a disciplinary procedure offered an ethical advisory service to its 'industrial' members. The ICA also had lay members upon its Investigation Committee, Disciplinary Committee and Appeal Committee and operated a Joint Disciplinary Scheme with the ACA. The SCCA did not offer its members an advisory service and operated alone, with a much more simple procedure.

Taking into account its much larger membership, the ICA procedure appeared, on a proportional basis, to examine four to five times as many cases as the SCCA procedure. A 'Code of Conduct' was drawn up and circulated to SCCA practising members during the period of the study.

The questionnaire evidence in the form of responses to questions relating to 'views on professional issues' (Q18), set out in Summary Table 11.9-11 and Table 11.10 in Appendix XXXI, does not support the hypothesis. Both SCCA and LSCA respondents put a high importance upon issues relating to Code of Practice and disciplinary matters. The evidence relating to 'professional association activities' (Q20), set out in Summary Table 11.12-14 and Table 11.13 in Appendix XXXI, throws some doubt on the validity of the hypothesis. Again, the SCCA and LSCA respondents have given a similar pattern of responses.

The interview category of evidence threw considerable doubt upon the validity of the hypothesis. During the later part of the period of study, the SCCA Council became relatively more interested in code of practice and disciplinary matters. One of the reasons for this was the absorption into membership in 1981 of the British Association of Accountants and Auditors (BAA) which more than doubled the number of SCCA members in public practice.

During the course of interviews, it emerged that ICA interviewees tended to assume that ICA members observed Statements of Standard Accounting Practice and other standards, and that disciplinary procedures operated (eg "We take it for granted the procedures operate - and so they should"). To some extent, activity relevant and appropriate to the operation of a code of practice and disciplinary procedures was taken for granted. In the case of SCCA interviewees, this was not the case. The absorption, post- 1981, of BAA members in public practice and the issuing of practising certificates resulted in an increased awareness of and concern with code of practice and disciplinary matters on the part of SCCA Council members.

IoD, BIM and ICSA / IM, CAM and IPR

The minutes and publications evidence throws some doubt upon the hypothesis. In particular, the IPR emerges as relatively more concerned with codes of practice issues and disciplinary matters in comparison with other issues than perhaps any association studied (see Appendix XXVIII).

The IoD periodically issued its 'Guidelines for Directors' covering the duties and responsibilities of company directors to all of its members. CAM similarly in 1983 circulated all its members with a guide to good practice. The BIM, ICSA and IPR all reviewed and updated codes of conduct during the period of the study. The IPR linked its Code of Conduct review with positioning the association for an application for a Royal Charter. From April 1984, ICSA (alone among the management associations studied) introduced a system of practising certificates for its members engaged in public practice in the UK.

In the case of the questionnaire evidence drawn from responses to questions on 'view on professional issues' (Q18) and 'professional association activities' (Q20), while the overall pattern of responses is similar for the IPR and ICSA, the evidence (Summary Tables 11.9-11 and 11.12-14 and Tables 11.11 and 11.14 in Appendix XXXI) is not sufficient to prove or disprove the hypothesis.

The interview evidence threw some doubt on the validity of the hypothesis. In particular, members of the IPR interviewed exhibited a relatively high level of interest in code of practice and disciplinary matters (eg "It's vital", "We must be seen to police our members").

IoD interviewees were concerned that IoD members "be made fully aware of their duties and responsibilities as directors". It was evident that the IoD believed that, because such duties and responsibilities had legal force, the primary constraint upon directors was the threat of legal liabilities and shareholder action rather than any disciplinary initiative on the part of the IoD. In cases of negligence and misconduct, the IoD appeared to monitor and follow on from, or react to, the decisions of the Courts, rather than initiate its own action. One IoD interviewee observed: "Why is it in investigations and city scandals they always mention that the crooks are members of the Institute of Directors?".

BIM and IM interviewees were concerned with increasing standards of managerial competence and levels of managerial performance rather than with standards of professional conduct per se. ICSA interviewees recognised the diverse nature and international geographic spread of their membership as a source of difficulty in drawing up and operating common standards and a worldwide disciplinary framework. The least concern with code of practice and disciplinary matters was shown in CAM interviews.

### Summary

Overall, the evidence in respect of the BGA and BBGS was not sufficient to conclusively support or refute the hypothesis. In the case of the 'accounting' associations (ICA/SCCA) the evidence, overall, threw doubt upon the validity of the hypothesis. Overall, the evidence for the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR) threw significant doubt upon the validity of the hypothesis.

### Conclusion

Overall, the validity of the hypothesis must be seriously questioned. It is possible that concern with code of practice and disciplinary matters is such a 'core' 'trait' of the professional association as to make it difficult to identify differences of degrees of concern between associations.

Customers are perceived as being increasingly willing to judge the relevance of professional services to their needs and the relative quality of different groups of professionals and other occupational groups. As a consequence, there may in future be less external reliance upon a profession's own code of practice and disciplinary procedure as a quality control mechanism.

Participant observation evidence revealed some awareness among Council members of a number of associations concerning the cost and difficulty of initiating and progressing investigatory and disciplinary action against members. There was some speculation as to whether in future, in view of these difficulties, changing expectations regarding 'expert knowledge', and the emergence of specialisms, codes of ethics, conduct and practice might need to be more 'general' or 'broad'.

The individual questionnaire (Appendix VII) contains a question concerning the degree of importance placed upon 'adherence' to a Code of Practice (under Q18), and a question concerning the importance placed upon a 'Disciplinary Procedure/Code of Practice' (under Q20). Individual questionnaires were returned by the members of Councils of six associations and the 'average importance' placed by respondents from each association to these two questions is given in Summary Tables 11.9-11 and 11.12-14 respectively. Taking an 'overall average' of the 'average importance' responses to these two questions, one has a simple 'measure' of degree of importance placed upon 'code of practice and disciplinary matters'.

Using this simple 'measure', one can develop a continuum (see Table 3.2) of the association Councils from the Council placing the lowest, to the Council putting the highest, importance upon 'Code of Practice and disciplinary matters': BGA/BBGS (3.1), SCCA (3.95), LSCA (4.05), IPR (4.1), ICSA (4.75). Position on the continuum is not consistent with the categorisation of these associations by status ('status seeking' or 'status maintaining') but is consistent with categorisation by 'field of operation' ('business graduate', 'accounting' or 'management').

## 11.8 TWO-WAY COMMUNICATION WITH MEMBERS

(xxx) Councils that perceive their associations as being relatively low in status are less likely to exhibit concern regarding active two-way communication with members.

### Introduction

The hypothesis was tested by participant observation and interview. Certain evidence from publications and minutes was also found to be relevant to this hypothesis. A selection of this is presented in Appendix XXIX. Evidence consistent with the hypothesis would be of less concern about two-way communication with members in the case of Councils of status seeking associations, and more concern about such communication on the part of Councils of status maintaining associations (Table 3.2).

In the process of participant observation, in order to assess degree of concern, some evaluation was attempted of the importance attached to, and commitment shown towards, active two-way communication with members. The participant observer also attempted an assessment, which was inevitably subjective, of the extent to which any two-way communication activities discussed could be said to be 'active'. More 'active' communication was taken as evidence of a higher level of 'concern'.

### BGA / BBGS

The participant observation and interview evidence did not support the hypothesis in that both BGA and BBGS Committee members appeared to display an equal degree of concern regarding active two-way communication with members. In the case of both the BGA and the BBGS, an underlying reason for the concern shown appeared to be the desire to involve members in association affairs. BGA interviewees tended to stress the need for BGA activities to meet the needs of their members, hence a requirement for member feedback. BBGS interviewees in comparison appeared to be more concerned with identifying members who could contribute to the running of the association.

BGA interviewees tended to focus on the 'principle' of two-way communication and to agree that it was both important and represented 'best practice' (eg "No MBA of all people, is going to say it's not important"). BBGS interviewees tended, in comparison, to be more 'pragmatic'. One BBGS interviewee observed: "We've got to give them something to show for their money".

The publications and minutes evidence was not conclusive. Both the BGA and BBGS were conscious of the importance of two-way communication with members. The BGA, however, was more energetic in terms of taking action to elicit members' views by survey and questionnaire.

### ICA / SCCA

The participant observation and interview evidence was broadly supportive of the hypothesis. ICA interviewees favoured a greater use of questionnaires and surveys to elicit members' views. One ICA interviewee observed: "Debates about governance of the Institute are really about different mechanisms for communicating with sections of the membership. Our problems are largely those of barriers to involvement resulting from the size of our membership".

ICA interviewees also expressed concern that ICA activities and services met the needs of their members. In contrast, SCCA interviewees tended to interpret questions concerning two-way communication with members in terms of the interests of the Society. The Society would be seeking to identify those who could contribute specific expertise, while at the same time attempting not to 'stir up' the 'backwoodsmen' or 'troublemakers' who would contribute little while their letters and telephone calls would involve scarce and limited secretariat staff time in responding. Another consideration for SCCA interviewees was the cost of communicating with members (eg "It costs money and really has to be justified").



In the case of publications and minutes evidence, the ICA (compared with the SCCA) emerges as relatively more concerned with two-way communication with members and, in particular, member issue consultation, the review of mechanisms and channels of consultation, and the representation and involvement of the views and interests of the major categories of membership (see Appendix XXIX).

The ICA had and operated established channels and traditions of member consultation. Area (District) Societies (such as the LSCA) had a significant consultative role and there appeared to be a genuine desire to consult with members and seek their views on sensitive and important issues. Special surveys and investigatory working parties and reports were commissioned by the ICA on important issues and topics. In comparison, the SCCA rarely sought to elicit its members' views.

#### IoD, BIM and ICSA / IM, CAM and IPR

The participant observation and interview evidence did not support the hypothesis in that concern regarding active two-way communication with members did not appear to be related to the question of perceived association status, although the IM and CAM appeared relatively less concerned than the other associations in this group. IoD, BIM and ICSA interviewees all mentioned the size and diversity of the membership of their associations as reasons why it was important to establish effective channels of two-way communication.

The distinctions that emerged in the course of interviewing related more to the purpose of and motivation for two-way communication with members than the volume of such communication per se. The IoD, BIM and IM sought 'customers' for their education and training programmes and courses.

The IoD and BIM sought support for their representational activity, in the case of the IoD through involvement in discussion groups, and, in the case of the BIM, through responses to member questionnaires. ICSA sought greater member involvement in 'Panel' activities, and CAM and IPR greater member attendance at events.

At least one interviewee from each of the 'management' associations mentioned in interview discussion that certain members of the Council of their association represented a particular constituency (either geographic or vocational), and that these Council members had a responsibility to report back to their respective constituencies. Members of the BIM Council representing Branch Area Committees appeared particularly conscious of their role in the process of communication between the BIM Council and BIM members.

The publications and minutes evidence (see Appendix XXIX) is mixed. The IoD, BIM and IPR appear particularly concerned with two-way communication with members.

The IoD, BIM and ICSA can be distinguished from the IM, CAM and IPR in part by their representational activity. The relatively large scale of the IoD, BIM and (to a lesser extent) ICSA activity appears to have encouraged them to seek their member views (and in the case of ICSA to tap the specialist expertise of their members) in order to add weight and authority to their representations. Much of IoD and BIM member consultation activity would appear to be directly related to the representational activity of these associations.

The IM, CAM and IPR appeared to have less of a tradition of member consultation than was the case with the IoD and BIM. These associations were prepared to seek the views of their members on specific issues. The IPR appeared noticeably more concerned about two-way communication with its members in the period 1984-85 when it sought to determine the extent to which a consensus existed on the issue of the desirability of chartered status.

### Summary

The evidence in respect of the BGA and BBGS did not support the hypothesis, while the evidence collected for the 'accounting' associations (ICA/SCCA) supported the hypothesis. In the case of the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR), the evidence did not conclusively support or refute the hypothesis.

### Conclusion

The hypothesis would only appear to have validity, in the sense of consistency of evidence with it, in respect of the accounting group of associations studied. Compared with the ICA, the greater concern displayed by the SCCA with active two-way communication with members could be a reflection of a greater questioning on the part of SCCA members of the role of the Society, and the value of continuing membership of it.

In the case of the ICA, SCCA, ICSA and IPR, there was some recognition that members in public practice and non-practising members, or those employed in large commercial organisations, had distinct communication needs. In the case of the larger associations, an obstacle that was identified to two-way communication with members was the growing heterogeneity of membership and the emergence of specialisms each with its own communications requirements.

Taking the group of associations studied as a whole, the author based their ranking on a continuum (see Table 3.2) from the association Council least concerned, to the association Council most concerned, about 'active two-way communication with members' upon qualitative (and subjective) assessment of the participant observation and interview evidence. The resulting continuum of Council concern (less-more) is as follows: SCCA, IM, CAM, BBGS/BGA, IPR/LSCA, ICSA, BIM/loD.

Position on the resulting continuum appears to be consistent with categorisation as 'status seeking' or 'status maintaining' associations, and not to categorisation as a 'business graduate', 'accounting' or 'management' association. It should be borne in mind that in developing the continuum ranking a subjective element of the qualitative assessment was the placing of a higher value or 'importance' upon 'two-way communication' to elicit a 'point of view' (perhaps contributing to a 'representation') than upon 'two-way communication' for which the desired 'response' consisted of attendance at a social event.

## 11.9 PUBLICISING REPRESENTATION ACTIVITY

(xxx) Councils that perceive their associations as being relatively low in status are more likely to be concerned with giving publicity to the process of representation.

### Introduction

The hypothesis was tested by publications and minutes. A selection of relevant evidence is presented in Appendix XXX. The preliminary findings were tested by comparison with participant observation and interview findings. Evidence consistent with the hypothesis would be of more concern about publicising representation activity in the case of Councils of status seeking associations, and less concern about publicising such activity on the part of Councils of status maintaining associations (Table 3.2).

During the course of participant observation, an attempt was made to assess evidence concerning the giving of publicity to the process of representation in the context of the total volume of such representations and their importance. For example, in comparing degree of concern exhibited by different association Councils, one needed to be able to relate significant effort by one association in respect of a selection of representations to less intensive effort (per representation) of another association, but an effort that extended to all of its (or a higher proportion of its total) representations.

### BGA / BBGS

Overall, the publications and minutes evidence also does not support the hypothesis (see Appendix XXX). Giving publicity to the process of representation appears more related to the volume of representational activity undertaken.

The participant observation and interview evidence also did not support the hypothesis. The BGA Committee was particularly concerned to obtain the maximum publicity for both BGA representations and BGA research activity undertaken. The point was made in the course of BBGS interviews that the BBGS rarely made representations, and hence there was not an active process to which publicity could be given.

### ICA / SCCA

Overall, the publications and minutes evidence (see Appendix XXX) does not support the hypothesis. The SCCA during the period of study made relatively few representations and hence at times, even if the SCCA had wished to give publicity to the process of representation, there would have been little to publicise. The ICA did report its representational activity to its members, but in a summary and less dramatic form than the IoD and BIM.

The lack of publicised evidence in respect of the SCCA was a reflection of the relatively insignificant amount (in comparison with the ICA) of representational activity undertaken by the SCCA.

The participant observation and interview evidence suggested that the SCCA would have been relatively more concerned with giving publicity to the process of representation had it been able to engage in a greater amount of such activity, but the evidence is not sufficient to allow a judgement to be made as to whether such a level of concern would have been greater or less than that of the ICA in respect of a similar level of representational activity.

### IoD, BIM and ICSA / IM, CAM and IPR

Overall, the publications and minutes category of evidence (see Appendix XXX) did not support the hypothesis. With significantly greater resources (and larger memberships, hence a greater expertise pool to draw upon), the status maintaining associations emerge as making a much larger number of representations on a considerably wider range of issues than the status seeking associations, the representation activity of which emerges as very limited and ad hoc in comparison.

The IoD, BIM, ICSA, IM and IPR all appeared to report their representations to encourage member involvement in contributing to representations to secure support for the points made, and views put, in representations, and to encourage member retention and recruitment. The IoD and BIM sought, on occasion, to encourage their members to become directly involved in the representational process (for example, by questioning parliamentary candidates).

ICSA, in its reporting of representational activity appeared more concerned with professional updating and encouragement of technical input from members. The IM and IPR, of all the management associations, are, in their reporting, most likely to link their representations with recognition of, and the status of, the Institute. CAM did not, to any significant extent, engage in representational activity. Hence, there was little for CAM to report to its members.

The participant observation and interview evidence does not support the hypothesis. Representational activity was almost non-existent in the case of CAM, and intermittent in the case of the IPR. Of the associations making regular submissions, those of ICSA were largely technical in nature. Those of the IM tended to be concerned with establishing the importance of marketing. Both IoD and BIM submissions tended to be 'member centred' in that they concerned the conditions and prospects of members and their business environment. The publicity given to representations reflected these differing emphases.

In IoD and BIM interviews, it emerged that giving publicity to the process of representation was perceived as of considerable importance in retaining and attracting members. IoD and BIM interviewees believed their members wanted their association to speak out on their behalf, and they gave a very high priority to raising the profile of their organisation through their representational activity.

### Summary

The evidence collected for the BGA and BBGS does not support the hypothesis. That collected for the 'accounting' associations (ICA/SCCA) does not appear to support the hypothesis. Finally, the evidence in respect of the 'management' associations (IoD, BIM and ICSA/IM, CAM and IPR) does not support the hypothesis.

### Conclusion

The hypothesis is not supported. Publicising representational activity would appear to be a common concern across the full range of associations studied. During the course of the study, representational activity appeared to assume a growing importance among the range of activities considered by Councils to be proper and appropriate activities of their associations.

Taking the group of associations studied as a whole, the author based their ranking on a continuum (see Table 3.2), from the association Council most concerned, to the association Council least concerned, about 'giving publicity to the process of representation', upon qualitative (and subjective) assessment of the participant observation and interview evidence in addition to that derived from publications and minutes. The resulting continuum of Council concern (more-less) is as follows: IoD/BIM, ICA/ICSA, BGA, IM, IPR, SCCA, CAM, BBGS.

Apart from the position of the BGA, position on the continuum of Council concern with 'giving publicity to the process of representation' appears to relate to the volume of representational activity of the associations, and the resources they have available to undertake such activity. Position also appears, taking the group of associations studied as a whole, to be consistent with their status categorisation (in a way that does not support the hypothesis) as 'status seeking' or 'status maintaining' associations.



#### 11.10 CONCERNS OF COUNCILS OTHER THAN EXPLICITLY STATUS CONCERNS FINDINGS

The status concerns of professional association governing organs have been summarised in Section 9.9 of Chapter Nine. The purpose of this section is to summarise the non-status related concerns of professional association governing organ members. This summary is presented in Table 11.15. The trend and factors relating to the concept of the profession identified in Section 12.3 and the background trends and issues identified by professional association governing organ members and listed in Section 12.7 of Chapter Twelve will also be of varying concern to the governing organs of professional associations.

Of the eight hypotheses [(xix), (xx), (xxiii), (xxiv), (xxv), (xxvii), (xxx), (xxxi)] dealing with the concerns of association Councils other than explicitly status concerns, only one (xx) is supported, in the sense of consistency of evidence with it, in respect of all three groups of associations studied. Three hypotheses [(xxiii), (xxiv), (xxx)] however are supported for the accounting associations only while one further hypothesis (xxv) has some support in respect of both the accounting and the management associations.

- Hypothesis (xix) concerning Relevance of Expertise (Section 11.2) is not supported.
- Hypothesis (xx) concerning the Encouragement of Volunteers (Section 11.3) is generally supported in the sense of consistency of the evidence with it.
- Hypothesis (xxiii) concerning Membership Development (Section 11.4) is supported in the case of the accounting associations, but is not supported in the case of the associations the membership of which is composed of business graduates.
- Hypothesis (xxiv) concerning VIP Member Identification (Section 11.5): Only in the case of the accounting associations is the evidence consistent with it.

**TABLE 11.15**  
**Findings Relating to Hypotheses Dealing with the Concerns of Association Councils Other Than Explicitly Status Concerns**

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Section</u>	<u>Business Graduate Associations</u>	<u>Accounting Associations</u>	<u>Management Associations</u>	<u>Overall</u>
(xix)	Relevance of Expertise	11.2	Not supported	Not supported	Not supported	Not supported
(xx)	The Encouragement of Volunteers	11.3	Supported	Prima Facie support	Broadly supported	Supported (evidence consistent)
(xxiii)	Membership Development	11.4	Not supported	Supported	Not supported nor refuted	Evidence consistent for Accounting Associations only
(xxiv)	VIP Member Identification	11.5	Neither supported nor refuted	Supported	Not conclusively supported	Evidence consistent for Accounting Associations only
(xxv)	Explicit Acknowledgement of Membership	11.6	Not relevant	Some support	Some support	Some support where relevant
(xxvii)	Code of Practice and Disciplinary Matters	11.7	Evidence insufficient	Validity doubted	Validity doubted	Validity doubted
(xxx)	Two-way Communication with Members	11.8	Not supported	Supported	Neither supported nor refuted	Evidence consistent for Accounting Associations only
(xxxi)	Publicising Representation Activity	11.9	Not supported	Not supported	Not supported	Not supported

- Hypothesis (xxv) concerning Explicit Acknowledgement of Membership (Section 11.6) is not conclusively supported.
- Hypothesis (xxvii) concerning Code of Practice and Disciplinary Matters (Section 11.7) is of doubtful validity.
- Hypothesis (xxx) concerning Two-way Communication with Members (Section 11.8): Only in the case of the accounting associations does the evidence appear to be consistent with it.
- Hypothesis (xxxi) concerning Publicising Representation Activity (Section 11.9) is not supported.

In total, evidence relating to eight hypotheses is presented in this chapter. In the case of hypothesis (xxiv) concerning VIP member identification, hypothesis (xxx) concerning two-way communication with members, and hypothesis (xxxi) concerning publicising representation activity, position on the continua developed for these hypotheses (taking the associations concerned as a whole) appears consistent with status categorisation as a 'status seeking' or 'status maintaining' association. The continuum in respect of hypothesis (xxvii) concerning code of practice and disciplinary matters appears consistent with categorisation as a 'business graduate', 'accounting' or 'management' association. Of the remaining four hypotheses, position on the continuum developed for hypothesis (xix) concerning relevance of expertise is consistent with both forms of categorisation, while positions on the continua for hypothesis (xx) concerning the encouragement of volunteers, hypothesis (xxiii) concerning membership development, and hypothesis (xxv) concerning explicit acknowledgement of membership is not consistent ('indeterminate') with either form of categorisation.

Chapter Twelve, the next chapter, elaborates these findings and relates them to a discussion of the present conceptualisation of professionalism, while Chapter Thirteen considers their implications for the Policies and Practices of Occupational Associations.

**PART IV**

**DISCUSSION AND CONCLUSIONS**

CHAPTER TWELVE  
PRESENT CONCEPTUALISATION OF THE  
PROFESSIONS AND PROFESSIONALISM

12.1 INTRODUCTION

The study is concerned with both the theoretical understanding of, and the management of, professional associations. This chapter (which is primarily theoretical and conceptual) summarises the overall findings of the study and discusses these findings in the context of the present conceptualisation of professionalism. The relevance and contribution of the findings to the theory of professions, professionalism and professionalisation is considered in Sections 12.3-4, 12.5 and 12.6 of this chapter respectively.

The central distinction in the study is one of status categorisation of associations as status seeking or status maintaining. Section 12.9 of this chapter re-examines this central distinction in the light of its empirical validity as assessed through its operationalisation via thirty-four separate hypotheses and relevant 'indicators'. In the presentation of the findings relating to each hypothesis in Chapter Seven to Eleven of Part II, an attempt was made, by means of simple 'indicators', to assess the extent to which these findings were consistent with the status seeking/status maintaining distinction. In the light of the findings of the study, Section 12.9 also explores alternative approaches to the categorisation of professional associations.

The implications of the study for the strategic policies and related operational procedures of each of the three groups of associations studied are set out in Chapter Thirteen. The implications for the management of occupational associations are considered in Chapter Fourteen.

An attempt is also made to identify trends and suggest issues for further enquiry. The trends and factors identified and listed are particularly those that, in the opinion of the author, will need to be considered and addressed by the governing organs of professional associations.

The present conceptualisation of professionalism is limited in so far as management associations are concerned and has yet to be developed in respect of associations, the membership of which is composed of business graduates. Hence the point of departure in this chapter is those aspects of the present conceptualisation of professionalism summarised in Chapter Two that have been formulated as hypotheses, and the author's previous and preliminary investigation of the associations selected for study.<sup>(1)</sup>

The findings of the study are presented, hypothesis by hypothesis, in Part III (Chapters Seven- Eleven). The purpose of this chapter is not to duplicate this presentation but to identify trends and to present perceived important developments during the period of study and some of their possible implications. Specific implications of findings relating to hypotheses for the policies and practices of the three groups of associations selected for study are presented in Chapter Thirteen.

One needs to approach the overall findings of the study with some caution when drawing conclusions with a view to amending existing theoretical understanding of professional associations. Findings are based upon documentary sources, participant observation and a relatively small number of questionnaire responses and interviews. Amalgamating and comparing all the status maintaining with all the status seeking responses was considered. It was felt, however, that this would not substantially increase the applicability of the findings to professional associations in general, given the noticeable differences between the findings for the three groups of associations.

The alternative approaches to association categorisation explored in Section 12.9 reflect both the limitation of, and the opportunities afforded by, the evidence that has been collected. One alternative considered is the ranking of all the associations studied in a continuum from the association that appears the highest, to the association that appears the lowest, in status.

Throughout the period of the study, the author continuously monitored appropriate Journals and sources of information in order to follow developments in the literature relating to the professions, professionalism and professionalisation. Work relevant to the study was incorporated in the theoretical understanding of the professions, professionalism and professionalisation developed in Chapter Two. The limited number of references to 'parallel' studies of other investigators in the presentation and discussion of the findings of the study in Part IV is a reflection of the dearth of such studies, and the absence of strictly comparable studies.

The author also 'kept an eye upon' 'parallel' developments concerning certain associations other than those studied in order to judge the applicability of the findings of the study to occupational associations in general. This was particularly relevant in the case of Chapter Fourteen concerning the management of occupational associations. Use was made of material collected (supplemented by subsequent monitoring) in respect of the 'management services' (British Computer Society, Institute of Data Processing, Institute of Management Services, Institute of Statisticians) group of associations initially selected for study (see Section 3.3 of Chapter Three), and resulting from the author's membership, throughout the period of writing up of the study (1986-87), of the Council for the Professions Supplementary to Medicine.



## 12.2 THE CONCEPT OF THE PROFESSION

The concept of the profession was introduced in Section 2.2 of Chapter Two. The hypotheses selected for study and listed in Section 2.7 of Chapter Two derive from this concept of the profession and the author's previous work.<sup>(1)</sup> A summary of the overall findings relating to each of these hypotheses is given in Table 12.1. In the view of the author these findings appear to also have applicability to the 'management services' group of associations (see section 3.3 of Chapter Three) but are not necessarily applicable to other groups of associations.

Of the seven hypotheses [(i)-(vii)] that sought to apply hypotheses and findings from studies of non-management professions to associations that make claims to be professional associations in subject fields that could be broadly categorised as falling within functional fields of management, only two are supported, in the sense that the evidence is consistent with them, across the range of associations studied [(v) and (vii)]. Two are supported for accounting associations only [(ii) and (iii)], while one (i) is supported for business graduates only. Of the remaining two hypotheses in this category, one was not conclusively supported (iv) while the validity of the other was doubtful (vi).

On the basis of hypothesis (v) (which received some support) one would expect established 'status maintaining' associations to be creators of knowledge, and 'status seeking' associations to be reproducers of knowledge. The study tends to confirm the utility of knowledge and knowledge creation (hypothesis (v)) as a 'trait' to distinguish the established professional association.<sup>(2)</sup>

A larger bureaucracy is also confirmed as of value as a distinguishing 'trait' or characteristic of the established professional association (hypothesis (vii)). Status maintaining associations, according to hypothesis (vii) (with which the evidence was largely consistent) have larger bureaucracies and more formal organisations and procedures than status seeking associations. This result may be a consequence of a longer life and further progress along a process of professionalisation. Both these factors give greater opportunity for a bureaucracy to accumulate.

TABLE 12.1

Summary of Findings for all Hypotheses

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Overall Findings</u>
(i)	Social Class Origins	Evidence consistent for Business Graduate Associations only
(ii)	Self-recruitment	Evidence consistent for Accounting Associations only
(iii)	Association Preferences	Evidence consistent for Accounting Associations only
(iv)	Concept of Professionalism	Not conclusively supported
(v)	Knowledge Creation	Some support
(vi)	Professional Orientation	Validity doubtful
(vii)	Bureaucracy	Largely supported
(viii)	Links and Joint Ventures	Supported (evidence consistent)
(ix)	Search for Status as Motivator	Evidence consistent for Accounting and Management Associations
(x)	Values associated with Professionalism	Validity doubtful
(xi)	Status Attributes	Some validity for Accounting Associations only
(xii)	External Threats	Not proved
(xiii)	Drive for Standing, Recognition, Identity and Self-respect	Evidence consistent for Accounting Associations only
(xiv)	State Recognition	Evidence consistent for Accounting and Management Associations
(xv)	New Activities	Evidence consistent for Accounting and Management Associations
(xvi)	Opinions and Recognition by other Associations	Clearly supported (evidence consistent) for Accounting Associations only
(xvii)	Activity and Status Gaps	Supported (evidence consistent)

TABLE 12.1 (CONT'D)Summary of Findings for all Hypotheses

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Overall Findings</u>
(xviii)	Status Insecurity	Not supported
(xix)	Relevance of Expertise	Not supported
(xx)	The Encouragement of Volunteers	Supported (evidence consistent)
(xxi)	Resource Allocation	Evidence consistent for Accounting Associations only
(xxii)	Image Issues	Partial/Qualified Validity
(xxiii)	Membership Development	Evidence consistent for Accounting Associations only
(xxiv)	VIP Member Identification	Evidence consistent for Accounting Associations only
(xxv)	Explicit Acknowledgement of Membership	Some support where relevant
(xxvi)	Additional Qualifications	Validity doubtful
(xxvii)	Code of Practice and Disciplinary Matters	Validity doubted
(xxviii)	Status Explicit in Publications	Not conclusively supported
(xxix)	Peer Body Status Self-consciousness	Evidence consistent for Accounting Associations only
(xxx)	Two-way Communication with Members	Evidence consistent for Accounting Associations only
(xxx1)	Publicising Representation Activity	Not supported
(xxx2)	Opportunism	Not conclusively supported
(xxx3)	Sensitivity to External Status Opinions	Some support but not conclusively supported
(xxx4)	Promotional Activity	Not supported

Hickson and Thomas found a positive correlation between the age of an association and scores on their scale of professionalisation which incorporated 'bureaucratic' characteristics.<sup>(3)</sup>

The notion of a knowledge base as the principal distinguishing trait of particular profession may need to be modified to take account of the rate of change of knowledge, its rapid erosion in the absence of a demanding commitment to continued updating, the blurring of discipline boundaries, and the emergence of such universal technologies as information technology.

Similarly, to achieve flexibility and reduce the delivery costs of services, professional associations may need to take a closer look at ways of reducing central overhead costs. In the future, the more successful associations may be those which are better able to control and cut back their bureaucracies.

Only in respect of the accounting associations was the evidence consistent with hypotheses (ii) and (iii). Hypothesis (ii) suggests that the extent to which children join the professional associations of their parents is lower for status seeking associations than for status maintaining associations, while hypothesis (iii) suggests that many status seeking association Council members would ideally prefer to be members of a perceived status maintaining association.<sup>(4)</sup>

In the case of the accounting associations, the findings in respect of hypothesis (ii) and (iii) (concerned with self-recruitment and association preferences) are intuitive in the sense that, if self-recruitment is to exist as a phenomenon and membership of one professional association is to be prized above others in its field, one would expect this to be evident in the case of such a well established and recognised association as the ICA.

Only the evidence collected for the 'business graduate' associations was consistent with hypothesis (i) which suggests that Council members of status seeking associations tend to be of lower ranking class origins than Council members of status maintaining associations.<sup>(5)</sup> The result for hypothesis (i), concerned with social class origins, may be explained by the overwhelmingly middle-class origins of questionnaire respondents and those interviewed. An implication of this finding is that the professional association may become of less significance as a channel of collective social advancement.

Hypothesis (iv) suggests that Council members of status maintaining associations possess a more highly developed concept of professionalism than Council members of status seeking associations.<sup>(6)</sup> This hypothesis was not conclusively supported in terms of the consistency of the evidence with it. The findings in respect of hypothesis (iv) could be a consequence of the extent to which the concept of professionalism is understood and internalised by a wide range of professional associations.

The findings for hypothesis (vi), concerned with professional orientation, could be consistent with those for hypothesis (iv). The evidence throws some doubt upon the validity of hypothesis (vi) which suggests that members of Councils of status maintaining associations are more professionally orientated than members of Councils of status seeking associations.<sup>(7)</sup> It may be that an individual is either professionally orientated or is not, and either understands and believes in the importance of professionalism or does not. If membership of a professional association represents prima facie evidence that one is basically professionally orientated and believes in the importance of professionalism, then, possibly, the 'indicators' used in the study were not sufficiently sensitive to measure degrees of professional orientation and professionalism.

Of the twenty-seven hypotheses [(viii)-(xxxiv)] that sought to submit tentative suggestions arising out of the author's previous work<sup>(8)</sup> to more rigorous and systematic testing, only four were supported [(viii), (xvii), (xx), (xxv)] where relevant across the full range of associations studied.

The evidence was consistent with hypothesis (viii) which suggests that, while status seeking associations consciously seek links and joint ventures with associations of relatively higher status, status maintaining associations consciously seek to avoid links and joint ventures with associations of relatively lower status.<sup>(9)</sup> The findings in respect of hypothesis (viii), concerned with links and joint ventures, could be summarised as 'birds of a feather flock together'. They raise the possibility of the 'networks' to which an association belongs being used as an indicator of association standing. Participant observation evidence suggested that members of some Councils (eg BIM, ICSA, ICA) used such an 'indicator' of relative standing.

The evidence was also consistent with hypothesis (xvii) which suggests that Councils that perceive their associations to be relatively low in status, and which perceive a gap between an existing level of status and a desired status target or level of perceived satisfactory status, tend to favour status enhancing activity to raise their existing level of status rather than a lowering of their 'target' level or threshold of satisfactory status.<sup>(10)</sup> The findings in respect of hypothesis (xvii), concerned with activity and status gaps, could be evidence that a process of professionalisation is operating with Councils identifying and seeking to reach relatively objective stages in the process.

The third hypothesis arising out of the author's previous work with which the evidence was consistent (hypothesis (xx)), suggests that Councils that perceive their associations as being relatively low in status exhibit a greater concern with formal and informal initiatives to encourage a flow of volunteers willing to assist association activities.<sup>(11)</sup> It is possible that certain of the status seeking associations (eg BBGS, CAM) seek to encourage a flow of volunteers willing to assist association activities (hypothesis (xx)), in part because of their more limited full time staff resources, and because participation in association affairs is not perceived as of such career benefit as may be the case with more recognised professions (eg ICA). Interview and participant observation findings supported this interpretation.

The fourth hypothesis (hypothesis (xxv)), arising out of the author's previous work and which received some support (where relevant), suggests that Councils that perceive their associations as being relatively low in status are more likely to be concerned with the extent to which members make explicit and acknowledge their associations memberships, for example, by making use of their designatory letters.<sup>(12)</sup> Explicit acknowledgement of membership (hypothesis (xxv)) by Council members could be of greater importance to the status seeking associations in view of their generally smaller size, more limited resources and lower public profile. In such circumstances, the incremental contribution of an individual quoting membership is likely to be more significant.

Eleven of the twenty-seven hypotheses derived from the author's previous work [(x), (xii), (xviii), (xix), (xxvi), (xxvii), (xxviii), (xxxi), (xxxii), (xxxiii), (xxxiv)] were not conclusively supported, or were of doubtful validity.

With no fewer than eleven hypotheses of doubtful validity, one must question the value of the status seeking, status maintaining distinction. It may be that, as with the hypotheses relating to concept of professionalism (hypothesis (iv)) and professional orientation (hypothesis (vi)), certain degrees of difference become difficult to measure in respect of a group of organisations that are all professional associations.

Thus values associated with professionalism (hypothesis (x)), awareness of threats to professional standing (hypothesis (xii)), the relevance of expertise (hypothesis (xix)), seeking further professional qualifications (hypothesis (xxvi)), concern with code of practice issues and disciplinary matters (hypothesis (xxvii)), recognition of the importance of professional standing in association publications (hypothesis (xxviii)), giving publicity to the process of representation (hypothesis (xxxi)), a degree of opportunism in respect of new professional activities (hypothesis (xxxii)), and sensitivity to external confirmations of and assessments of professional status (hypothesis (xxxiii)) could be factors that distinguish all professional associations.

A degree of opportunism in respect of new activities (hypothesis (xxxii)) and a questioning of the effectiveness of promotional activity (hypothesis (xxxiv)) could be little more than good management practice that happened to be observed to roughly the same extent by most of the associations studied.

The other eight hypotheses may all be concerned with useful indicators or distinguishing characteristics of professional associations. By definition, one might speculate that inclusion in the study as a professional association has resulted in these common characteristics being exhibited by these associations to an extent that obscures relative differences between them. It is possible also that measures used in the study are not sufficiently sensitive to detect relative differences between associations. Alternatively, considering that these hypotheses are largely dealing with the concerns of association Councils, it could be that these Councils are having to be more concerned with such considerations as the quality and relevance of the services they are providing to members rather than their more traditional concerns with status.

The evidence was not consistent with hypothesis (xviii) which suggests that status insecurity in Councils that perceive their associations to be relatively low in status tends to be related more to externally defined and relatively objective thresholds of satisfactory status than internally defined and relatively subjective thresholds.<sup>(13)</sup> The findings in respect of hypothesis (xviii) concerned with status insecurity are not consistent with those for hypothesis (xvii) concerned with activity and status gaps. The later findings could be explained by the fact that status thresholds are externally defined and relatively objective, while the former findings suggest that for status seeking associations status insecurity does not relate more to such externally defined and relatively objective thresholds. This inconsistency may be explained by the finding that internally defined thresholds of satisfactory status appear to reflect externally defined thresholds. Interview discussion suggested this to be the case.



Hypothesis (xxii) had partial/qualified validity. Eight of the remaining hypotheses [(xi), (xiii), (xvi), (xxi), (xxiii), (xxiv), (xxix), (xxx)] derived from the author's previous work had some support or validity for the accounting associations only. The SCCA/ICA matched pair is the most 'telling' out of the matchings of the associations selected for study. It may be that the ICA, of all the associations selected for study, is closest to the 'traditional' or 'classic' concept of the 'established' professional association. In section 12.9 of this chapter, the ICA ranks as the highest in status on all the ranking indicators used to rank the associations selected for study in terms of their 'status' (see Table 12.2). The status 'gap' between the ICA and the next ranked associations (see Table 12.3) suggests that, in status terms, the ICA may be 'different in kind' from the other associations studied.

Hypothesis (xxii) suggests that Councils that perceive their associations as being relatively low in status and which exhibit status insecurity are more concerned with image issues.<sup>(14)</sup> The findings in respect of hypothesis (xxii) might have been less clear-cut if the qualification 'exhibit status insecurity' were not included. With hindsight, the hypothesis could be said to be circular in that concern with image issues is a possible indication of status insecurity.

The degree of support for the former group of eight hypotheses in the case of the accounting associations could derive from the large absolute gap in status between the ICA and SCCA. Hypothesis (xi), for example, suggests that the individual search for attributes perceived as associated with status aspects of professionalisation are more explicit in the case of members of Councils that perceive their associations as relatively low in status<sup>(15)</sup>; while hypothesis (xiii) suggests that the drive for standing, recognition, identity and self-respect is stronger among members of such Councils.<sup>(16)</sup> In the case of hypothesis (xi), concerned with status attributes, the findings could possibly be explained by the fact that the ICA conferred upon its members, as a result of its standing, the attributes perceived as associated with status aspects of professionalisation without their having to positively 'search' for them.

Similarly, the findings for hypothesis (xiii), concerned with drive for standing, recognition, identity and self-respect could be explained by the fact that 'drive' per se was not required when standing, recognition, identity and self-respect had already been achieved to a satisfactory degree. Participant observation and interview evidence suggested this to be the case.

The findings in respect of hypothesis (xvi) on opinions of and recognition granted by other associations are not unexpected. This hypothesis suggests that Councils that perceive their associations to be relatively low in status are more concerned with status opinions of, and recognition granted by, Councils of other associations perceived as higher in status.<sup>(17)</sup> The ICA appeared to have achieved a position of eminence that was to a large degree impervious to the views of other accounting associations, while, in the case of the SCCA, the recognised accounting bodies were perceived as having the power and influence to frustrate the achievement of certain forms of recognition by the SCCA. Participant observation suggests this explains why the SCCA was noticeably more concerned than the ICA with the opinions of peer bodies (hypothesis (xxix)). This hypothesis suggests that Councils that perceive their associations as being relatively low in status are more 'status self-conscious'.<sup>(18)</sup>

Another hypothesis (hypothesis (xxi)), only 'supported' in the case of the 'accounting' associations, suggests that Councils that perceive their associations as being relatively low in status devote a relatively higher proportion of their financial and full-time staff resources to activities concerned with the enhancement of status.<sup>(19)</sup> So far as resource allocation (hypothesis (xxi)) is concerned, one needs to distinguish between the proportion of resources and the absolute level of resources devoted to the enhancement of status. As an association progresses along a process of professionalisation and both achieves certain forms of recognition, and expands the range of services offered to members, one may observe (as in the case with the ICA) a high level of absolute resource allocation devoted to the enhancement of status, but one that falls as a proportion of total resources (see Tables 8.6 and 8.7).

- Two further hypotheses for which only the evidence in respect of the 'accounting' associations appears to be consistent are hypotheses (xxiii) and (xxiv). These hypotheses suggest that Councils that perceive their associations as being relatively low in status are more concerned with quantity of membership and recruitment of new member issues (xxiii), and with the identification of VIP members within membership lists (xxiv).<sup>(20)</sup>

The findings for hypotheses (xxiii) and (xxiv) in part reflect the reality that, unlike the ICA, the SCCA could not take a flow of applicants wishing to register as students and a flow of VIP members willing to participate in, and support, association activities for granted. The SCCA, in comparison with the ICA, found both students and VIP volunteers difficult to attract. As with the other hypotheses in this group of eight with some support in the case of the 'accounting' associations, such a pronounced 'gap' in the situation of the status maintainer(s) and the status seeker(s) was not so apparent with the 'business graduate' and 'management' associations.

The final hypothesis in the group of eight for which the evidence in respect of the 'accounting' associations was consistent is hypothesis (xxx). This suggests that Councils that perceive their associations as being relatively low in status are less likely to exhibit concern regarding active two-way communication with members.<sup>(21)</sup> The relatively low concern of the SCCA, in comparison with the ICA, regarding two-way communication with members (hypothesis (xxx) could also be explained by a lack of confidence due to the fact that allegiance of its members and their continuing membership could not be taken for granted to the same extent. Participant observation suggests a SCCA preference for not 'stirring things up' and only 'going out' to members when there was something positive to support.

The final three hypotheses [(ix), (xiv), and (xv)] of the twenty-seven derived from the author's previous work were supported for the accounting and management associations. Hypothesis (ix) suggests the search for status is a stronger motivator of further steps along the process of professionalisation in the case of Councils that perceive their associations as relatively low in status.<sup>(22)</sup> Such 'status seeking' Councils also (hypothesis (xiv)) place a higher priority upon the achievement of some form of state-recognition or additional form of state-recognition, and (hypothesis (xv)) the contribution of significant new activities to questions of standing, recognition, authority and status is a relatively more explicit and significant element in their discussions concerning whether or not such activities should be undertaken.<sup>(24)</sup>

The findings of these hypotheses concerned with search for status as motivator of further steps along a process of professionalisation (hypothesis (ix)), state recognition (hypothesis (xiv)) and the contribution of new activities to status, standing and recognition (hypothesis (xv)), in so far as they relate to the 'business graduate' associations, could derive from the fact that both the BGA and BBGS conferred membership on the basis of qualifications awarded by other institutions. Additionally, the BGA was largely concerned with the recognition and standing of the 'MBA' qualification, rather than with its own status and standing as an association. The accounting and management associations did not distinguish between the standing of their qualifications and their standing as associations to the same degree.

Hypotheses (i), (ii), (iii), (iv), (v), (vi), (vii), (x) and (xi) were concerned with characteristics that relate to the definition of the distinction between status seeking and status maintaining associations. The remainder of the hypotheses examined could be said to be more concerned with the consequences of this distinction.

Of the group of hypotheses that relate to the definition of the status categorisation of associations, the validity of hypothesis (iv) relating to the concept of professionalism is not supported, while that of hypothesis (vi) concerning professional orientation and of hypothesis (x) concerning values associated with professionalism is doubtful. [Hypothesis(x) had suggested that values associated with professionalism would tend to be more uniform among members of Councils that perceived their associations as relatively high in status.<sup>(25)</sup>] Only hypothesis (v) (concerning knowledge creation) and (vii) (concerning bureaucracy) appear to have some support in respect of all three groups of associations studied. These hypotheses suggested that status maintaining associations (compared with status seeking associations) are creators rather than reproducers of knowledge (hypothesis (v)), and are likely to have larger bureaucracies and more formal organisations (hypothesis (vii)).

These findings of the study, while confirming a consistent and largely universal awareness of and concern with status issues on the part of professional associations, suggest the categorisation of associations into status maintaining and status seeking groups is more problematic.

The study has thrown some further doubt upon the value of classifying management associations by certain trait or characteristics (eg social class origins, self-recruitment, concept of professionalism, 'professional' orientation, values, status attributes) in furthering understanding of the behaviour of these associations. On the other hand, such characteristics as concern with knowledge creation and greater bureaucracy do emerge as possible distinguishers of the more 'recognised' professional associations.

An examination of characteristics alone does not only ignore important aspects of the environment or context within which a profession operates, it also neglects such significant factors as the attitudes, values and drives of those who serve on the governing organs of associations. This study is in a sense a bridge between the trait and functional, and neo-Weberian approaches, in that while the focus is upon status and image attitudes and perceptions, these subjective considerations are related to a number of the traditional traits or characteristics of the professions.

As traditional 'indicators' of professional status such as possession of a Royal Charter become more common characteristics of 'management' associations, it may be that one needs to consider categorisation of these associations not on the basis of characteristics, but on the basis of the attitudes of their Councils toward such characteristics. It is possible that certain basic attitudes and values may become more 'shared' across professional associations as the professions and 'professional' patterns of work attract individuals with certain needs and characteristics in common.(26) As 'core' 'professional' traits and characteristics become more common, and basic 'professional' attitudes become more 'shared', it is also possible that more sensitive measures of degrees of difference between associations will be needed in both the trait and functional, and the neo-Weberian, approaches. It is possible that the spread or diffusion of similar attitudes and perceptions has resulted in the measures used in this study being insufficiently sensitive to record such differences.

The study has consciously sought to examine groups of professional associations that range from the relatively old established (accounting associations) to those of more recent formation (business graduate associations). In general, during the period of the study, the tendency of groups of individuals to establish professional associations in particular sets of circumstances continues.

Existing professional associations exhibit a strong drive to continue in existence. For some individual members of professional association governing organs encountered during the course of the study, the continued existence per se of a particular professional association appeared to be of itself a sufficient reason and rationalisation for the commitment of considerable personal time and effort.

In the course of the study, further evidence has been uncovered relating to aspects of the previous work of the author<sup>(27)</sup> that have not been formulated as specific hypotheses for systematic testing in the context of the study. The study, for example, provided some support for the suggestion that the wider the vocational area in which the members of a professional association are employed and the more heterogeneous a professional association's membership (eg IoD, BIM), the more oriented it is likely to be to representational activity.<sup>(28)</sup> Similarly, such professional associations are likely to be less concerned with matters relating to professional services and issues in comparison with associations in relatively narrow and more clearly defined fields and with more homogenous memberships (eg IPR, IM).<sup>(29)</sup>

It has been possible to discern a continuation of a trend for the focus of professional association contact with members and technical activity to be based upon employment sector rather than geographic location.<sup>(30)</sup> Throughout the period of the study, both ICOSA and the IPR extended the range of their 'vocational' or 'special' interest groups or 'panels', while the ICA also began to form such sub-groups (eg for information technology). The SCCA, during the period of the study, put a steadily increasing effort into meeting the distinct needs of the practising section of its membership, while the IoD and BIM began to explore mechanisms for bringing together elements of their memberships on the basis of 'common interests'.

The study confirmed that, overall, status maintaining professional associations appear to engage in a greater volume of submissions and representations than status seeking professional associations, and appear to be relatively better informed in respect of the process of representation.<sup>(31)</sup> (In part, this is a consequence of their relatively greater resources.) They also published a greater quantity of material. The study did not, in the case of the management associations, support the suggestion that status maintaining associations are more willing than status seeking associations to publish details of their membership.<sup>(32)</sup>

Prestige social events and functions appear to be important to the professional association. Association with individuals perceived as having VIP status appears to be of greater significance to status seeking associations than to status maintaining associations.<sup>(33)</sup> The study also confirmed an earlier finding of the author<sup>(34)</sup>, that status seeking professional associations appear much more willing than status maintaining associations to both discuss and establish prizes and awards. (This was particularly noticeable in the case of the management associations.)



### 12.3 TRENDS AND FACTORS RELATING TO THE CONCEPT OF THE PROFESSION

Professions and professional associations face a range of problems, threats and challenges to their existing status and standing. Those identified by individual questionnaire respondents are set out in Tables 9.1, 9.3 and 9.5. The lack of recognition and standing of the business studies degree and MBA is clearly of concern to members of the Councils of the 'business graduate' associations. Fragmentation and heterogeneity, competition from other providers of professional services, complexity, the 'relationship' with government and threats to autonomy and self-regulation are among the issues identified by LSCA respondents which are considered in this chapter. Both LSCA and SCCA respondents identify the impact of new technologies as a 'challenge'. IPR responses suggest that the IPR (in the view of these Council members) has considerable progress to make along the path of professionalisation. A high proportion of the issues identified by IPR respondents relate to the status, standing and recognition of the IPR and the 'profession' of public relations.

The importance given by individual questionnaire respondents to particular challenges is set out in Tables 9.2, 9.4 and 9.6. In the case of BGA respondents, the highest importance tends to be attached to 'recognition', which interview and participant observation suggests (see Chapter Nine) relates to recognition of the MBA rather than of the BGA. While SCCA respondents put a relatively high importance on challenges relating to 'recognition' of the SCCA, the LSCA respondents rank the 'challenges' of 'relevance', public opinion and 'state/regulatory interference' as the most important. ICSA and IPR responses are similar, with a relatively high importance placed upon recognition, external and public opinions, and the recruitment of new members and students.

The importance of various professional association activities to individual questionnaire respondents is set out in Summary Table 7.27-29 and Tables 7.27-7.29 in Appendix XXXI. The activities of greatest importance to BGA respondents are 'education' and maintaining standards of entry. BBGS respondents put a relatively high importance upon the development of knowledge and the representation of members' interests, activities which do not feature prominently in the Society's programme. The most important activities for LSCA respondents are 'education', and the maintenance of general standards and standards of entry. 'Education' is also the activity upon which SCCA respondents place the greatest importance, but recruiting new members, and the representation of members' interests (rarely undertaken by the SCCA), also rank as relatively important to SCCA respondents. 'Education' and the maintenance of standards are of relatively high importance to both ICSA and IPR respondents. The development of knowledge and the representation of members' interests (important apparently for all status seeking associations) are also of relatively high importance for IPR respondents, in spite of the limited role of their Institute in these areas. These responses justify the importance placed upon education and standards in defining the concept of the profession (see Section 2.2 of Chapter Two).

The views of these respondents on professional issues are set out in Summary Table 7.19-21 and Tables 7.19-7.21 in Appendix XXXI. BGA and BBGS respondents place a relatively high importance upon issues relating to the 'individual' (eg personal and professional integrity, personal competence) and, in the case of BGA respondents, service to society. Both LSCA and SCCA respondents also put a high relative importance upon individually orientated issues such as personal competence and personal and professional integrity. Ethics, standards and image are also important to both LSCA and SCCA respondents.

The importance given to personal and professional integrity and personal competence is repeated with the ICSA and IPR responses. An identifiable knowledge base, standards and a code of practice are also important to ICSA and IPR respondents.

IPR respondents put a relatively high importance upon image. Overall, for the total population of respondents, the issues of greatest importance are personal and professional integrity, and personal competence.

Overall, the study indicates that caution should be exercised in uncritically applying a notion of a 'profession' derived from past conceptualisation based upon the notion of an ideal type profession. This is particularly so in the case of management associations.

In the course of the study, a number of trends, factors and other considerations that relate to the 'traditional' concept of the profession have been identified. A selection of them are presented in this section. Such trends, factors and considerations need to be taken account of in reassessing, refining and updating this 'traditional' concept as applied to the professional associations that are the subject of this study. The trends and factors considered in this section relate to the associations studied. In the view of the author, they have applicability to the 'management services' group of associations (see Section 3.3 of Chapter Three), but they should not be taken as being necessarily applicable to other groups of professional associations with which the author is familiar (eg professions supplementary to medicine).

A much wider group of interests (including employers, clients, academic institutions, public bodies and association members themselves) now appear to have views on the nature of professional skill and competence. Professional associations have increasingly to take account of (and even accommodate to) such 'external' views. This has been acknowledged by such an established professional association as the ICA.<sup>(35)</sup>

The 'traditional' functions of training and skill modification need to accommodate a growing awareness of the distinction between and the different requirements of initial and post-qualification education and training.<sup>(36)</sup> Much education and training that was previously the 'province' of the professional association is now undertaken 'in-house' by employers and (often on a full time and financed basis) by the state-education system.

Professional associations may in future shift the balance of their emphasis from the development of professional knowledge, perhaps passing increasing responsibility for this to academic institutions, to the application of knowledge within the context of the work place.

The continuing growth of the complexity and volume of knowledge and practice that is encompassed by a 'profession' has resulted in a trend to specialisation and professions are, as a consequence, becoming less homogenous and more 'plural' in the sense of encompassing a particular combination and changing set of specialisms. While individual professional association members may themselves continue to attach importance to standards of competence and notions of professional ethics and values, the standards and values of a profession as a whole must accommodate this greater heterogeneity and pluralism.

An assessment of work may, with growing heterogeneity and the emergence of specialisms and a greater variety of working practices and relationships within a profession, increasingly need to take the particular context within which work occurs into account.<sup>(37)</sup> The emergence of specialisms, greater heterogeneity and a wider variety of academic vocational training options, has also reduced the importance of specified professional training requirements, a particular educational structure or a certain fixed and final training period as distinguishing characteristics of a 'profession'.

Growing heterogeneity of professional association membership could lead to fragmentation and claims for member groups, particularly those concerned with vocational specialisms, to be given greater recognition and discretion within the overall framework of professional associations. Professional associations may in future face greater competition from specialist vocational or interest groups (particularly among members not in public practice) that are perceived by their potential 'customers' and users as offering more relevant services, and which do not carry the overhead costs associated with such 'traditional' professional association activities as those deriving from qualifying or disciplinary roles. One such 'collective' of professionals does operate a 'common code of conduct'.<sup>(38)</sup>

The link between the notion of a profession and the payment of a fee or other remuneration for particular services rendered or tasks undertaken may need to be re-examined as emerging patterns of work result in such work and remuneration practices becoming adopted by groups that have not traditionally been regarded as a 'profession' and which may not possess other attributes of a profession.<sup>(39)</sup> There is some expectation that the professions may in future face greater challenges from those who are 'unqualified' and from individual and groups of non-professionals, particularly if these 'non-professionals' adopt patterns of work hitherto associated with professionals.

State registration may become less significant in the definition of a profession. None of the professional associations studied were involved with state registration. In the context of the present study, the issue of state registration has only been an issue in the case of the accounting profession (see Appendix VIII).

Professional associations may need to respond and accommodate increasingly to external (client, employer and public) assessments of the work of their members. A more customer oriented approach to work, coupled with a changing nature and mode of work, could lead to less explicit emphasis upon general notions of altruistic service to others or to the public good, and to more emphasis being placed by professional associations and their members upon individual problem solving and the task in hand. An ICA President has acknowledged that 'employers judge by personal performance and not by membership of a professional body'.<sup>(40)</sup>

The notion of 'disinterested counsel' or objective professional advice, while still valued, may need to increasingly co-exist with other qualities that appear to be growing in importance to clients/customers such as flexibility and the ability to work in teams and provide specific and tailored solutions.<sup>(41)</sup> Growing commercialism and a more customer oriented approach to the cost effective and profitable marketing of professional services may also blur the traditional distinction, associated with the professions, between the provision of the 'right' advice and most appropriate service to the client and the question of financial gain.

The growing impact of the needs and demands of clients/customers and associated new patterns and processes of work, could be regarded as a restatement and updating of the acknowledgement of the importance of the practitioner/client relationship in the conceptualisation of the profession. A tendency towards a more task centred, problem focused and customer oriented approach to work could enhance the ability of the client or customer (and increase their willingness) to judge the relevance of professional work, services and competence to their needs and requirements.<sup>(42)</sup>

A greater responsiveness to external forces, increasing market/customer orientation and the changing nature of work associated with greater variety and a more task/situation oriented approach, would appear to reduce the perceived importance of such factors as fixed or standard 'professional' charges and fees, objections to advertising and other means of competition for business between individual members of professional associations, and inhibitions upon criticisms of fellow professionals in distinguishing a 'profession'.

In an environment of greater complexity and variety, it may become increasingly difficult to associate 'professional' work with particular forms of organisation and institution. To meet customer needs more professionals in public practice are likely to face considerations of whether or not they should enter into multi-disciplinary partnerships. Faced with rapidly rising professional indemnity insurance costs such practices may incorporate as limited liability companies offering general consultancy services and with or without 'external' shareholders.

Changing relative demand for specialists and generalists, given the lead times involved, will require professional associations to be more flexible in providing relevant services, particularly those associated with training, continuing education and updating. Greater flexibility and more incremental accommodation to member and client/customer demands, may require professional associations to carry out a more frequent review and redefinition of a professional knowledge and expertise base. In 1987 the BIM undertook such a 'first principles' review in order to identify the skill requirements to be covered by its 'Diploma of Management Practice'.<sup>(43)</sup>

New technologies, particularly information technology, have been identified as posing a significant challenge to the traditional professional association and have drawn varying responses from professional associations. Both ICSA and the ICA have established member groups concerned with information technology.<sup>(44)</sup> Information technology will have an impact upon the nature of the work and the work environment of individual professionals. It will also have an impact upon the concept of professional knowledge and expertise, particularly with the growth of expert systems.

There is growing awareness that the image of a professional association may be significantly and disproportionately influenced by the contact the public has with those within its membership that are in public practice. A sudden growth of such awareness was most explicit in the case of the SCCA following its merger with the BAAA, a larger proportion of whose members were in public practice.

Higher expectations, greater demands, more variety and heterogeneity of membership, accommodating to a more demanding environment and the need for a higher calibre of secretariat staff may increase the central or 'overhead' cost of maintaining a professional association in being and raise the minimum threshold of member size for the cost effective operation of a professional association. Of all the professional associations studied, the one most at risk in terms of falling below a minimum threshold of viable size is the BBGS. In 1987 meetings were held between representatives of the BIM and the BBGS to discuss the question of an 'absorption' of the BBGS by the BIM. Larger associations (eg CAM) could also be at risk, given that an association's threshold and viability will reflect the expectations of, and range of, services demanded by members and potential members.

The demonstration of the relevance of professional skills may need to occur on more of a continuing basis and such demonstration may need to be tailored to a greater extent than has hitherto been the case to particular areas of work. A less 'absolute' concept of, and more flexible expectations of, professional competence may emerge.



- Autonomy, independence and self-regulation, traditionally associated with the profession, may, in some areas, need in future to be shared with other organisations and institutions as, increasingly, arrangements and joint ventures are developed and adopted by professional associations in response to new demands and novel situations.<sup>(45)</sup> Responsibility for the development of standards may in future need to become more of a shared responsibility involving closer co-operation by professional associations with academic institutions and, in such areas as financial services, with regulatory authorities. Similarly, maintaining and raising standards of entry to a vocational area perceived by a profession as 'its own' may in future become more of a shared responsibility between professional associations and those academic institutions offering relevant professional and vocational qualifications. (At the conclusion of the study the 'management' associations continued to resist 'graduate only' entry).

In certain areas such as the development of particular standards, the provision of technical services and of professional updating, professional associations (eg BIM, IoD, ICSA) may increasingly establish cost and revenue centres in the hope and expectation that such activities, offered increasingly in competition with commercial organisations, should be self-financing and this may in future make it more difficult to distinguish professional associations through their processes of management and the means by which such services are offered.

The enhancement of earnings potential and career prospects may in future no longer to the same extent be perceived as a consequence of professional qualification and professional membership per se, but rather more as the consequence of the effort put in by the individual member and the nature of the ongoing relationship (and joint responsibility) of the individual member with his or her professional association.



A consistent theme throughout the period of the study has been the growing perceived importance of representational activity. It is possible that representational activity should feature more prominently as a 'trait' or distinguishing characteristic of the professional association. It is possible that more professional associations will broaden the range of subjects on which representations are made from 'technical' issues or issues of direct concern to their professions. Both the BIM and the IoD issued periodic 'manifestos' setting out their views on a wide range of social and economic issues.<sup>(46)</sup>

The 'ideal type' of profession appears to have become, over the course of the period of study, of more limited value in respect of the associations (other than, in certain respects, the ICA) studied. Characteristics associated with the 'ideal type' of profession appear increasingly as issues that need to be addressed by governing organs with appropriate arrangements being made that reflect the balance of interests to be accommodated at a particular moment in time within a dynamic environmental context, rather than as a structural blueprint to be adopted when an identified point has been reached in the accumulation of objective attributes.

The notion of a professional association remains linked with individual membership. The corporate membership of the BGA and BIM did not appear to have a significant impact upon the attitudes, values, behaviour and policies of their governing organs or upon the activities of these associations.

One may see a growing divergence between the management and business professions operating in the private sector, and the personal service professions that remain within the public sector. The typology of occupational interest groups may need to be revised to take account of location in the public or private sector, whether work is undertaken in 'professional' practice for a fee, or by salaried employment, and the extent to which a group faces competition, or is subject to market forces.

In summary, the biggest impact of the trends and factors considered in this section upon the concept of the profession is likely to be upon the notions of 'autonomy' and the maintenance of 'occupational control' which have been closely associated with concept of the profession<sup>(47)</sup>. Resulting from a relative loss of exclusivity of skill, the evolution of alternative forms of 'collective' organisation for professionals and alternative sources of vocational and professional training, a growing heterogeneity of membership and more demanding clients, one may see responsibility for professional self-development and the successful performance of work tasks being increasingly shared between the professional association, its members and their clients. The associations studied may lose an element of 'occupational control' to the clients and employers of their members and to groups of those members themselves. Discussions in which the author has participated with relevant ministers suggest that the Government may in future be more ready to infringe the 'autonomy' of a profession if it feels such infringement to be in the 'public interest'.

## 12.4 THE INDIVIDUAL PROFESSIONAL

Focus in the study of professional associations has been largely upon the relationships between the association and society, and between its members and their clients or 'customers'. This study aims to also focus upon the relationship between the professional association and its individual members. Findings relating to individual questionnaire respondents were set out in Chapter Seven and are summarised in Table 7.35. In addition to their relevance for the associations studied, the findings considered in this section are likely, in the view of the author, to be applicable to the group of 'management services' associations identified in Section 3.3 of Chapter Three.

The further academic and professional qualifications obtained, and subsequent professional associations joined, by individual questionnaire respondents are set out in Table 7.15 and Table 7.16 respectively. A relatively high proportion of BGA respondents are members of another professional association. The smaller proportion of ICA respondents seeking other qualifications appear to do so largely because of a 'specialism' in their 'practice' (eg Taxation). The relatively high proportion of IPR members holding CAM qualifications is a consequence of CAM's assumption of the qualifying role of the IPR (see Section 6.6 and 6.7 of Chapter Six).

The post-qualification education and professional development activity undertaken by individual questionnaire respondents is set out in Tables 7.22 and 7.23 respectively. An overwhelming majority of respondents undertake some form of 'professional updating', the most common being attendance at professional conferences.

A summary of the number of individual questionnaire respondents seeking further academic and professional qualifications and joining further professional associations is given in tables 7.33 and 7.34 respectively. Of all the respondents, those who are members of the ICA appear least likely to seek further academic and professional qualifications. This suggests that their association membership is (in comparison with other associations) regarded as more of a 'definitive' or 'terminal' qualification.

The importance of links and relationships to individual questionnaire respondents is set out in Summary Table 7.24-26 and Tables 7.24-7.26 in Appendix XXXI. Business graduates appear to place a relatively high importance upon links and relationships with both their 'profession' and their employer. LSCA respondents place the highest importance upon links and relationships with their company or employer, and with their workplace peers. SCCA respondents place the highest importance upon links and relationships with their company or employer, and with their industry sector. ICSA and IPR respondents also place the highest importance upon their links and relationships with their company or employer. Links and relationships with workplace peers is also given a high importance by IPR respondents. The group of respondents, taken as a whole, puts significantly greater importance on links and relationships with their company or employer than those with their profession or professional association. A higher importance is also placed (for respondents as a whole) upon links and relationships with workplace peers than those with professional peers.

The professional associations individual questionnaire respondents would join if starting again and their preferred professional associations are set out in Tables 7.17 and 7.18 respectively. These suggest a relatively high degree of satisfaction is associated with being a professional.

The study has shown that there remains, at least among members of the governing organs of professional associations, a relatively strong commitment to and identification with the 'profession'. (This commitment and identification may, in the case of certain associations, not be necessarily shared to the same degree by members in general.)

Formal interviews, informal discussions and participant observation throughout the period of the study confirmed the existence of a common set of values shared by members of the Councils of professional associations that tended to remain relatively consistent. Individuals working within larger commercial organisations, noticeably those with strong cultures, tended to be relatively more employer oriented and less 'profession' oriented than those in practice, either as sole practitioners or in professional partnerships.

While 'demanding' clients or employers are not new,<sup>(48)</sup> it is possible that a more rapid pace of change has 'shared' or diffused 'professional' knowledge within large organisations,<sup>(49)</sup> and overall control of the application of such knowledge (via 'corporate' guidelines) has passed, and hence bargaining power on such matters as corporate salary scales has accrued, to the large 'corporation'.<sup>(50)</sup>

In the course of the study, a number of trends and general background factors have been uncovered that relate to the traditional notion and concept of the individual professional.

In-company 'professional' employees tended to perceive their peer groups as less understanding and supportive of their professional needs and aspirations than those in professional practice. Some ambivalence was detected in those individual professionals recently moving from professional practice to in-company employment. While exhibiting a desire to match personal objectives, goals, attitudes and values to that of a new organisation in order to become a more integrated member of a new peer group, such individual professionals also, on occasion, appeared to go through phases of seeking out periodic links with their professional associations, possibly as a means of re-establishing their own perceived professional self-identity.

A possible future development is a further distinction between and separation of 'practising' from 'non-practising' individual members of professional associations. A clearer distinction could emerge between individuals that hold a particular qualification and are engaged in relevant professional practice and other individuals who hold the same qualification but are engaged in other occupations and activities. One could envisage the emergence of distinct groups within professional associations catering respectively for the interests of 'practising' and 'non-practising' members.<sup>(51)</sup>

Practising individual members of professional associations, either as sole practitioners, or in association with others offering similar professional services, (predominantly via the vehicle of the partnership) are likely to exhibit, to a relatively greater extent, 'professional' characteristics, while the 'non-practising' member (predominantly an employee within a company), in comparison, exhibits, to a relatively greater extent, managerial characteristics. The question has already been raised of the extent to which an occupational group such as, for example, engineers working predominantly as employees can be classified as a profession.<sup>(52)</sup>

One could also envisage a future tendency for the term 'professional' to be used only for those individual members of professional associations (or even non-association members, eg networkers, former 'professional' employees of large companies working from home) who are in public practice and offering a number of clients a professional service.

The concept of the professional independence of the individual professional association member may need to be reviewed. Independence could become associated with new patterns of self-employed contract work (both professional and vocational) such as 'home working' or 'networking'.<sup>(53)</sup> In the case of 'networkers' forming their own companies, there will be legal issues concerning the definition of 'self-employment' to address, and professional associations may need to review their definition of what constitutes 'practice' or a 'practising member'.<sup>(54)</sup>

Those individual professionals still working within organisations, especially international and multinational organisations, may face increasing pressures to conform to relatively strong corporate cultures and corporate standard and preferred procedures, including approaches to work. The existence of and implementation of strong centre issued guidelines by commercial employers may conflict with, and ultimately prove more compelling to individual professionals than, 'external' pressures from their national professional associations.

Within large commercial organisations that stress team and group working, and which put a high priority upon functional flexibility and adaptability, as they themselves evolve, the traditional concept of the professional career may face challenge. Individuals who wish to specialise within a particular 'professional' field may increasingly find themselves at odds with commercial and employing organisations that seek to move individuals across traditional functional divisions.

Those individual employees within larger commercial organisations who seek to specialise and become perceived as specialists may find themselves likely candidates for some form of contract or networking option, while their more generalist and 'managerial' colleagues avoid specialisation in order to build reputations for and track records in general problem solving and team working skills.<sup>(55)</sup> The very concept of team or group working could be at odds with the notion of the traditional individual professional working alone and referring to an established knowledge basis, rather than with colleagues to evolve fresh and unique approaches to the solution of novel managerial problems.

Occupational integrity and identification, economic security and enhancement, and autonomy in terms of the means employed to achieved goals and perform tasks appear to continue to be sought after by individual professionals.<sup>(56)</sup> Certain emerging patterns of work such as networking and home working can increase the individual satisfaction and autonomy of the individual professional,<sup>(57)</sup> while work processes within large organisations such as team or group working can blur the identification of individual contributions and reduce autonomy.

Emerging work practices, organisational and environmental change, and management processes which put more emphasis upon team and group working are likely to make it more difficult to identify and define traditional individual professional career paths. The notion of a steady upward individual professional career path through discrete stages may, for growing numbers of association members, be thrown into question by job moves that appear 'horizontal' rather than 'vertical', but which are undertaken to accommodate to the needs and/or demands of clients/employers, or to allow the individual to accumulate a greater diversity of experience or richness of lifetime experience.<sup>(58)</sup>

A pattern or mode of work may increasingly emerge as the 'central life interest' of an individual professional in place of a standard notion of a professional career or a career path norm.

The emergence of new patterns of work such as homeworking and networking, and the categorisation of individuals taking up such options as 'professionals' does not appear to be significantly widening the ranks of 'professionals' to include manual occupations or work that does not require some specialist knowledge or identifiable expertise that is based upon some theoretical foundation. (The self-assessment of social class, the education of and highest academic qualification held by individual questionnaire respondents are set out in Tables 7.6, 7.7 and 7.8 respectively.) The respondents emerge as overwhelmingly 'middle class'. Work that is categorised as 'professional' (albeit subjectively) is likely to continue to be associated with relatively high levels of remuneration and a relatively high degree of delegation in terms of what should be done by the individual to accomplish a particular task.

Practical or vocational experience of some form remains a requirement of individual membership for all but one (IoD) of the management associations studied, though this is not necessarily linked with an examination structure. It is not a requirement for membership of the business graduate associations (BGA and BBGS).



The notion of the service ethic of professionals may need to be modified to take account of specialism and team working, a wider range of, and more demanding, clients and a heightened awareness of responsibilities and obligations to the professional firm itself as a business, with or without limited liability.<sup>(59)</sup> These factors, plus growing heterogeneity of membership and the emergence of new patterns of work, may force the larger professional association to consider new methods of monitoring the quality of work of members.<sup>(50)</sup>

These findings suggest that an area that has been overlooked in the study of professional associations is the role of the individual professional, and the individual professional's relationship with his or her professional association as consumer of that association's services. It may be that some individual professionals in certain forms of work, particularly in the management professions, have secured greater autonomy and are in a stronger relative power position vis-a-vis their professional association.

## 12.5 PROFESSIONALISM

'Professionalism' has been defined by Vollmer & Mills as "an ideology and associated activities that can be found in many and diverse occupational groups where members aspire to professional status".<sup>(61)</sup>

The concept of Professionalism was introduced in Section 2.3 of Chapter Two. In the course of the study a number of trends, factors and other considerations have emerged of some relevance to the present conceptualisation of professionalism. Emerging patterns of work such as home and networking, for example, are likely to have an impact upon colleague control of work. Professionalism may need to accommodate a widening spectrum of scale ranging from the individual homeworker at one end to the emergence of the commercially driven professional services 'supermarket' at the other. Professionalism will also be tested by the contending pressures of client/employer and colleague/profession control against the background of a possible continuing trend towards greater customer orientation.

Greater variety and heterogeneity and a more dynamic environment may make group or collective social mobility associated with professionalism more problematic.<sup>(62)</sup> The same greater variety and heterogeneity, a more dynamic environment and demands upon individuals to come together and work in teams, task forces or project groups, raise questions for traditional and stereotyped views of the nature and character of professional knowledge, professional work and the professional career.

A growing interdependence between professional associations and academic organisations and the placing of more stress upon problem solving, skill updating, lifetime learning and change skills, and a requirement for tailored, or context oriented action, as against general solutions or standard approaches, may in future blur the distinction between the development of knowledge and the application of knowledge.

This blurring, together with the increasing role played by the state educational system in vocational and professional education, could reduce a profession's control over its knowledge base. Even such an established profession as the legal profession faces pressure for its knowledge base to accommodate itself to the needs of users and a wider 'society'.<sup>(63)</sup>

Some interviewees in the course of the study appeared to have a 'static' concept of professionalism, linking the concept with consistency unchanging standards and fixed or absolute standards. Greater variety, change and heterogeneity may provide more of a challenge to professionalism, professional identity and self-identity than has hitherto been the case. Longer term commitments to such 'traditional' notions as a professional career may conflict with needs and demands for greater flexibility and variety.

More account may need to be taken of the environmental factors that impinge upon both professional associations and their members and the context within which work occurs. These external factors, and a wider range of interests to accommodate, may increasingly challenge, within the context of work (that is itself evolving in pattern and mode), the 'traditional' notion of the relative autonomy of the professional.<sup>(64)</sup> In the case of the accounting profession, the challenges to professional 'autonomy' are such that one informed commentator has spoken of 'the twilight of self-regulation'.<sup>(65)</sup> The legal profession, in the view of another commentator, is equally under challenge.<sup>(66)</sup> If such a basic element of professionalism as 'autonomy' is under challenge in the case of such well established professions as law and accountancy, it may be that the degree of self-regulation to which the notional 'status seeking' association aspires may be illusory.

While a 'concept' of professionalism appeared widespread among interviewees and questionnaire respondents the emphasis varied between the groups of associations. The principle of service to others<sup>(67)</sup> and the concept of disinterested counsel<sup>(68)</sup> appeared to be of greatest importance to the accounting associations and of least importance to the associations the membership of which was made up of business graduates. The concern with standards and integrity of practice<sup>(69)</sup> is also of greatest importance to the accounting associations and of least importance to the associations the members of which are business graduates. In informal discussion, a significant number of BGA and BBGS members appeared to link social responsibility with satisfying customers in a market-place, assumed to be relatively independent and efficient, through the exercise of their skills to bring about a profitable business rather than with an objective and tangible code of professional ethics.

It would appear that categorisation as status maintaining or status seeking could be of greater operational value in understanding association behaviour when related to a more general absolute notion of professionalism. Thus one could say that, relative to the ICA with Royal Charter, statutory and representational or operational recognition, both the BGA and BBGS are at different points along a status seeking continuum.

The differences in characteristics of both the BGA and the BBGS from the ICA may be such as to obscure any relative comparison of these two associations in the testing of hypotheses. The management associations could perhaps also be more profitably located in terms of their positions relative to the ICA. The possibilities for alternative categorisation of the professions are considered in Section 12.9 of this chapter.

## 12.6 PROFESSIONALISATION

Professionalisation has been defined by Millerson as "the process by which an occupation undergoes transition to become a profession".<sup>(70)</sup>

The concept of Professionalisation was introduced in Section 2.4 of Chapter Two. A process of professionalisation was in evidence across all three groups of associations studied, and throughout the period of the study. Its nature and integrity varied by association.

In view of the selection of a period of study of five years, the findings are of limited value in terms of the assessment of existing knowledge relating to a standard or typical process of professionalisation over a longer period of time. The study suggests however that in respect of the associations examined, the present conceptualisation of professionalisation needs to accommodate itself to evolving patterns of work and changing 'customer' attitudes.

Establishing standards of work<sup>(71)</sup> becomes relatively more complex and demanding of resources in an environment of greater complexity that is categorised by a more rapid rate of change. A certain homogeneity of interest and common will is needed if an occupational group is to progress towards professional status.<sup>(72)</sup> In a more changing market context, and with the potential fragmentation of an association's membership into specialisms, the achievement of common interest and direction may become more difficult to achieve.

Occupational groupings are likely to become more flexible and may need to take account of changing foci of specialisms. Progress along a process of professionalisation may in future be increasingly perceived as a commitment to one development model that will reduce flexibility as a result of the closing of other paths of occupational evolution.

Legal protection<sup>(73)</sup> is becoming less attractive where this is perceived as in conflict with self-regulation. The establishment of a monopoly of skills<sup>(74)</sup> is increasingly regarded as a source of potential challenge in a societal environment that has become more questioning of monopolies, to the extent of regarding monopoly as, per se, undesirable, and associated with notions such as 'restrictive practices' and 'vested interests' which are perceived to be against the interests of consumers.

The establishment of appropriate training<sup>(75)</sup> is likely increasingly to take account of what is or could be made available in the vocational sector of the state educational system. The professional association may, in future, find it increasingly difficult to raise the funding to provide training in all specialisms. One may see an increasing tendency towards arrangements between professional and academic institutions. It may be that a future formulation of a process of professionalisation will encompass parallel (and not mutually exclusive) routes through both professional association and vocational state educational institution.

Environmental or external factors (see Section 2.5 of Chapter Two) continue to be important in determining the professionalisation path followed by a particular professional association but their variety and complexity would appear to be increasing. These could lead to more debate, and the emergence of differences of view, on the route to be followed.

There appears to be a growing tendency to acknowledge that, while a professional association needs to serve the public interest, a governing organ of a professional association needs to accommodate a range of other interests if an association is to continue and maintain its relevance in a more demanding environment. Codes of ethics, conduct and practice, ostensibly for the protection of the public, may need to be more broadly drawn as professional associations become more aware of the costs and difficulties associated with disciplinary action and enforcement.

Professional associations appear to be increasingly conscious that continued membership cannot be taken for granted. If the rate of turnover of membership significantly increased, cumulative growth of membership could become more problematic.

Resources may be needed to 'tread water' or survive rather than invest in progress along a path of professionalisation of benefit to future rather than current members.

Recognition can be a matter of subjective factors such as 'image' as well as objective factors.<sup>(76)</sup> Questions of corporate image and corporate identity may become a higher priority issue for the governing organs of both status seeking and status maintaining associations. Image and identity may become more transient, relative and contextual, a further inhibition against trading off current member services in order to finance future professionalisation moves.

To the extent that professionalisation is a process of 'negotiation' with relevant interests,<sup>(77)</sup> and there would appear to be a growth in the range of interests to be accommodated, one may in future find a greater variety of professionalisation paths emerging. This may make generalisation across professions, and the applicability of findings from one group of associations to others, still more problematic.

The professionalisation of the management associations and associations whose members are business graduates have not been sponsored by the state<sup>(78)</sup> as a result of the need of the state for particular services. Were a trend, evident over the period of the study, towards both 'privatisation' and the 'contracting out' of services for the public sector to continue, opportunities for the state to play such a role as sponsor may become more limited.<sup>(79)</sup> The state is likely, however, to continue to create new opportunities for professionals in its role as a client or customer.<sup>(80)</sup>

It may be that relative differences between professional associations in terms of movement along a process of professionalisation are being obscured by movement of all professional associations and a much wider collectivity of 'member' organisations and occupational groups according to certain broad social trends. The next section will outline some of the general background trends that have already been identified which will have an impact and influence upon the actual and perceived roles of the professions in society.



## 12.7 PROFESSIONS AND SOCIETY

Findings relating to the concerns of professional association Councils other than explicitly status concerns are presented in Chapter Eleven.

The problems, threats and challenges to the existing status and standing of the professions and professional associations as identified by individual questionnaire respondents are set out in Tables 9.1, 9.3 and 9.5. The importance given by these respondents to particular challenges is set out in Tables 9.2, 9.4 and 9.6. The views of individual questionnaire respondents on selected professional issues are set out in Summary Table 7.19-21 and Tables 7.19-7.21 in Appendix XXXI. The responses given in these three sets of tables are discussed in Section 12.2 of this chapter.

This section collects together certain general background trends in society and issues that have been identified by the members of professional association governing organs as of relevance for the future role in society of their professional associations and which they will need to address.

Professional associations may need to avoid being portrayed as champions of the unchanging. Those professional associations which resist changes perceived by Government as being in the interests of customers may face more confident pressures from Government encouraging appropriate changes. The ICA (and accounting profession) has already faced such pressures.<sup>(81)</sup> Change, in the case of professions and professionals able to adapt to it, will bring opportunities as well as challenges. Demand for greater flexibility in the face of exponential change may result in such adaptable professionals being cast in the role of catalysts or facilitators of change.<sup>(82)</sup>

Society may look to the professions to meet specific skill needs, a requirement for a higher level of numeracy, or an emerging requirement for teamworking skills. The need for a capability to cope with information technology in general and office systems in particular may become an almost universal requirement.

With the emergence of universal technologies such as information technology and bio-technology that do not observe traditional subject boundaries, greater functional mobility and more emphasis upon teamwork and joint venture and mixed skill partnership arrangements, it may become increasingly difficult for a particular professional association to be able to demonstrate its ability, and that of its members, to make a unique contribution to the solution of such national problems as critical skill shortages, unemployment and inner city regeneration. Associations such as the BIM which embrace a variety of skills may have greater 'staying power' in this respect.

Professional associations may need to justify a professional role. In future it may be unreasonable to assume the role of a profession is understood and accepted. There may be a greater requirement to communicate and market. Even the profession of dentistry, in a 'close relationship' with the state in its practice, has not been immune from pressures in favour of 'advertising'.<sup>(83)</sup>

There will also be pressures in Europe (in Europe there are relatively few professional associations on the 'UK model') for European compatibility,<sup>(84)</sup> and emerging and changing patterns of work, challenges to self-regulation, particularly government inference, and competition from non-professionals to contend with in articulating a distinct and acceptable role for the professional.

A wide range of professional associations may in future face pressures for specialisation, heterogeneity, pluralism and fragmentation. They may experience growing difficulty in monitoring competence and in setting and enforcing standards. Changing attitudes of the public and the courts towards professional liability and the growing cost of professional indemnity could result in the emergence of an economic barrier to public professional practice and the emergence of a demand for the incorporation of professional firms.

Legislative complexity presents particular problems for a professional who is assumed to know the law.<sup>(85)</sup> Professionals may face greater difficulty in keeping up to date, as the volume of material with which a professional is expected to be familiar grows. This may present particular problems for 'sole practitioners' and 'smaller firms' and new forms of association and co-operation between professional firms may emerge.<sup>(86)</sup>

A more critical and demanding membership may result in a different relationship between the professional association and its members. Associations may need to more explicitly acknowledge and address the differing needs, interests and requirements of practising and non-practising members. They may face greater pressure to involve the membership<sup>(87)</sup> and to identify, reflect and accommodate their views.<sup>(88)</sup>

The distinction between the 'not for profit' professional association and the commercial organisation may blur with the need to build flexibility into the organisation structure of professional associations and the requirement for them to operate a management process that is conducive to change and adaptation. Expectations of members that a mission be articulated and a strategy more sharply defined and communicated<sup>(89)</sup> may result in more market or customer orientated professional association management. A more challenging environment may necessitate the recruitment of a higher grade of staff to the secretariats of professional associations.<sup>(90)</sup> The need for professional associations to become more efficient and cost effective as organisations may result in a less clear-cut appreciation of their distinct role.

The representational role which has emerged as perhaps a more significant 'trait' or characteristic of the professional association than has hitherto been the case is not an undemanding one.<sup>(91)</sup> The making of representative representations can be difficult when some elements of the membership are disinterested and apathetic while others involved are interested parties and vocal.

A growing awareness among professionals of the importance of 'image' has already been alluded to. If professionals are seen to be as image conscious as other occupational groups, and as willing to use the latest techniques of marketing and communications in projecting themselves, it may become more difficult for the 'target' of such communications to distinguish between services being offered by professionals and professional associations, and those being offered by other occupational groups.

Boundary problems may arise as new associations emerge and existing associations shift their focus and modify their activity in response to opportunities. The continued development of professional and vocational courses in the state education system and a growing number of arrangements between professional and educational organisations may erode traditional boundaries. An issue raised in interviews was the nature of 'academic' recognition granted to professional qualifications in the United Kingdom and the European Community.

Professional associations are not immune to such 'economic' issues as the cost-effective recruitment of new students and members against the background of a falling school leaving age population. What levels of membership retention will result where membership subscriptions have to be increased in real terms? It has been suggested in interviews that there has been a public view that the established professions have in some sense been above economic and market influences. This perception may change as the economic calculations of professional associations become more explicit and their resulting strategies become apparent.

Professional associations are likely to need to devote greater effort to establishing the relevance of and value of professional skill and qualification to society. They are likely to face greater competition from commercial and specialist organisations in the area of technical updating and professional self-improvement.

The demonstration of relevance of role may need to be effected at European level. The European Commission has a general objective of establishing arrangements and national professional structures and associations that will allow a person it deems to be professionally qualified to practise the profession concerned in any one of the Community's states. In accommodating the European pressures, professional associations in the United Kingdom are likely to become more aware of the rather different roles and responsibilities of the professions in the context of other European states. The consequences of the completion of the 'single' or 'internal market', targeted for 1992 will need to be addressed by professional associations.<sup>(92)</sup>

It would appear that the role of the professional association may be changing rather more than the characteristics by which the professional association continues to be identified and classified. The traditional typology of the occupational association may need to be revisited, particularly in respect of the education and training role of the professional association.

## 12.8 PROFESSIONAL STATUS

The study confirmed the importance of status, standing, recognition and authority for an understanding of professional associations attitudes, values, behaviour and activities. This importance, however, needs to be seen in perspective as other factors such as relevance and quality of service are increasingly important. The study also confirmed the perceived importance of possession of a Royal Charter as a mark of status and recognition.<sup>(93)</sup> The study has suggested however that, increasingly, Royal Charter and 'statutory' recognition may be less useful in terms of understanding day-to-day professional association activity than such notions as 'confirmatory' and 'representational' recognition identified in Sections 10.2 and 10.3 of Chapter Ten.

Livery companies were associated with three of the associations selected for study of which two with Royal Charters have been categorised as status maintaining (ICA and ICSA) and one association that has failed in an application to secure a Royal Charter and is categorised as status seeking (IM). In December 1987, the Council of one association categorised as 'status maintaining' (BIM), and two associations categorised as 'status seeking' (IM, IPR) were committed to the attainment of a Royal Charter.

The perceived importance of professional status to continued professional association viability is both implicit and explicit in the problems, threats and challenges to the status and standing of both professions and professional associations identified by individual questionnaire respondents and set out in Tables 9.1, 9.3 and 9.5 (discussed in Section 12.3 of this chapter) and the importance these respondents attach to the opinions of and recognition by other associations and the recognition given by the members of other professional associations set out in Tables 9.15, 9.16 and 9.17 respectively. The LSCA respondents appear the least concerned with the opinions of other associations. Both SCCA and IPR respondents put a higher importance upon 'recognition' by other professional associations than upon the 'opinions' of such associations.

A summary of the responses of individual questionnaire respondents to questions relating to the status opinions of and recognition granted by other professional associations is set out in Summary Table 9.7-9 and Tables 9.7-9.9 in Appendix XXXI. Respondents from the Councils of all associations (except ICSA) returning individual questionnaires put a higher importance (again) upon 'recognition' by other professional associations than upon the 'opinions' of such associations.

The importance given by individual questionnaire respondents to various forms of professional association recognition is set out in Summary Table 9.10-12 (and Tables 9.10-9.12 in Appendix XXXI) and Summary Table 9.18-20 (and Tables 9.18-9.20 in Appendix XXXI). Respondents from the Councils of all six of the associations in respect of which individual questionnaires were returned place the highest importance upon recognition by 'employers' and by 'members'. The importance given by these respondents to the image of their professions is summarised in Table 9.13. 'Image of the profession' is given a relatively high importance by 'accounting' and 'management' association respondents, but less importance is given to it by 'business graduate' respondents.

Findings relating to the concerns of professional association Councils with status are presented in Chapter Nine and summarised in Table 9.21. Their concerns relating to status drive and professional association activity to increase status are presented in Chapter Ten and summarised in Table 10.20.

The notion of the 'profession' and professional status as a goal or aspiration, an end desirable in itself, persists.<sup>(94)</sup> Occupational groups (eg business graduates) can still be found that make claims to and aspire to professional status. A continuing concern of both the BGA and the BBGS is also likely to be the status acceptance of and recognition accorded to the business studies degree as distinct from their own status and standing as associations.

The trends and factors relating to the concept of the profession identified in Section 12.3 and the background trends and issues identified by professional association governing organ members listed in Section 12.7 of this chapter will have an impact upon both the sources of and perceptions of professional status. A number of these impacts are considered in this section.

The essence of the definition of professional status could shift from the professional association to the professional individual. One could envisage, for example, a situation in which the label 'professional' is not dependent upon membership of a professional association per se but upon a certain pattern of work.<sup>(95)</sup> Such factors as being self-employed or in business by means of a partnership, performing work for more than one 'client' and being remunerated for tasks/projects completed could become characteristics associated with the professional.<sup>(96)</sup>

Qualification per se<sup>(97)</sup> may become of less significance in the definition of professional status as the state education system and in company programmes offer a growing range of 'professional' and vocational courses. At the same time, those who work on a fee basis and who sell a personal expertise and competence, increasingly a competence that crosses subject and disciplinary bodies, will constitute a demand for new skills and services that support both the mode and the content of their work.<sup>(98)</sup>

Professional status is a dynamic quality in that it would appear to be increasingly related to the success of continuing efforts by professional associations to maintain and establish relevance.<sup>(99)</sup> It is possible that the notion of an ongoing 'absolute' level of status based upon a stage reached on a path of professionalisation, perhaps the possession of a Royal Charter, will give way to a much more relative or contextual notion of status. The standing of the professional association in future may be determined much more by 'market' performance in satisfaction of client and member needs, and less by how many of the 'traits' of the archetypal profession are possessed.



A growing emphasis by (especially larger) commercial organisations upon team and group working may make it increasingly difficult in certain contexts to identify the contribution of an individual that would allow a distinct 'professional' input that may be the source of professional status to be defined. The link between professional status and a particular level of demonstrated competence may become more difficult to establish in an environment characterised by more rapid change and with greater heterogeneity.

An important issue is the extent to which a professional qualification can be regarded as equipping an individual for a lifetime career and lifetime professional status.<sup>(100)</sup> Without appropriate continuing education and professional updating, perhaps an initial professional qualification should only be valid for a certain number of years.<sup>(101)</sup>

Were professional status to become more linked to a particular pattern or mode of work, it is possible that individuals, rather than assuming a lifetime professional career, will move in and out of the professional 'lifestyle' at appropriate points in their lives.<sup>(102)</sup> As a consequence, individuals could move in and out of professional association membership according to the relevance of services offered at each point. Such a phenomenon on a significant scale would require professional associations to reassess their requirements for qualification and membership.

A growth in size and fragmentation of membership may have limited the ability of professional associations to achieve collective upward social mobility for their members.<sup>(103)</sup> Groups of members with sufficient common interests that are likely to last long enough for them to feel justified in committing time and other resources to collective advancement may become more difficult to determine. Instead, individuals may opt increasingly for personal advancement, hopping from one professional services supplier to another according to the requirements of their current work and skill or competence profile.

## 12.9 THE STATUS SEEKING, STATUS MAINTAINING DISTINCTION

It was established at the outset (Section 1.1 of Chapter One) that the validity and value of the status seeking and status maintaining distinction in relation to understanding professional association policies, activities and practices, and the opinions and values of members of the governing organs of professional associations lies at the heart of the study. To test the validity of the distinction, it was operationalised into thirty-four separate hypotheses (Section 2.7 of Chapter Two).

Examining the total pool of evidence assembled to test the thirty-four specific hypotheses selected for study, one is able to attempt to rank in status all the associations used to test these hypotheses. To do this is not without its difficulties in view of the collection of evidence to allow the testing of hypotheses by matched sets of association. The overall conclusions of the author's own judgements on relative status ranking are presented in Table 12.2.

The interview findings ranking summarises the totality of relative status assessments of the various associations obtained during the course of interviews. Views on the status ranking of associations in the context of all the associations studied were not positively or systematically sought during the course of the study. Hence these rankings, and, for similar reasons, those based upon the totality of participant observation, should be treated with some caution. Ranking on both these criteria is subjective and should be further qualified by the understanding that relative status rankings beyond the initial groupings into business graduate, accounting and management associations were not always recorded by the author.

The 'subjective' rankings on the basis of interview and participant findings are broadly consistent in that the positioning of no association varies by more than one position as between the two sources of evidence.

**TABLE 12.2**  
**Review of Association Status Categorisation**

<u>Status Ranking</u>	<u>Interview Findings</u>	<u>Participant Observation Findings</u>	<u>Date of Incorporation</u>	<u>Means of Incorporation</u>	<u>Membership 000s</u>	<u>Publishing Activity Note 3</u>	<u>Relevant Resources Note 4</u>	<u>Organisation Note 5</u>
First	ICA	ICA	ICA (1880)	ICA (1880) <u>Royal Charter</u>	ICA (79.3)	ICA	ICA	ICA
Second	ICSA	ICSA	ICSA (1891)	ICSA (1902)	BIM (75)	IoD	IoD	IoD
Third	BIM	IoD	IoD (1903)	IoD (1906)	ICSA (44)	BIM	BIM	BIM
Fourth	IoD	BIM	IM (1911)	IM (1911) <u>Limited by Guarantee</u>	IoD (32.9)	ICSA	ICSA	ICSA
Fifth	BGA	IM	SCCA (1929)	SCCA (1929)	IM (20.9)	IM	IM	IM
Sixth	IM	BGA	BIM (1947)	BIM (1947)	SCCA (6.8)	SCCA	SCCA	CAM
Seventh	IPR	SCCA	IPR (1948)	IPR (1948)	BGA (2.8)	IPR	IPR	SCCA
Eighth	SCCA	IPR	BGA (1967)	BGA (1967)	IPR (2.3)	BGA	BGA	IPR
Ninth	CAM	CAM	CAM (1969)	CAM (1969)	CAM (1+)	CAM	CAM	BGA
Tenth	BBGS	BBGS	BBGS (1973)	BBGS <u>Unincorporated</u>	BBGS (1-)	BBGS	BBGS	BBGS

TABLE 12.2 (CONT'D)Review of Association Status Categorisation

- Notes:
- (1) ----- Indicates an area of uncertainty in the ranking.
  - (2) ===== Indicates possible categorisation boundary.
  - (3) Ranked on total of journal and other publications gross expenditure as per Tables 8.6 and 8.7 and Section 8.5 of Chapter Eight.
  - (4) Ranked on total net expenditure upon activities related to the enhancement of status as per Tables 8.6 and 8.7 and Section 8.5 of Chapter Eight.
  - (5) Ranked on the basis of employment costs as per Table 8.2 of Chapter Eight.

There is some consistency in the findings across the 'objective' sources of evidence in Table 12.2. Compared with the 'subjective' evidence, IM and SCCA rank more highly, and the BIM and BGA less highly, on the criteria of length of establishment. Rankings under the 'Royal Charter' and 'Limited by Guarantee' sub-headings of the 'Means of Incorporation' column of Table 12.2 are by date of award of Royal Charter and of incorporation respectively.

The extent to which the rankings vary according to the criteria of membership, publishing activity, resources devoted to status enhancement and organisation reflects the problems encountered in the comparative status rankings of professional associations. The criteria of Table 12.2 were selected largely because of their availability as a by-product of the study. They are not the criteria one would necessarily have used if setting out ab initio to status rank the full range of associations studied.

The 'objective' criteria of Table 12.2 could be said to be unduly biased in favour of sheer size and scale. Certain of the criteria are interrelated. Thus, other things being equal, one would expect professional association journal publishing costs to be broadly proportional to size of membership.

Rankings of individual bodies within particular columns of Table 12.2 can depart from their 'overall' positioning due to special factors. Thus the 'organisation' of CAM is relatively expensive because of the examining activity which CAM undertakes, but the IPR and BGA (which in other columns rank above CAM) does not undertake.

One could question the choice of ranking criteria in Table 12.2. For example, salary cost was used as a measure of 'organisation' scale rather than the number of employees, as salary cost reflects the 'quality' or skills of employees as well as their numbers. One could also question the extent to which the availability of resources and the undertaking of activity per se is necessarily reflected in, and an appropriate measure of, status and standing. One also needs to understand resources, activities (and status itself) in the context of the profession concerned. These and other considerations underlay the initial grouping of associations into matched pairs and groups (see Section 3.5 of Chapter Three) and the selection of the research approach adopted.

The significance of Table 12.2 for an understanding of hypothesis findings may lie in the differences between the status rankings (as per the table) of the associations in each matched set. Thus the greatest 'status gap' or difference in rankings (seven places), taking the interview findings as the most appropriate indication of a relatively informed view of comparative status, is that for the accounting association matched pair, the ICA and the SCCA. This was the pair for whom the evidence was consistent with the greatest number of hypotheses (twenty-one as per Section 13.3 of Chapter Thirteen). This would suggest that the value of the status maintaining and status seeking distinction in a comparison of professional associations is related to the 'status gap' between the associations in question.

The 'status gap' for the associations, the membership of which is composed of business graduates (BGA and BBGS), is five places on Table 12.2. The evidence collected on the BGA and BBGS was consistent with seven hypotheses (see Section 13.2 of Chapter Thirteen).

Adding the rankings of the status maintaining management associations (IoD, BIM, ICSA) together (nine) and subtracting this from the rankings of the status seeking management associations (IM, CAM, IPR) added together (twenty-two) one has a 'total' gap of thirteen places, or an average of over four places per association in each group. The evidence collected on the management associations was consistent with eleven hypotheses (see Section 13.4 of Chapter Thirteen).

Using the comparative status rankings as per the interview findings, one does not obtain a strictly linear relationship between 'status gap' and the number of hypotheses for which the evidence is consistent. Nevertheless, the outcome is supportive of a view that the status maintaining, status seeking distinction is of greater value in the context of associations that are relatively far apart in status. When the implications of the findings for the policies and practices of professional associations are examined in Chapter Thirteen, one should bear in mind this overall view that perhaps one should have more confidence in the implications for the accounting associations than the remainder of the associations studied.

One could, of course, repeat the exercise of comparing 'status gaps' according to each of the other columns of Table 12.2. If one adds together the ranking positions of all the columns in Table 12.2, one obtains a total of 'ranking' points for each association. This overall ranking, which is perhaps more of a measure of 'standing' than 'status' as it includes such objective items as physical resources which may both reflect and be independent of subjective status assessments, is given in Table 12.3.

The 'standing gap' is five for the accounting associations, three for the business graduate associations and just over four ( $21 - 8 \div 3$ ) for the management associations. The standing differences between the associations are less clear-cut than the 'subjective' status differences based on interview findings. This suggests that subjective status was correctly chosen in the formulation of hypotheses rather than standing as determined by both subjective and objective factors. By comparing the overall position for each association (as per Table 12.3) with individual columns of Table 12.2, one can determine whether the overall comparative standing of an association is greater or less than that which would be suggested by an individual indicator.

Interestingly, the overall 'standing' positions of the 'top' three associations (ICA, ICOSA and IoD) and the 'bottom' three associations (BGA, CAM and BBGS) as per Table 12.3 matches only two of the status ranking columns of Table 12.2, namely those giving the date and means of incorporation, both objective sources of evidence.

TABLE 12.3Association Standing Categorisation

	<u>Total of 'Ranking' Points</u>	<u>Overall Ranking Position</u>
ICA	8	1
ICSA	23	2=
IoD	23	2=
BIM	30	4
IM	39	5
SCCA	50	6
IPR	59	7=
BGA	59	7=
CAM	69	9
BBGS	80	10



It should be noted that both subjective status gaps and overall standing gaps as per Tables 12.2 and 12.3 are supportive of the author's original categorisation of each association as status maintaining or status seeking within its group.

The original research design allowed for the testing of hypotheses within the framework of matched sets and pairs. The availability of continua of associations, either for all the associations studied, or the six associations in respect of which individual questionnaires (Appendix VII) were returned allows one to carry out pilot tests of alternative pairings or matching of associations. The continua are presented (one for each hypothesis) in Chapters Seven to Eleven of Part III. They were developed by ranking the associations concerned according to the nature of the dependent variable differences expected for each hypothesis (Table 3.2).

Using the dependent variable differences summarised in Table 3.2, the continua that have been developed for all thirty-four hypotheses are presented in Table 12.4. It will be seen that twenty-four of the continua are rankings of the six associations in respect of which individual questionnaires (Appendix VII) were returned and have been developed from quantitative indicators based upon the questionnaire responses. The remaining ten continua are rankings of all of the ten associations studied, and have been developed on the basis of the qualitative and subjective assessment of the author.

It should be borne in mind, when making use of the continua summarised in Table 12.4, that the quantitative measures used were, on the whole, relatively crude and single indicators. The qualitative and subjective assessment of the author should also be treated with some caution as the development of continua outside of the matched sets/pairs framework was not envisaged when the research design was formulated. This qualitative and subjective assessment was made over twelve months after the period of field research (which covered the five years 1980-85).

**TABLE 12.4**

**Comparative Association Continua Based Upon The Nature of Dependent Variable Differences**

Professional Association is:

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Status Seeking</u>	<u>Status Maintaining</u>
(i)	Social Class Origins (S)	Lower:	BBGS, ICSA, IPR/SCCA, LSCA, BGA :Higher
(ii)	Self-recruitment (I)	Lower:	ICSA/BBGS/SCCA/BGA, IPR, LSCA :Higher
(iii)	Association Preferences (S)	Another:	SCCA, BBGS, BGA, LSCA, IPR, ICSA :Own
(iv)	Concept of Professionalism (F)	Lower:	BBGS, BGA, SCCA, LSCA, IPR, ICSA :Higher
(v)	Knowledge Creation (F)	Reproduced:	BBGS, BGS, LSCA, SCCA/ICSA, IPR :Created
(vi)	Professional Orientation (F)	Lower:	BBGS/BGA, SCCA/LSCA/IPR, ICSA :Higher
(vii)	Bureaucracy (S)	Lower:	BBGS, CAM, IPR, SCCA/IM, BGA/1oD, BIM/ICSA, ICA :More
(viii)	Links and Joint Ventures (S)	Sought with higher bodies:	BBGS, SCCA, CAM, IM/IPR, BGA/BIM, 1oD, ICSA, ICA :Avoided with lower bodies
(ix)	Search for Status as Motivator (S)	Strong:	IPR, SCCA, BGA, LSCA, ICSA, BBGS :Weak
(x)	Values Associated with Professionalism (S)	Less:	BBGS, SCCA, BGA, ICSA, LSCA, IPR :More
(xi)	Status Attributes (F)	More:	IPR, ICSA, BGA/BBGS, SCCA, LSCA :Less
(xii)	External Threats (I)	Less:	BBGS, LSCA, BGA, IPR, SCCA/ICSA :More

TABLE 12.4 (CONT'D)

Comparative Association Continua Based Upon The Nature of Dependent Variable Differences

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Status Seeking</u>	<u>Professional Association is:</u>	<u>Status Maintaining</u>
(xiii)	Drive for Standing, Recognition, Identity and Self-respect (I)	More:	ICSA, SCCA, IPR, BGA/LSCA, BBGS	:Less
(xiv)	State Recognition (I)	High:	ICSA, SCCA, IPR, LSCA, BGA/BBGS	:Not relevant (achieved)
(xv)	New Activities (S)	Explicit:	CAM, IPR, SCCA, BGA/BBGS, IM, BIM, IoD, ICSA, ICA	:Not significant
(xvi)	Opinions and Recognition by other Associations (I)	Most concerned (sought):	ICSA, SCCA, IPR, BGA, BBGS, LSCA	:Least concerned (not sought)
(xvii)	Activity and Status Gaps (S)/(F)	Upwards:	SCCA, BGA, LSCA, IPR, BBGS, ICSA	:Not relevant
(xviii)	Status Insecurity (F)	Objective:	SCCA, LSCA, ICSA, IPR, BGA/BBGS	:Subjective
(xix)	Relevance of Expertise (S)/(F)	Stressed:	ICSA, IPR, LSCA, SCCA, BGA, BBGS	:Not stressed
(xx)	The Encouragement of Volunteers (I)	Sought:	LSCA/IPR, BBGS, SCCA/ICSA, BGA	:Not sought
(xxi)	Resource Allocation (F)	Higher:	BIM, SCCA, ICA, IM, IPR, IoD, CAM, ICSA, BGA, BBGS	:Lower
(xxii)	Image Issues (F)	High:	ICSA/IPR, SCCA, LSCA, BGA, BBGS	:Low

TABLE 12.4 (CONT'D)

Comparative Association Continua Based Upon the Nature of Dependent Variable Differences

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Status Seeking</u>	<u>Professional Association is:</u>	<u>Status Maintaining</u>
(xxiii)	Membership Development (I)	High:	SCCA, ICSA, BBGS, IPR, BGA, LSCA	:Low
(xxiv)	VIP Member Identification (S)	High:	SCCA, IPR, IM, CAM, BIM, BGA, BBGS, IoD, ICSA, ICA	:Low
(xxv)	Explicit Acknowledgement of Membership (I)	Sought:	ICSA, SCCA, LSCA/IPR, BBGS, BGA	:Not Sought
(xxvi)	Additional Qualifications (I)	Yes:	BGA, IPR, SCCA/ICSA, BBGS, LSCA	:No
(xxvii)	Code of Practice and Disciplinary Matters (F)	Lower:	BGA/BBGS, SCCA, LSCA, IPR, ICSA	:Higher
(xxviii)	Status Explicit in Publications (F)	More:	IPR, CAM, BIM/IoD, IM, ICSA/ICA, BGA, BBGS, SCCA	:Less
(xxix)	Peer Body Status Self-conscious (I)	Higher:	ICSA, SCCA, IPR, BBGS, BGA/LSCA	:Lower
(xxx)	Two-way Communication with Members (S)	Less:	SCCA, IM, CAM, BBGS/BGA, IPR/LSCA, ICSA, BIM/IoD	:More
(xxxi)	Publicising Representation Activity (S)	More:	IoD/BIM, ICA/ICSA, BGA, IM, IPR, SCCA, CAM, BBGS	:Less
(xxxii)	Opportunism (S)	More:	CAM, IM, SCCA, IPR, BIM, IoD, LSCA/ICSA, BGA/BBGS	:Less

TABLE 12.4 (CONT'D)

Comparative Association Continua Based Upon the Nature of Dependent Variable Differences

Professional Association is:

<u>Hypothesis</u>	<u>Subject Matter</u>	<u>Status Seeking</u>	<u>Status Maintaining</u>
(xxxiii)	Sensitivity to External Status Opinions (I)	High:	ICSA, SCCA, IPR, LSCA, BBGS, BGA
(xxxiv)	Promotional Activity (I)	High:	SCCA, BGA, ICSA, CAM, IM/IPR, BBGS, IoD/BIM, LSCA

S - 'Status' Categorisation (ie 'status seeking'/'status maintaining')

F - Categorisation by 'Field' (ie 'business graduate'/'accounting'/'management')

I - Indeterminate

The research design was developed upon the basis of the status seeking and status maintaining distinction (see Chapter Three). It was assumed that the most productive categorisation of associations would be on the basis of 'status'. Hence the status seeking, status maintaining distinction was the basis of matching pairs and sets from the same 'field of operation' or professional area/function (ie 'business graduate', 'accounting', 'management'). One could of course have categorised the associations by 'field of operation'. Using the continua presented in Table 12.4, one is able to compare the two approaches to association categorisation.

It will be seen that thirteen continua (indicated by 'S' on Table 12.4) are consistent with the categorisation of associations by status as 'status seeking' or 'status maintaining'. Eleven continua (indicated by 'F' on Table 12.4) are consistent with the categorisation of associations as 'business graduate', 'accounting' or 'management' associations. In the case of twelve continua (indicated by 'I' on Table 12.4), the result is 'indeterminate' in that the continua do not appear consistent with either approach to association categorisation.

Using Table 12.4, one is able to examine alternative approaches to association categorisation and compare different combinations of association. As a pilot test of alternative pairings of associations, the BIM was compared with the BGA. Both associations could be said to be concerned with individuals who have chosen to pursue a career in management. With the launch of a BIM Diploma in Management Practice linked to membership of the BIM, it could be said that the BIM and the BGA (with BGA membership following the obtaining of an MBA) offer alternative qualification routes. Their relative status rankings (Table 12.3) suggest they are sufficiently far apart to offer a status gap not too dissimilar from that between the accounting associations.

A disadvantage of the BIM and BGA comparison is that while individual questionnaires were returned from members of the BGA Committee, they were not returned (or sought) in respect of the BIM. Thus the continua in Table 12.4 available for a direct BIM/BGA comparison are limited to those which were developed on the basis of qualitative and subjective assessment. Of these ten continua, in five cases the BGA is 'further along' a continuum than the BIM, in four cases the BIM is 'further along' a continuum than the BGA, while in the remaining case both associations are at the same point on a continuum. This inconclusive result supports a 'similar' categorisation of these associations as distinct in kind (eg as 'status maintaining' in the study) rather than in terms of position along a status continuum (eg as in Table 12.3).

An obvious form of comparison would be between the associations in possession of a Royal Charter and those not in possession of a Royal Charter. Such a comparison in the case of the group of associations studied is complicated by the fact that at the end of 1987 two further associations (IM, BIM) were in the process of seeking Royal Charter status, and a further association (the IPR) was positioning itself for a formal application for Royal Charter status. Given that Royal Charter status was not an issue for the 'business graduate' associations, whose members, in any event, held qualifications awarded by institutions (universities) in possession of Charters of their own, the only remaining associations either without a Royal Charter, or not seeking one, were CAM and the SCCA. In the case of CAM, one of its 'constituent' associations (IPR) was positioning itself for a Royal Charter application.

In general, organisations seeking Royal Charter status only begin the process of 'positioning' or preparation, and only take formal steps to acquire a Charter once they have ascertained that such effort is likely to 'bear fruit', and that any application that is made is likely to be successful. Bearing in mind these caveats, and taking the continua for Table 12.4, of the thirty-four continua, in fourteen cases the 'chartered' associations were 'further along' a continuum, in ten cases the 'non-chartered' associations were 'further along' a continuum, while in the remaining ten cases relative positions on a continuum were indeterminate.

Simple categorisation on the basis of whether or not an association has a Royal Charter seems, broadly, no more or less consistent with positions in the continua of Table 12.4 than the author's categorisation as status seeking or status maintaining on the basis of a number of criteria (see Chapters Four to Six). This result is not unsurprising as not one of the author's 'status seeking' associations had obtained a Royal Charter, while three of the five 'status maintaining' associations possessed Royal Charters.

From the overall ranking of associations by status (see Tables 12.2 and 12.3), one could consider the extent to which status categorisation could be predicted on the basis of 'alternative' indicators. One such example would be the age of an association. Given that age is closely related to whether or not an association has a Royal Charter (see Table 12.2), one would expect a similar pattern of positions, on the continua of Table 12.4, as was found with categorisation on the basis of whether or not an association possessed a Royal Charter. The outcome is less clear cut. While for twelve continua the 'older' associations are 'further along', and for nine continua the 'younger' associations are 'further along', in the case of thirteen continua the result is 'indeterminate'.

In summary, the number of continua in Table 12.4 with which the different alternative approaches to association categorisation considered in this section are consistent is given in Table 12.5. While the author's categorisation of associations as 'status seeking' or 'status maintaining' has limitations, it is not clear, on the basis of the evidence collected, that the other approaches to categorisation considered in this section have better predictive value.



TABLE 12.5Alternative Approaches to Association Categorisation

<u>Approach</u>	<u>Number of Continua With Which Consistent</u>
Royal Charter	14
Status (Status Seeking/Maintaining)	13
Age	12
Field of Operation	11
Single Status Continuum (BIM/BGA)	5

## 12.10 ISSUES FOR FURTHER STUDY

The purpose of this section is to suggest certain issues concerning the present conceptualisation of the professions and professionalism for further study that are specifically related to the focus of this study upon professional status and/or could be accommodated in terms of access to an appropriate research situation.

An area of possible future study is the comparison of the attitudes and values of members of professional association governing organs in professional practice with those of their fellow Council members employed by commercial organisations. One could examine the impact of the practising/non-practising distinction against such factors as size of organisation, whether immediate work colleagues are 'professional' or 'managerial' and length of time since initial professional qualification. One could, with a longitudinal study, track over time the attitudes and values of those moving from professional to non-professional employment and vice-versa.

A study of the professional attitudes and values of groups of professional association governing organ members who are respectively in practice and working within companies would allow the extent to which the former group exhibits 'professional' characteristics, and the later 'managerial' characteristics to be tested.

One could ask questions relating to the impact of such trade-offs as that between the requirements of responding to market forces and allegiance to traditional professional codes of practice upon the attitudes, values and relative priorities of individual members of professional association governing organs.

One could also formulate as specific hypotheses for systematic testing certain of those aspects of the previous work of the author<sup>(104)</sup> that have been further qualified by evidence uncovered in the course of the present study and which are set out in Section 12.2 of this chapter.

Other aspects of status that have already been identified by the author and which remain to be examined<sup>(105)</sup> are the relative consistency of status rankings over time, the relative consistency and homogeneity of status perceptions over time, the existence of longer term equilibrium levels of status to which short term deviations return, the existence of a 'status-system' with automatic status-adjustment, the notion of a status-surplus or status-deficit, the link and relationship between credibility and status, satisficing and maximising behaviour in relation to status, aspects of status that particularly relate to categories of organisation such as professional, voluntary or commercial, the extent to which status maintaining behaviour tends to follow on naturally from a previous stage of status seeking behaviour, the impact, implications and consequences of status-gaps, and academic status compared and contrasted with professional status and in particular whether both hypotheses and findings have relevance for academic as opposed to professional qualifications.

In the light of the findings of the study, one could reformulate some of these outstanding issues. For example, one has thrown some doubt on the persistence of status in the absence of continued activity to match changing client and member needs. The 'gaps' that lead and drive professional association policy making and subsequent activities may, in future, relate more to delivery of professional services against identified needs, and less to whether or not certain 'trait' stages on a professionalisation path can be reached.

One could begin to test hypotheses relating to the status seeking/status maintaining distinction to forms of organisation other than professional associations (eg trade associations). Questions relating to status, standing and recognition could be found to be important to a number of different types of organisation.

Whether or not an organisation has achieved a satisfactory level of standing and recognition could be of some importance to organisations such as those concerned with influencing and changing opinions and behaviour (eg representative and lobbying bodies, voluntary organisations). Perceived public image and reputation is not unimportant to the commercial organisation.

One could attempt a longitudinal study. This could follow the pattern of the present study and perhaps examine a narrower and more selective and related set of issues over a longer period of time.

A potentially interesting subject for study would be an association that perceived itself as having accumulated sufficient status, standing and recognition to cross the conceptual threshold distinguishing status seeking and status maintaining categorisation. In such a case one could compare 'prior' and 'post' attitudes, values, behaviour, policies and activities.

One could of course examine the impact upon professional association governing organ and individual governing organ member attitudes, values, relative priorities, behaviour and activities of certain selected trends, factors and other considerations relating to the 'traditional' concept of the profession that are presented in Section 12.3 of this chapter or those relating to the individual professional identified in Section 12.4. Alternatively, one could consider the impact of selected trends, factors and other considerations relating to the concepts of professionalism presented in Section 12.5 and professionalisation outlined in Section 12.6, or those identified by professional association governing organ members themselves and given in Section 12.7 of this chapter. Finally, one could examine the impact of any of the considerations identified in Section 12.8 of this chapter as relating to professional status.

With hindsight and the benefit of the research findings, alternative research approaches that could have been employed in the research situation can be determined. Rather than adopt a 'matched' pair/set approach, one could have employed more sensitive and balanced measures than those used to develop the continua summarised in Table 12.4 in order to allow comparison of any combination of associations across the full range of associations studied. More sensitive measures would have facilitated the detection of 'differences of degree' in respect of associations of similar status. One could then, for example, have compared with greater confidence the ICA and ICSA (which perhaps have most in common in terms of 'characteristics') with all the other associations selected for study. Alternatively, one could have selected certain hypotheses and pursued an inductive approach by mapping the positions of all the associations.

Perhaps one should classify all occupational interest groups together rather than distinguish between the profession and the semi-profession. Where the educational and training role erodes more rapidly than a representational role, one may need to include the trade association within a typology concerned with 'member' or 'not for profit' associations. New continua will be needed on which a broader range of associations may need to be placed.

A future study of the attitudes and values of individual professionals could investigate the significance of gender, a consideration which has been largely overlooked in studies of the professions.<sup>(106)</sup> There is some evidence (of relevance to 'business graduate' associations), for example, that women MBAs have different preferences as between different patterns of work than male MBAs.<sup>(107)</sup> The emerging 'alternative' patterns of work alluded to in Section 12.4 of this chapter have been particularly associated with women 'workers'.<sup>(108)</sup>

### 12.11 METHODOLOGIES AND TECHNIQUES FOR FURTHER STUDY

The purpose of this section is to review the methodologies and techniques used by the author (in the context of the study of professional associations) for the guidance of future researchers.

The chosen methodologies should result from the purposes of study. For example, a contemporary review of a relatively large number of professional associations might be preferable if the main purpose of study is to draw out lessons and implications for the future management of professional associations. Alternatively, to understand the process of professionalisation, it would be advisable to concentrate upon the examination of fewer associations over a longer period of time. Taking a relatively large cross-section of associations at different stages of professionalisation over a relatively short period of time is likely to be less satisfactory than tracing the evolution of a more limited number of associations through a number of stages over a longer period of time.

A future investigator whose focus of study is 'professionals' or 'professional practice' might be advised, in the light of the findings in chapter Twelve, to place a greater emphasis upon the community of professionals, patterns and structure of work, and the basis and requirements of multi-client work for fees, and less emphasis upon the 'institutional' aspects of professionalism, the professional associations.

The study suggests that, compared with 'semi-professions', the findings derived from 'ideal-type' professions are more likely to have applicability and relevance to other 'ideal-type' professions. The selection of 'matched pairs' (see Section 3.4 of Chapter Three) is less of an imperative in the case of the comparative study of 'ideal-type' professions as opposed to 'semi-professions'. The greatest justification for 'matched pairs' or 'matched sets' is where there are clear differences between associations grouped together on one or more dimensions to be investigated (see Section 12.9).

The validity and value of the status seeking and status maintaining distinction has already been considered in Section 12.9 of this Chapter. The use of this distinction for prior allocation of associations into status seeking and status maintaining categories for comparative purposes should be undertaken with caution when associations to be compared are of similar status and standing. If associations are to be categorised on the basis of a single 'indicator' rather than multiple indicators, one is likely to run an enhanced risk resulting from the possibility of selection of an unsatisfactory indicator.

Given the great mass of evidence that was collected, and the difficulties resulting from the need for consistency and the inclusion of all significant events in the employment of sampling techniques, the study was perhaps over-ambitious in terms of the number of hypotheses selected for study. Another researcher with more limited access to participant observation opportunities might have been less tempted to take advantage of them to test as many hypotheses as possible. It will be seen from Table 3.1 of Chapter Three that had the hypotheses been prioritised and fewer selected for examination, one could have tested, with the same commitment of time, a smaller number of hypotheses using three rather than two methods of evidence per hypothesis. Future investigators of professional associations testing similar hypotheses are advised to employ a minimum of two (and preferably three) categories of evidence per hypothesis.

The focus of this study has been upon members of the Councils of professional associations. In the light of the lessons of the study for the management of professional associations (see Chapter Fourteen), future investigators should consider complementing study of the values and attitudes of Council members with study of those of the membership at large, and of 'first line' executive management of professional associations. This is a particularly important consideration in the case of those associations which develop a more 'business' and less 'local authority' or 'committee' style of management, with an executive management team directly seeking to identify and satisfy the needs and interests of association members at large, rather than waiting for 'guidance' from the elected representatives of the membership.

A future investigator may need to pay more attention to the 'market' relationship between professional associations to be studied and their members and potential members (see Chapter Fourteen). It may be that the competence of a managerial team, the flexibility of organisation and the adequacy of management process will be more important determinants of continuing relevance and growth than whether or not certain 'traits' or characteristics of 'ideal-type' associations have been accumulated or achieved. In the case of the future study of 'semi-professions' it might be advisable to consider comparison with commercial organisations supplying services to professionals, but which made no claims to 'professional' status and have no desire to become professional associations.

The use of the questionnaire in the study of professional associations is considered in Sections 3.6 and 3.7 of Chapter Three. Where quantitative methods can be employed and consistency is desired across a large number of cases, and individual attitudes and values are to be tested, the use of the questionnaire is recommended. The author recommends the use of sampling techniques where large numbers of professionals are to be surveyed.

If undertaking the study again, the author would have distributed the individual questionnaire to all members of the first line management team of each of the associations selected for study and to a random sample of association members in order to judge how representative the views and attitudes of governing organ members were of those of members of association secretariats and memberships at large.

In repeating the study, in view of the relatively small population of governing organ members, the author would have telephoned and sought telephone or physical meeting completion of as many questions as possible from those who had not returned completed questionnaires. With hindsight the author would have also pressed more strongly for the circulation of the questionnaire to all members of the Council of one of the status maintaining management associations (IoD, BIM or ICSA) in order to allow a more balanced comparison with the 'IPR' questionnaires returned.



The use of interviews to collect evidence is considered in Section 3.8 of Chapter Three. The author, with hindsight, would recommend more structured interviews than those which took place, and the recording (perhaps by tape recorder) of the actual words used by all interviewees rather than just the 'outcomes' of discussion. At a later date, the precise form of words used in one situation or context rather than another can be revealing. The reporting of quotations can give a subsequent reader a 'feel' or insight that can be lost in a generalised summary.

There is also an argument (in the interests of consistency) for clustering interviews together, rather than holding them over an extended period. Inevitably the perspective of the interviewer will change as a study progresses. By holding interviews later rather than earlier in a study programme, their value as a complement to other forms of evidence is enhanced. The author would have benefitted from greater opportunity to fully digest and reflect upon questionnaire findings prior to commencing interviews.

Care needs to be taken, when a subset of a population only are interviewed, to ensure that those selected for interview are representative of the whole. Given a research design with significantly fewer hypotheses to test, it might have been advisable to hold a larger number of (if need be, shorter) interviews. Some positive selection of interviewees may be desirable where particular individuals and interests are 'influential'. Attention also needs to be paid to the timing of interviews. In order to ensure a sense of perspective, it may be advisable to schedule interviews on separate occasions from obvious interview opportunities such as just prior to, or just after, Council meetings. Proximity to such meetings can lead to an unrepresentative focus upon 'issues of the moment'.

An interviewer with an interest in a subject needs to be aware of the dangers of, and avoid, leading an interview discussion. Self-discipline is needed to remain detached and in the position of an observer rather than a discussion participant. It is also desirable to write up interview findings as soon as possible after completion of interviews.

Over a period of time an interviewer's own general views may colour the recollection, perception and interpretation of an interview. On occasion, there may be a case for paying a price in terms of loss of the benefits of informality, flexibility and 'ground covered' in order to formally record interviewee responses.

Almost all those who were interviewed requested that particular quotations should not be ascribed to them. The majority of interviewees granted interviews on the understanding that they were not to be quoted and that any formal record of their participation in the study should be limited to a record that the interview had taken place. Some interviewees however were happy that particular comments (taken by the author to reflect a general view and hence of illustrative value) should be recorded but not ascribed. A future researcher would be advised to seek greater freedom in the use of recorded material. Being able to support conclusions based upon a series of interviews with relevant quotations can facilitate the communication of findings.

It should be pointed out that in view of the restrictions imposed (and accepted by the author in the interests of open and frank discussion) the comments recorded during interviews and quoted in Chapters Seven to Eleven of Part II are given for the purposes of illustration only. The conclusions of the author in respect of each hypothesis derive from the interviews as a whole. It should be borne in mind that points made in individual interviews (and particular incidents in participant observer situations had their recording been allowed) do not necessarily reflect the views of members of Councils as a whole. In the course of a series of interviews (and participant observation) an assessment of the views of a Council as a whole may build up over a period of time.

The use of minutes as evidence is considered in Section 3.9 of Chapter Three. The extent to which minutes have been used in the study does not reflect the relative importance attached by the author to minutes at the end of the study. Given the range of 'meeting styles' and 'minuting practices' employed by different associations, this category of evidence proved to be of less value than had been foreseen, particularly in terms of consistency and comparability.

Although a documentary form of evidence, the wording of minutes inevitably reflect the views and perceptions of the person writing them.

Minutes are likely to be of most value as a record of events, activities and decisions, and of less value in seeking to understand the reasons for them, or in assessing underlying attitudes and values. Minutes can enable one to determine when significant debates and developments occurred. This can enable other methods of evidence collection to be focused upon such debates and developments. In the view of the author, the value of minutes is greatly increased when this form of evidence is complemented by participant observation.

In the study of professional associations, there may also be ethical and constitutional constraints to be considered relating to the use of minutes as evidence. The author obtained prior clearance from association secretariats at the commencement of the study (1978-80) of the use of minutes. In the case of all the associations studied, restrictions were placed upon their use, for example, the use of 'quotation' from minutes rather than reference to business transacted being disallowed, or the 'non-use' of the minutes of certain committees (eg disciplinary committee minutes) being requested. The author, in terms of the use to which the evidence from minutes was put to test hypotheses, was able to observe confidentiality, 'good practice' and explicit restrictions without undue compromise to the study. Future investigators are advised to draw up formal guidelines relating to such categories of evidence as minutes and participant observation.

In the case of both minutes and participant observation evidence, the author would have found it an advantage in writing up the findings of the study to have been able to include direct quotations. Such quotation can communicate an insight and a 'feel' that is lacking in an author's summary. When collecting and recording evidence, the author, if starting again, would have given greater consideration to the communication and presentation of research findings. The subsequent use of evidence material needs to be kept very much in mind as it is collected.

In the case of participant observation, the participant observer role of the author was accepted subject to the condition that the recording of individual comments of particular members of Council, or direct quotations of individual indicative incidents should not be made, and that any record arising from the privileged access of the author should be limited to their relevance regarding the testing of hypotheses. It was agreed that evidence obtained from the process of participant observation should only be used for the purposes of this study, and that this evidence should only be written up in summary form. A future researcher is advised to seek greater freedom in the use of participant observation evidence in order to support and facilitate the presentation and communication of findings.

The use of participant observation evidence is discussed in Section 3.10 of Chapter Three. In spite of the acknowledged methodological weaknesses of participant observation referred to in this section, the author found this category of evidence to be of greater value than was envisaged at the commencement of the study. In part this was the result of shortcomings that were found in other categories of evidence. Participant observation also provided an overview and perspective that was judged to be of value in interpreting other categories of evidence.

With the benefit of hindsight, the concentration in participant observation upon qualitative measures is thought by the author to have been justified. The use of quantitative assessment, involving numerical 'indicators' for only a proportion of the twenty-two hypotheses tested (in part) by participant observation, would have resulted in a need for continuous and systematic 'counting' and recording that would have inhibited qualitative assessment of other hypotheses.

In the case of those hypotheses involving an assessment of the degree of concern felt by a Council as a whole (eg Hypothesis xxix concerning peer body status self-consciousness) it was necessary to assess, by noting such indicators as 'nods and grunts', the extent to which expressions of views by individual Council members was representative of the opinions of Councils as a whole.

Unqualified numerical recording of such indicators as the number of times a topic was mentioned in Council discussion (possibly by an unrepresentative but persistent minority) could have led to misleading assessments.

In presenting the conclusions of participant observation in Chapters Seven to Eleven of Part II, the author would have benefitted from the use of 'recorded quotes' to give the reader a better 'feel' for this category of evidence. In view of the number of hypotheses to be tested, the author recorded the consequences of discussion over a series of meetings, rather than quotations of points made in discussion or indicative events. Consideration was given to the use of a tape recorder to record Council discussions. The author, while taking the view that general use of such recording would have an inhibiting effect upon discussion, considered that selective use could have allowed 'indicative events' to be recorded. In the event informal discussion with association secretariats suggested that not one association in the group of associations studied would be prepared to allow the author to tape Council sessions.

For a period, SCCA Council meetings were taped by the Secretary of the Society, and the tapes used as the basis for the production of council minutes. These tapes were disposed of once the minutes were written up and the author was not allowed access to them. A future researcher of professional associations is advised to consider the use of tape recording of appropriate meetings. such recording would 'free' the participant observer to concentrate upon such indicators as facial expressions indicating degree of assent that would not be recorded on audio tape. The use of video tape would allow such sources of evidence as 'body language' to be recorded but such recording is likely to be more difficult to arrange and could involve the 'intrusive' presence of a camera operator.

The value of participant observation evidence would have been enhanced by equal and concurrent access to the Councils of all of the associations studied. Greater and consistent participant observation access towards the end of the period of study and after the collection of questionnaire evidence would have been preferred.

Participant observation is demanding in terms of the burdens it places upon the observer. While drawn into and, to a degree, involved in what is being observed, the observer is required to maintain an objective detachment and systematically record what is taking place. Participant observations should be written up as soon as is possible in order to minimise the opportunity for selective or biased recall and interpretation.

Participant observation can be demanding of time if it is judged necessary to attend every one of a series of meetings. In the experience of the author, the playing of a significant role (eg Committee Chairman) during meetings can inhibit the process of participant observation.

While being a member as of right of a group that is being observed yields certain advantages in terms of background understanding and informed perspective of matters under discussion and, in some cases, personalities involved, there may also be costs in terms of detachment and objectivity. In the view of the author it is advantageous to be present throughout the whole of meetings being observed. The author would have obtained a more limited understanding of the associations under examination if he had been admitted only to certain meetings or 'public sessions', or excluded from 'important' or 'confidential' meetings, or portions of meetings.

Such is the value of participation observation for understanding the factors underlying, and the interplay of influences and considerations surrounding, the point at which decisions are made, that a future investigator without access to participant observation would be disadvantaged in seeking to understand such factors, influences and considerations. The selective articulation by participants some time after the events in question, and in the light of hindsight and perceived outcomes, particularly when given to third parties, can (in the experience of the author) be misleading.

It was observable that members of the governing organs of all the associations studied generally 'bent over backwards' to portray their associations in as favourable a light as possible. Given that these members behaved as trustees of the 'good reputations' of the associations studied, and were ever vigilant to protect their images and reputations, negotiation of participant observation access is advised in the case of hypotheses concerned with understanding the reasons why particular decisions occur and the underlying values involved.

Future investigators may not find it easy to negotiate participant observation access at Council level. Access of the author was cleared with the secretariats concerned, and was given on condition that there would be no individual attributions to, or direct quotations from, individuals present at meetings observed. An investigator able to secure the right to record and reproduce appropriate quotations would be at an advantage in writing up and communicating findings. Without the ability to record such quotations, one is inevitably forced to become more dependent upon relatively colourless generalisations, of whether or not hypotheses were supported in respect of the proceedings observed.

Participant observation needs to take place over a period that is sufficiently long to allow the observer to make due allowance for any biases that might result from different meetings practices, styles of conduct, forms of debate, and approaches to chairmanship among associations being compared. Where, for a particular association, these factors vary over time, care should be taken to ensure that the period during which participant observation occurs is representative of the period of study as a whole.

The use of 'publications' evidence is considered in Section 3.11 of Chapter Three. Although considerable effort was devoted to collecting this 'documentary' form of evidence, it proved, at the 'interpretation of evidence' stage, of less value than had been expected.

- While this category of evidence can establish that certain events and activities occurred, other than in the case of reviews, discussion documents and investigatory reports, such records of fact can give limited insight into the considerations and influences affecting, and reasons for, particular decisions. Publications, other than specifically commissioned surveys, can yield limited insight into values and attitudes.

Overall, as the study progressed the more 'objective' categories of evidence such as minutes and publications emerged as of more limited value than had been expected, while the more 'subjective' categories of evidence, particularly interviews and participant observation, emerged as of greater value than had been expected. The evidence derived from questionnaires proved as valuable as had been expected.

A technique not used in the study but which should (in the view of the author) be considered by future investigators is the group or 'panel' discussion. A 'panel' or group of Council members would constitute an informed group, the collective views of which (on certain issues to be investigated) might be less biased, and more representative, than the interpretations of a single observer. In the case of this study, a record of the views of such a group at annual intervals throughout the period of study, particularly on questions relating to attitudes and values, would have been of benefit.

While one should not collect evidence that is so voluminous that it cannot be properly digested and interpreted, in the time available, one should take care to collect sufficient evidence to allow some flexibility, such as an opportunity to revisit initial assumptions and assess some alternative formulations of hypotheses. With hindsight, the author could have recorded interview and participant observation differently in a way which would have facilitated selected testing of hypotheses using these categories of evidence across the whole group of associations, and outside of the constraints of 'matched pairs' and 'matched sets'.



The deficiencies in the evidence collected alluded to in this section, with a view to guiding future investigators of professional associations, are reflected in the degree of caution with which the findings are presented in Part III of this thesis. The next chapter examines the implications of the findings of the study (based upon this evidence) for the policies and practices of professional associations.

In summary, the assessed value of each of the research techniques employed in the study, in relation to the expectations of the author at the commencement of field research, is given in Table 12.6. In general (in a study with a significant emphasis upon attitudes and values) the more 'subjective' techniques exceeded expectation, while the more 'objective' techniques proved disappointing. It should be borne in mind, however, that the subjective techniques were employed by a researcher with greater familiarity with the research context and situation than might normally be the case.

TABLE 12.6Assessed Value of Research Techniques in Relation to Expectations

<u>Technique</u>	<u>Assessed Value in Relation to Expectations</u>
Participant Observation	Greater
Interview	Greater
Questionnaire	Same
Minutes	Lesser
Publications	Lesser

## CHAPTER THIRTEEN

### IMPLICATIONS FOR POLICIES OF PROFESSIONAL ASSOCIATIONS

#### 13.1 INTRODUCTION

This chapter identifies the implications of the findings of the study for the relative priorities and relative emphasis in the policies and related practices of the pairs and groups of professional associations that are the subject of the study. Its focus is upon strategic policy and (where relevant) related operational procedures. The chapter concentrates particularly upon those hypotheses with which the evidence collected in the period 1980-85 would appear to be consistent. It examines what is suggested by such 'supported' hypotheses and, given this 'support', what one would expect to happen in the period after 1985. Where further evidence is available for the period 1986-87 (after the conclusion of field research) a general, and largely qualitative and subjective, examination is undertaken of whether the expectations deriving from the study have been fulfilled. The chapter also identifies separately a number of developments relating to the educational and qualifying role of professional associations and the European Economic Community which are likely to have implications for and impact upon the policies of United Kingdom based professional associations.

Other findings of the study have implications for the policies and related practices of professional associations, if only as factors needing to be taken account of and considered by the governing organs of professional associations. These are set out in the various sections of Chapter Twelve dealing with the concept of the profession (Section 12.2) and trends and factors relevant to it (Section 12.3); the concepts and notions of the individual professional (Section 12.4), professionalism (Section 12.5), and the process of professionalisation (Section 12.6); issues arising out of the relationship between the professions and society (Section 12.7); the concept of professional status (Section 12.8), and the concerns of professional associations (Section 12.9).

Factors identified in Chapter Twelve which are particularly relevant to the policies and practices of professional associations include: the impact of new technologies, particularly information technology (Section 12.2); fragmentation of membership (and heterogeneity), external pressures from clients and employers, a turbulent environment, demands for more cost-effective services, threats to 'autonomy' and self-regulation, and the continuing importance of representational activity (Section 12.3); the emerging distinction between 'managerial' and 'knowledge' or 'professional' work, the evolution of new patterns of work, and the encroachment of the large corporation upon 'occupational control' (Section 12.4); the need for greater flexibility and adaptability (Section 12.6); and the challenges and opportunities of 'complexity', and the 'countdown' programme towards a single 'European market' by 1992 (Section 12.7).

Sections 13.2 to 13.4 of this chapter are based largely upon the findings (presented in Part III) relating to the thirty four hypotheses (see Section 2.7 of Chapter Two) used to operationalise the status distinction between associations which are 'status-seeking' and those which are 'status-maintaining'. The study (see Section 12.8 of Chapter Twelve) has confirmed the importance of status-seeking as a concern of professional associations<sup>(1)</sup>. It needs to be borne in mind, however, that while the study has confirmed that status is an element of professionalisation (Section 12.6 of Chapter Twelve), there are a number of other elements<sup>(2)</sup>.

Table 13.1 sets out for each group of associations the number of hypotheses, out of the total of thirty four, which appeared to have some support or validity in terms of consistency of evidence with them. It also gives the number of these hypotheses which have some support or validity (in terms of evidence consistency) only for one of the groups. It will be seen that over half of the hypotheses have some support in the case of the accounting associations, but less than a third and about a fifth in the case of the 'management' and 'business graduate' associations respectively.

**TABLE 13.1****Summary of Findings for All Hypotheses**

	<u>Number of Hypotheses Having Some Support or Validity in Terms of Evidence Consistency</u>	<u>Number of Hypotheses Having Some Support or Validity in Terms of Evidence Consistency only for the Group of Associations Indicated</u>
Business Graduate Associations	7	1
Accounting Associations	21	10
Management Associations	11	4

All the hypotheses in respect of which the evidence was consistent are considered in this chapter, as it is the view of the author that all of them have implications for the policies and practices of professional associations. The hypotheses having some support or validity (in terms of evidence consistency) in respect of the 'business graduate' associations are considered in Section 13.2, while the implications of 'supported' hypotheses for the 'accounting' and 'management' professions are considered in Sections 13.3 and 13.4 respectively.

### 13.2 BUSINESS GRADUATE ASSOCIATIONS

This section examines the implications of the specific findings of the study that relate to the policies and related practices of the BGA and BBGS. The 'expectations' that are referred to in Sections 13.2, 13.3 and 13.4 of this chapter relate to what one would expect to happen after 1985 on the basis of what is suggested by those hypotheses which the evidence collected in the period 1980-85 would appear to be consistent.

Overall seven hypotheses ( (i), (v), (viii), (xvii), (xx), (xxii), (xxxiii) ) or only a fifth of the total number of hypotheses tested appeared to have some support or validity, in terms of consistency of evidence with them, insofar as the Business Graduate Associations were concerned. Hypothesis (i) suggests that Council members of status-seeking associations tend to be of lower ranking class origins than Council members of status-maintaining associations. It is suggested that status-maintaining associations tend to be creators of knowledge while status-seeking associations tend to be reproducers of knowledge (hypothesis (v)). It is also suggested that Councils that perceive their associations as being relatively low in status are more likely to be concerned with encouraging members to volunteer assistance towards association activities (hypothesis (xx)), and with image issues (hypothesis (xxii)), and are more sensitive to both external confirmations of, and assessments of, their status (hypothesis (xxxiii)). Hypothesis (viii) suggests that status-seeking associations consciously seek links and joint ventures with higher status associations, while status-maintaining associations consciously seek to avoid links and joint ventures with lower status associations. Hypothesis (xvii) suggests that Councils of status-seeking associations which perceive a gap between an existing (and unsatisfactory) and a desired level or threshold of satisfactory status are likely to favour status-enhancing activity rather than a lowering of the 'target' level of status. Of these seven hypotheses only one hypothesis ((i)) appeared to have some support or validity only for the Business Graduate Associations.

The relatively low level of support for the business graduate associations as compared with the accounting associations, or even the management associations, raises the question of whether the BGA and BBGS should have been initially categorised as professional associations (see Section 12.9 of Chapter Twelve). A more appropriate classification might have been that of an occupational group made up of those in possession of vocational degrees in business studies.

Applying the 'hypothesis' findings firstly to the BGA, one would expect, other things being equal, the BGA, as compared with the BBGS to devote more effort to encouraging its members to undertake research activity and to put a lower priority upon and bringing to the attention of the membership educational type seminars and courses (hypothesis (v)); maintain a larger bureaucracy and a more formal organisation and more formal procedures (hypothesis (vii)); seek to avoid links and joint ventures with bodies perceived by the BGA Committee as relatively lower in status and, in particular, to react cautiously and with reservations to approaches from the BBGS (hypothesis (viii)); and be less concerned with formal and informal initiatives to encourage a flow of volunteers willing to assist BGA activities (hypothesis (xx))

In the eighteen months since the conclusion of field research the expectations derived from hypotheses (v), (vii), (viii) and (xx) have been fulfilled so far as the business graduate associations are concerned. The BGA has stressed the importance of research activity, to a greater extent than the BBGS, and has been able to continue to fund a full-time staff (including a new Director-General, Roger McCormick), while the BBGS operates on the basis of part-time and voluntary help<sup>(3)</sup>. The BGA has also continued to 'avoid' entering into arrangements with the BBGS, and it has been (unlike the BBGS) able to attract sufficient volunteers to continue with all its major programmes.



So far as their individual 'characteristics' are concerned, individual BGA Committee members are, compared with their BBGS counterparts likely to be: of relatively higher social class origins (hypothesis (i)); more likely to have followed a family vocational tradition (hypothesis (ii)); and likely to possess a more highly developed concept of professionalism (hypothesis (iv)).

The BGA Committee is likely, other things being equal, as compared with the BBGS Committee, to be more aware of external threats to its own status as an association and to the standing of the business graduate (MBA) in general (hypothesis (xii)). While the BBGS has been largely dormant in terms of activity in 1986-87, the BGA has been sufficiently aware of, and concerned with, issues that affect the future of management education to organise a major conference on the subject in 1987(4).

Turning, secondly, to the application of the 'hypothesis' findings to the BBGS, one would expect, on the basis of the findings of the study, other things being equal, the BBGS, as compared with the BGA to devote more effort to continuing to bring existing courses to the attention of its members rather than itself engaging in research and organising courses and other events (hypothesis (v)); maintain a smaller secretariat and operate with a less formal organisation and less formal procedures (hypothesis (vii)); consciously seek links and joint ventures with bodies perceived by the BBGS Committee as being relatively higher in status, including periodically the BGA (hypothesis (viii)); favour status-enhancing activity rather than a lowering of a target threshold of satisfactory status (hypothesis (xvii)); and be more concerned with formal and informal initiatives to encourage a flow of volunteers to assist BBGS activities, and, in particular to keep the BBGS Committee up to strength (hypothesis (xx)).

Recent events have been consistent with the expectations derived from the 'supported' hypotheses. By 1987 the BBGS no longer had the resources, or sufficient volunteers, to organise its own programme of activities. It continues to operate, largely informally, upon the basis of part-time and voluntary input. Considerable effort has been devoted to attracting 'volunteers'. In June of 1987, acknowledging that such efforts to attract 'volunteers' had not borne fruit, and that 'accommodation' with the BGA was unlikely, the BBGS entered into informal discussions with the BIM to explore the possibilities of absorption by the BIM(5).

So far as their characteristics are concerned, individual BBGS Committee members are, other things being equal, likely to be, compared with their BGA counterparts: of relatively lower social class origins (hypothesis (i)); less likely to have followed a family vocational tradition (hypothesis (ii)); and likely to possess a less highly developed concept of professionalism (hypothesis (iv)). By 1987, with the organisation of the BBGS reduced largely to a 'care and maintenance' basis, there were limited opportunities for members of the BBGS to develop a concept of 'professionalism' in the context of the BBGS.

The BBGS Committee is likely, other things being equal, as compared with the BGA Committee, to be less aware of external threats to its own status as an association and to the standing of the business graduate (MBA) in general (hypothesis (xii)). By mid 1987 the focus of the BBGS Council's concern was largely upon the prospects for the survival of the BBGS as an organisation. The threat to its existence largely derived from an internal lack of sufficient resources to sustain (let alone expand) the association. This overriding concern has resulted in less attention being paid to such 'external' considerations as the standing of the 'business graduate' in society.

The 'business graduate' associations were less concerned than the 'accounting' and 'management' associations with such issues as 'autonomy', 'self-regulation' and 'occupational control'. The growth of the involvement of the state education system in vocational education, to the extent that this resulted in an expansion of management education, was perceived by the BGA as an 'opportunity' rather than a 'threat'.

In the period 1986-87 there appeared to be renewal of public interest in 'management education'. This interest was stimulated in part by what have become known as the 'Handy'(6) and 'Constable'(7) reports. Both reports have called for a significant expansion in the number of British managers with a formal (MBA type) management qualification. The BGA Director-General, Roger McCormick was a co-author of the 'Constable' report(7). Subsequently, a 'Charter Group' of British companies has been formed to encourage the expansion of management education(8). To the extent that these activities increase the number of MBAs, the BGA is likely to face a larger pool of 'potential members' from which to recruit.

The BGA itself recognises the opportunity this 'interest' in management education has created(9). It is in the process of co-operating with other organisations (including the BIM) with a view to encouraging and facilitating the expansion of management education that is being called for(10).

The most practical strategic policy option for the BGA is likely to be a policy of 'co-operation' with other organisations (eg BIM, CBI, Foundation for Management Education, NEDO, Manpower Services Commission, Council for Management Education and Development, etc). The administration and organisation of the BGA is sufficient to allow it to play a role in the discussion of policy relating to the expansion of management education, but is likely to be insufficient (other than indirectly through the encouragement of contributions from its members) to significantly contribute to its expansion.

A further 'issue' with implications for the BGA is the question of gender<sup>(11)</sup>. Women MBAs have been members of the Committee of the BGA throughout the period of study. It is likely that in future women will play a more significant role in the management of the BGA than will be the case with the management of any other association studied<sup>(12)</sup>.

The BBGS has insufficient resources to play a significant role in debates concerning, and activities to expand, management education in the UK. The most practical strategic policy option open to the BBGS would appear to be to seek 'absorption' by the BIM<sup>(13)</sup>. As a consequence of such a development, it is conceivable that a 'business graduate' 'special interest' group could emerge within the BIM. The BIM has carried out periodic surveys of, and concerned with, MBAs<sup>(14)</sup>, and holders of the BIM's Diploma in Management Practice (introduced in 1987) who continue their studies to MBA level (possibly through a 'joint venture' that has been established between the BIM and the Open University) could be offered membership of such a 'special interest' group<sup>(15)</sup>. A consequence would be a blurring of the 'field of operation' distinction between 'business graduate' and 'management' associations.

### 13.3 ACCOUNTING ASSOCIATIONS

This section examines the implications of the specific findings of the study that relate to the policies and related practices of the ICA and SCCA. It looks at what was initially suggested by those hypotheses with which the evidence collected in the period 1980-85 appears to be consistent and examines the expectations for the period after 1985 that can be derived from these 'supported' hypotheses.

Overall 21 hypotheses ((ii), (iii), (v), (vii), (viii), (ix), (xi), (xiii), (xiv), (xv), (xvi), (xvii), (xx), (xxi), (xxii), (xxiii), (xxiv), (xxv), (xxix), (xxx), (xxxiii)) appeared to have some support or validity, in terms of consistency of evidence with them, in so far as the Accounting Association were concerned. This approximates to two thirds of the total number of hypotheses subjected to testing. Of these, 10 hypotheses ((ii), (iii), (xi), (xiii), (xvi), (xxi), (xxiii), (xxiv), (xxix), (xxx)), or approaching one third of the total number of hypotheses subjected to testing appeared to have some support or validity only for the Accounting Associations. A further four hypotheses (ix), (xiv), (xv), (xxv)) appeared to have some support or validity for the Accounting Associations and the Management Associations only.

Of the 21 'supported' hypotheses (in respect of which the evidence for the accounting associations is consistent) three ((ii), (iii), (xi)) concern the characteristics of individual members of Councils of professional associations. Hypothesis (ii) suggests that the Council professional self-recruitment rate (the extent to which children join the professional associations of their parents) of status-seeking associations is lower than that of status-maintaining associations, while according to hypothesis (iii) many status-seeking association Council members would ideally prefer to be members of a status-maintaining association. Hypothesis (xi) suggests that the individual search for attributes perceived as associated with status aspects of professionalisation are likely to be more explicit in the case of members of Councils that perceive their associations as relatively low in status.

Four of the 'supported' hypotheses concern association structure and behaviour ((v), (vii), (viii), (xxi)). Hypothesis (v) suggests that status-maintaining associations tend to be 'creators' of knowledge while status-seeking associations tend to be 'reproducers' of knowledge. Status-maintaining associations, according to hypothesis (vii), have larger bureaucracies and more formal organisations and procedures than status-seeking associations. Hypothesis (viii) suggests that status-seeking associations consciously seek links and joint ventures with higher status associations, while status-maintaining associations consciously seek to avoid links and joint ventures with lower status associations. According to hypothesis (xxi) Councils that perceive their associations as being relatively low in status devote a relatively higher proportion of their financial and full-time staff resources to activities concerned with the enhancement of status.

Another four of the 'supported' hypotheses relate to the concerns of association Councils with status ((xvi), (xxii), (xxix), (xxxiii)). These hypotheses suggest that Councils that perceive their associations to be relatively low in status are more concerned with status opinions of and recognition granted by Councils of higher status associations (xvi), are more concerned with image issues (xxii) and the opinions of peer associations (ie are more status self-conscious) (xxix), and are more sensitive to both external confirmations of and assessments of their status (xxxiii).

Five of the 'supported' hypotheses are concerned with the 'status drive' of association Councils and association activity to increase status ((ix), (xiii), (xiv), (xv), (xvii)). These hypotheses suggest that the search for status is a stronger motivator of further steps along the process of professionalisation (ix), the drive for standing, recognition, identity and self-respect is stronger (xiii), and the achievement of some form of state-recognition or additional form of state recognition is a higher priority objective (xiv), in the case of Councils that perceive their associations as relatively low in status. Hypothesis (xv) suggests that the contribution of significant new activities to questions of standing, recognition, authority and status is relatively more explicit and significant an element in the decision to proceed with them in the case of Councils that perceive their associations to be relatively low in status, while, according to hypothesis (xvii) such Councils which perceive a gap between an existing level of status and a desired status target or level of perceived satisfactory status favour status-enhancing activity rather than a lowering of a target threshold of satisfactory status.

Finally five of the hypotheses 'supported' for the accounting associations deal with the concerns of Councils other than explicitly status concerns ((xx), (xxiii), (xxiv), (xxv), (xxx)). These hypotheses suggest that Councils that perceive their associations as being relatively low in status exhibit a greater concern with formal and informal initiatives to encourage a flow of volunteers willing to assist association activities (xx), are more concerned with quantity of membership and recruitment of new member issues (xxiii), more concerned with the identification of VIP members within membership lists (xxiv), more concerned with the extent to which members make explicit and acknowledge their memberships (ie appear publicly to use and to quote their qualifications in the case of a qualifying association) (xxv), and are less likely to exhibit concern regarding active two-way communication with members (xxx).

In the case of the accounting associations the relatively large number of hypotheses (approaching two-thirds) for which the evidence is consistent is supportive of the view that these associations (ICA and SCCA) conform to a greater extent than do the management and 'business graduate' associations to the traditional concept of a professional organisation.

Applying the 'hypothesis' findings to the ICA, one would expect, other things being equal, the ICA, as compared with the SCCA to play a more central role in the creation of knowledge and development of accounting practice and techniques (hypothesis (v)); to maintain a larger secretariat and a more formal organisation, and to operate more formal procedures (hypothesis (vii)); to exercise extreme caution in respect of approaches from and to avoid links and joint ventures with associations perceived by the ICA Council as relatively lower in status (eg non-CCAB or 'second tier' associations) (hypothesis (viii)); and be less concerned with taking further steps (where and assuming such steps could be identified and defined) along the process of professionalisation (hypothesis (ix)) and to be more satisfied with the level of standing, recognition, identity and self-respect it has achieved (hypothesis (xiii)). The author is not aware of any significant evidence during the period 1986-87 that is inconsistent with these expectations derived from the 'supported' hypotheses.

One would also expect the ICA, as compared with the SCCA, to be more satisfied with the level of state-recognition it has achieved (hypothesis (xiv)); less concerned with formal and informal initiatives to encourage a flow of volunteers willing to assist ICA activities and more likely to assume that in the normal course of events a sufficient number of volunteers will come forward (hypothesis (xx)); and to devote a relatively lower proportion of ICA financial and full-time staff resources to activities concerned with the enhancement of ICA status (hypothesis (xxi)). Since the conclusion of field research in 1985, there is some evidence that, while elections to the ICA Council continue to be contested, senior partners of the larger London-based practices are increasingly reluctant to volunteer themselves for such election(16).



Otherwise the author is not aware of any evidence from the period 1986-87 that is inconsistent with the expectations derived from these hypotheses.

One would expect the ICA, as compared with the SCCA, to be less likely to exhibit status insecurity and to be concerned with association image issues (hypothesis (xxii)); less concerned with quantity of membership and recruitment of new member issues (hypothesis (xxiii)); and less concerned with the identification of VIP members within membership lists (hypothesis (xxiv)). The only evidence the author has uncovered in the period 1986-87 inconsistent with these expectations derived from the 'supported' hypotheses relates to hypothesis (xxii) and image issues. There would appear to be a high level of concern within the ICA regarding the public image of the 'chartered accountant' and the ICA(17).

Continuing, in the order in which the hypotheses were formulated, one would expect the ICA, as compared with the SCCA to be less concerned with the extent to which members make explicit and acknowledge their ICA membership (hypothesis (xxv)); less concerned with the opinions of peer bodies (hypothesis (xxix)); more likely to exhibit concern regarding active two-way communication with members (hypothesis (xxx)); and to question to a lesser degree the effectiveness of promotional activity (hypothesis (xxxiv)). Evidence since the end of the period of field research (1985) has been largely consistent with these expectations derived from the 'supported' hypotheses. The ICA is, however, as a result of Government pressure, having to take more account of the opinions of peer bodies (re hypothesis (xxix))(18). The consequences have been apparent in a desire for greater member involvement (re hypothesis (xxx)) in the discussion of the issue of closer co-operation with other accounting associations(19).

So far as their characteristics are concerned, other things being equal, ICA Council members are likely to be, as compared with SCCA Council members more likely to follow a family professional tradition (hypothesis (ii)); less likely to express a preference for membership of another association (hypothesis (iii)); while their search for attributes perceived as associated with status aspects of professionalisation is likely to be less explicit (hypothesis (xi)). One issue, relating to future ICA Council membership, arises from the growing proportion of women among those who are qualifying as 'professional' accountants, namely the likely impact upon Council attitudes and values of a significantly higher proportion of women members<sup>(20)</sup>.

Other things being equal and, as compared with the SCCA Council, the ICA Council is likely to exhibit marginally greater awareness of external threats to the established status of the Institute and the recognised accounting profession (hypothesis (xii)); less likely to be concerned with status opinions of and recognition granted by Councils of other associations (hypothesis (xvi)); and likely to be less sensitive to both external confirmations of and assessments of their status (hypothesis (xxxiii)). Recent evidence is consistent with these expectations except that in respect of hypothesis (xvi), the ICA needs to take account of the views and opinions of the Councils of other 'recognised' (CCAB) accounting associations as a consequence of external pressures<sup>(21)</sup>.

Other things being equal and as compared with the Council of the SCCA, the contribution of significant new activities to questions of standing, recognition, authority and status is likely to be less explicit and less significant an element in the decision to proceed with them in the case of the ICA Council (hypothesis (xv)). The author is not aware of any evidence from the period 1986-87 inconsistent with this expectation.

Turning now to the application of 'hypothesis' findings to the SCCA, one would expect, other things being equal, the SCCA, as compared with the ICA to be a follower rather than a leader in the creation of the theory and practice of accounting (hypothesis (v)); maintain a smaller secretariat and less formal organisation and procedures (hypothesis (vii)); continue to seek links and joint ventures with associations that are of equivalent or higher status, including, periodically, those with the Association of International Accountants in an effort to rationalise and consolidate the non-CCAB profession (hypothesis (viii)); and be more concerned with taking further steps along the process of professionalisation (hypothesis (ix)). Evidence in the period 1986-87 is largely consistent with these expectations derived from the 'supported' hypotheses except that, in respect of hypotheses (viii) and (ix), the SCCA is not pursuing 'merger negotiations' in order to concentrate upon the task of establishing its special competence in respect of the needs of the smaller business<sup>(22)</sup>.

One would also expect the SCCA, as compared with the ICA, to exhibit a stronger drive for standing, recognition, identity and self-respect (hypothesis (xiii)); put a higher priority upon the achievement of some form of state-recognition or additional form of state-recognition (hypothesis (xiv)); and favour status-enhancing activity to raise the Society's status rather than lowering the Society's status expectations (hypothesis (xvii)). While evidence in the period 1986-87 remains consistent with these expectations, derived from the 'supported' hypotheses, it would appear that the 'drive' of the SCCA for status and recognition has become more 'realistic' and focused upon the establishment of a role relating to the needs of the smaller business<sup>(22)</sup>.

One would expect, continuing in the order in which the hypotheses were formulated, the SCCA, as compared with the ICA, to be more concerned with formal and informal initiatives to encourage a flow of volunteers willing to assist the Society's activities (hypothesis (xx)); devote a relatively higher proportion of SCCA financial and full-time staff resources (in particular the time of the chief administrative officer) to activities concerned with the enhancement of the Society's status (hypothesis (xxi)); exhibit status-insecurity and to be more concerned with image issues (hypothesis (xxii)); and be more concerned with quantity of membership (and in particular the ageing and falling SCCA membership) and recruitment of new member issues (hypothesis (xxiii)). The author is not aware of any significant evidence in the period 1986-87 that is inconsistent with these findings, derived from the 'supported' hypotheses, except for the consequences of the concern of the ICA (already alluded to) with image issues as they affect expectations deriving from hypothesis (xxii).

One would also expect the SCCA, as compared with the ICA to be more concerned with the identification of VIP members within membership lists (hypothesis (xxiv)); more concerned with the extent to which SCCA members make explicit and acknowledge their Society membership (hypothesis (xxv)); more concerned with the opinions of peer bodies (hypothesis (xxix)); less likely to exhibit concern regarding active two-way communication with members (hypothesis (xxx)); and likely to question to a greater degree the effectiveness of promotional activity (hypothesis (xxxiv)). So far as this group of hypotheses are concerned, the author has not, since 1985, had access to sufficient evidence to judge whether these expectations, derived from the 'supported' hypotheses have been met in the period 1986-87.

So far as their characteristics are concerned, other things being equal, SCCA Council members are likely to be, as compared with ICA Council members less likely to follow a family professional tradition (hypothesis (ii)); more likely to express a preference for membership of another association (hypothesis (iii)); while their search for attributes perceived as associated with status aspects of professionalisation is likely to be more explicit (hypothesis (xi)). Again, the author has not had access to sufficient evidence to judge whether these expectations, derived from the 'supported' hypotheses have been met in the period 1986-87.

Other things being equal and, as compared with the ICA Council, the SCCA Council is likely to exhibit marginally less awareness of external threats to the status of the Society and the accounting profession in general (hypothesis (xii)); be more concerned with status opinions of and recognition granted by Councils of other associations perceived as higher in status, particularly members of the CCAB (hypothesis (xvi)); and be more sensitive to both external confirmations of and assessments of their status (hypothesis (xxxiii)). It would appear that, in the period 1986-87, the SCCA has become more 'informed' and 'realistic' in its assessment of external threats and opportunities (re hypothesis (xii)) and that in its dealings with other accounting associations (re hypotheses (xvi) and (xxxiii)) is seeking to establish itself as a 'complement' rather than as a 'competitor', as a result of its increasing focus upon the needs of the smaller business<sup>(23)</sup>.

Other things being equal and as compared with the Council of the ICA, the contribution of significant new activities to questions of standing, recognition, authority and status is likely to be more explicit and more significant an element in the decision to proceed with them in the case of the SCCA Council (hypothesis (xv)). The contribution of new activities to the establishment of a distinct role for the SCCA in relation to the smaller business is emerging as the single most important element<sup>(23)</sup>.

In the eighteen months since the conclusion of field research the expectations derived from the hypotheses supported by the evidence collected in respect of the accounting associations have been largely fulfilled (to the extent that the author has been able to judge) in circumstances in which the consequences of these expectations are visible.

Deregulation in the area of financial services, with associated new regulatory mechanisms, pose a particular threat to the 'autonomy' and self-regulation of the accounting profession, while financial institutions themselves increasingly pose a competitive threat to individual association members in the area of the provision of certain services<sup>(24)</sup>.

Other issues concerning professional status relate particularly to the future nature of professional accountancy practise. A number of questions need to be considered by the governing organs of professional accounting associations. These include whether professional firms should be able to incorporate as limited liability companies and accept 'outside' shareholders<sup>(25)</sup>; whether mixed professional partnerships (ie lawyers, estate agents, etc joining with accountants) or professional services companies should be allowed to offer through a single organisation a wider range of professional services and whether professional practise should be focused more narrowly with, for example, professional accounting firms required to dispose of management consultancy practices in order to avoid conflicts of interest<sup>(26)</sup>.

Accountants in public practice (and the ICA) are also likely to face more demanding 'customers' or clients in the 'market-place' (see Chapter Twelve). The traditional and relatively 'secure' provision of auditing services is becoming increasingly 'competitive' as companies demand 'value for money' and have become more willing to change their auditors(27). In response, professional firms are beginning to claim that benefits can arise from auditing beyond the satisfaction of a statutory requirement(28). In view of its significance, and the relatively public nature of the challenges it faces, it is possible that, of all the associations studied, the ICA may need to take up more public positions on key issues. Towards the end of 1987 another established profession, the medical profession (ie Royal Colleges) appeared increasingly willing to take public positions in support of its representations to Government(29).

The emergence of informal initiatives, originating from the ICA, to integrate the accounting profession poses a particular problem for the SCCA(30). The consequence of such integration would be to further entrench the predominant position of the ICA among the associations selected for study and increase the status and standing gap between it and the SCCA.

The internal organisation of the ICA appears, in the main, adequate to cope with the challenges it faces. Members of its secretariat may, however, need to become more used to working in co-operation with their counterparts in the secretariats of other associations in the membership of the CCAB. Members of the ICA secretariat are likely also to become more involved in the monitoring of the activities of members(31).

The main defect in the internal organisation of the SCCA concerns its staff rather than its procedures. It relates to the Society's ability to monitor legislative and technical developments concerning its emerging area of specialisation, namely the smaller business. To a limited extent the deficiency in terms of the lack of internal staff resources, is likely to be made good through the use of the volunteered services of members. Some more permanent arrangement, involving the recruitment of technically qualified staff, is necessary, however, if the Society is to make authoritative representations and meet the technical updating needs of its members and their clients.

The key policy issue for the ICA appears to be the question of the structure of the accounting profession and 'co-operation' with other members of the CCAB. Policy responsibility, in respect of accounting issues and the 'accounting' profession, is likely to be increasingly shared with other associations, regulatory authorities and Government. The most practical policy option is, therefore, likely to be a policy of 'accommodation' (if not active 'co-operation') based upon maintaining the 'established' standing of the ICA and drawing authority from the size of its membership.

The most practical policy option for the SCCA would appear to be to establish a special role for the Society in relation to the needs of the smaller business. Such a role could become more viable if auditing requirements for the smaller company were relaxed, a development which has some support within the membership of the ICA<sup>(32)</sup>. There are, however, other interests opposed to such developments which could lead to formal 'recognition' of 'different kinds of accountants', and the SCCA could face opposition from other associations in the achievement of a more practical and relevant role<sup>(33)</sup>. If a distinct role for the SCCA is not established its longer term survival will be open to question.



#### 13.4 MANAGEMENT ASSOCIATIONS

This section examines the implications of the specific findings of the study that relate to the policies and related practices of the IOD, BIM and ICSA, and the IM, CAM and IPR. It looks at what was initially suggested by those hypotheses with which the evidence collected in the period 1980-85 appears to be consistent and examines the expectations for the period after 1985 that can be derived from these 'supported' hypotheses.

Overall 11 hypotheses ((v), (vii), (viii), (ix), (xiv), (xv), (xvii), (xx), (xxii), (xxv), (xxxiii)) or about a third of the total number of hypotheses subjected to testing appeared to have some support (if not conclusive) or validity, in terms of consistency of evidence with them, in so far as the Management Associations were concerned. Of these, five hypotheses ((vii), (ix), (xiv), (xv), (xxv)) appeared to have some support or validity only for the Management Associations and the Accounting Associations. No hypothesis appeared to have some support or validity for the Management Associations alone.

Six of the eleven hypotheses are 'supported' by all three groups of associations (ie business graduate, accounting and management). Hypothesis (v) suggests that status-maintaining associations tend to be 'creators' of knowledge within professions while status-seeking associations tend to be 'reproducers' of knowledge. Hypothesis (viii) suggests that status-seeking associations consciously seek links and joint ventures with higher status associations while status-maintaining associations consciously seek to avoid links and joint ventures with lower status associations. Hypothesis (xvii) suggests that Councils of status-seeking associations perceiving a gap between an existing level of status and a desired 'target' or threshold level of satisfactory status, favour status-enhancing activity rather than a lowering of the status 'target'. It is also suggested that status-seeking associations exhibit greater concern with formal and informal initiatives to encourage a flow of volunteers willing to assist association activities (hypothesis (xx)), are more concerned with image issues (hypothesis (xxii)), and are more sensitive to external confirmations of, and assessments of, their status (hypothesis (xxxiii)).

Turning to the five hypotheses 'supported' in the case of both the 'management' and the 'accounting' associations, hypothesis (vii) suggests that status-maintaining associations have larger bureaucracies and more formal organisations and procedures than status-seeking associations. It is also suggested that 'status-seeking' associations are motivated to a greater degree by the search for status in respect of further steps along the process of professionalisation (hypothesis (ix)), put a higher priority upon the achievement of some form of state recognition or additional form of state recognition (hypothesis (xiv)), put more importance upon questions of standing, recognition, authority and status during the consideration of new activities (hypothesis (xv)), and are more concerned with the extent to which members make explicit and acknowledge their association memberships (hypothesis (xxv)).

Compared with the accounting associations, the evidence collected in respect of the management associations only supports about a half of the number of hypotheses (eleven compared with twenty one). This outcome provides some support for the classification of the management associations as different in kind from the accounting associations, for example, as 'semi-professions'. In the view of the author 'semi-profession' categorisation is more appropriate to the status seeking (IM, CAM and IPR) than the status maintaining (ICSA, IOD and BIM) associations in the management group. The latter sub-set could be said to possess rather more of the 'traits' associated with full traditional profession status, particularly in the case of ICSA.

One would expect, on the basis of the findings of the study, other things being equal, the IOD, BIM and ICOSA, as compared with the IM, CAM and IPR to have larger and more capable secretariats but not more formal organisations or more formal procedures (hypothesis (vii)); to consciously receive with caution approaches regarding links and joint ventures from associations perceived as of lower status and to prefer (as with IM, CAM and IPR) links and joint ventures from associations perceived as of equivalent status (hypothesis (viii)); and to be less motivated by the search for status in regard to further steps along the process of professionalisation (hypothesis (ix)). Evidence encountered in the period in 1986-87 has been largely consistent with these expectations derived from the 'supported' hypotheses. In respect of hypothesis (vii) it should be noted that in its 1987 financial year, for the first time, the IM's total employment costs exceeded one million pounds and the number of its employees rose to 108<sup>(34)</sup>. In terms of the scale of its secretariat the IM now broadly 'matches' the scale of the BIM and ICOSA bureaucracy, and is in a different order of magnitude to the far more modest secretariats of CAM and the IPR.

Continuing, in the order in which the hypotheses were formulated, one would expect the IOD, BIM and ICSA, as compared with the IM, CAM and IPR to put a lower priority upon the achievement of some form of state-recognition or additional form of state-recognition (hypothesis (xiv)); exhibit less concern with formal and informal initiatives to encourage a flow of volunteers willing to assist association activities (hypothesis (xx)); be less concerned with image issues (hypothesis (xxii)); and be less concerned with the extent to which members make explicit and acknowledge their memberships (hypothesis (xxv)).

Evidence in the period 1986-87 is consistent with the expectations for hypothesis (xiv) in respect of the IPR, which is positioning itself for a Royal Charter application, and the IM, which has an application for a Royal Charter in progress<sup>(35)</sup>. It is not, however, consistent with this hypothesis in the case of the BIM which is also positioning itself for a Royal Charter application<sup>(36)</sup>.

In the period 1986-87 (re hypothesis (xx)) all the management associations engaged in activities designed to encourage a flow of volunteers. Similar activities were undertaken by associations in both 'status-seeking' and 'status-maintaining' categories. For example, the IM sought volunteers for a register of marketing lecturers<sup>(37)</sup>, while over 900 BIM members responded (by mid-December 1987) to an appeal for volunteers to serve as Tutors and Senior Tutors in support of the BIM's new Diploma in Management Practice<sup>(38)</sup>.

Other things being equal, and as compared with the governing organs of IM, CAM and IPR, the IOD, BIM and ICSA governing organs are less likely to be concerned with status opinions of and recognition granted by Councils of other associations, including those perceived as higher in status (hypothesis (xvi)); while the contribution of significant new activities to questions of standing, recognition, authority and status is likely to be less explicit and less significant an element in the decision to proceed with them (hypothesis (xv)). Evidence encountered in the period 1986/87 has been largely consistent with these expectations derived from the 'supported' hypotheses. An 'exception' could emerge from the circumstances surrounding the 'positioning' of the BIM for Royal Charter status<sup>(39)</sup>.

One would expect, on the basis of the findings of the study, other things being equal, the IM, CAM and IPR, as compared with the IOD, BIM and ICOSA to have smaller and more limited secretariats but organisations and procedures that are not necessarily less formal (hypothesis (vii)); consciously seek links and joint ventures with associations perceived as of equivalent status (and, in some instances, of relatively higher status) (hypothesis (viii)); and be more motivated by the search for status in regard to further steps along the process of professionalisation (hypothesis (ix)). Evidence encountered has been largely consistent with these expectations with the exceptions, already noted, of the 'positioning' of the BIM for Royal Charter status (re hypothesis (ix)) and the growing size of the IM secretariat<sup>(40)</sup>.

Continuing, in the order in which the hypotheses were formulated, one would expect the IM, CAM and IPR, as compared with the IOD, BIM and ICOSA to put a higher priority upon the achievement of some form of state-recognition or additional form of state-recognition (hypothesis (xiv)); favour status-enhancing activity rather than a lowering of status aspirations or of a target threshold of perceived satisfactory status (hypothesis (xvii)); exhibit a greater concern with formal and informal initiatives to encourage a flow of volunteers willing to assist association activities (hypothesis (xx)); be more concerned with image issues (hypothesis (xxii)); and be more concerned with the extent to which members make explicit and acknowledge their memberships (hypothesis (xxv)). The evidence encountered in the period 1986/87 has been largely consistent with these expectations derived from the 'supported' hypotheses. In respect of hypothesis (xiv) one needs again to note one significant development since the conclusion of field research at the end of 1985, namely the decision of the BIM Council to position the BIM for an application for Royal Charter status<sup>(41)</sup>.

Other things being equal, and as compared with the governing organs of IOD, BIM and ICSA, the IM, CAM and IPR governing organs are likely to be more concerned with status opinions of and recognition granted by Councils of other associations perceived as higher in status (hypothesis (xvi)); while the contribution of significant new activities to questions of standing, recognition, authority and status is likely to be relatively more explicit and more significant an element in the decision to proceed with them (hypothesis (xv)). The author did not have access to the evidence needed to judge whether or not these expectations, deriving from the 'supported' hypotheses, were met in the period 1986-87.

Compared with the accounting and business graduate associations, the visible and explicit evidence relating to expectations derived from 'supported' hypotheses is less clear cut in the case of the management associations.

The administration and organisation of the IOD and ICSA appear adequate for the roles they are undertaking, or are seeking to undertake. In the case of ICSA, following an internal debate on policy options, a four year strategic policy in the form of a 'corporate plan' has been agreed and articulated, representing the most detailed and comprehensive forward plan of any of the 'management' associations<sup>(42)</sup>. In contrast the publicly articulated objectives of the IOD largely relate to its representational role<sup>(43)</sup>. Its most practical strategic policy option may well be to seek to achieve these objectives.

The administration and organisation of three 'management' associations, BIM, IM and IPR will need to accommodate to changes resulting from the decisions of their Councils to position these organisations for Royal Charter status. In the case of all three associations the key strategic policy decision to seek 'chartered' status has been taken and the implications of these decisions will increasingly impact upon their organisations<sup>(44)</sup>. Constitutional and procedural changes are an inevitable consequence of the decision to seek 'chartered' status, as a Charter and bye-laws will need to be written in a form acceptable to the Privy Council<sup>(45)</sup>.

The administration and organisation of the IM, BIM and IPR, supplemented as appropriate by external professional and specialist expertise, should, in the view of the author, be adequate to the task of positioning these associations for chartered status. However, the relatively small IPR secretariat could well be stretched, and the BIM secretariat is likely to face a heavy workload following the launch in late 1987 of a number of new initiatives which will need to be implemented in parallel to the positioning for Royal Charter Status<sup>(46)</sup>.

The remaining 'management' association, CAM, faces the most uncertain future of any 'management' association. The administration and organisation of CAM currently reflects the consequences of a strategic review of its operations concluded in 1985 which has largely limited its role to that of an examining body<sup>(47)</sup>. CAM's freedom of action is limited through its constitution by the presence of representatives of its Constituent Organisations on its governing body (see Sections 6.6 and 6.7 of Chapter Six). Its strategic policy options could well be limited to reacting to, and accommodating to, the strategic policy choices of its Constituent Organisations. Were the IPR, as a consequence of its positioning of itself for Royal Charter status, to develop an examining role, the continued existence of CAM could once again become open to doubt.

The strategic policy options for each association studied which, in the view of the author, are most practical, and most likely to occur, are summarised in Table 13.2. The table is based upon the author's conclusions presented in Sections 13.2, 13.3 and 13.4 of this chapter. Also in Table 13.2 is the author's view of whether the most likely strategic policy choice for each association can be categorised as 'maintaining' an existing strategic status position or as 'seeking' after an enhanced strategic status position.

TABLE 13.2

Association Strategic Policy Choices

<u>Association</u>	<u>Strategic Policy</u>	<u>Strategic Categorisation</u>
BGA	Co-operation with other 'recognised' associations while preserving own standing	Maintaining
BBGS	Absorption, preferably by BIM	Maintaining
ICA	Accommodation to Government pressures and co-operation with other CCAB bodies while preserving 'leadership' position	Maintaining
SCCA	Establish a distinct role re the smaller business	Seeking
IOD	Achieve representational objectives while retaining authority	Maintaining
BIM	Achieve Chartered Status while implementing management education and development strategy	Seeking
ICSA	Implement Corporate Plan 1988/92	Maintaining
IM	Achieve Chartered Status and develop educational role	Seeking
CAM	Continue existence as an examining body	Maintaining
IPR	Achieve Chartered Status through growth and education role	Seeking



The BIM, categorised in this study as a status-maintaining association, is categorised in Table 13.2 as 'seeking' in terms of its strategic policy, in that it is seeking formal recognition through Royal Charter Status of its established and developing role. Both the BBGS and CAM, categorised in this study as status-seeking associations, are categorised in Table 13.2 as 'maintaining' in terms of their strategic policy, as circumstances (and greater realism) have largely caused them to lose their aspirations of a significant enhancement to their status in the next few years.

### 13.5 EDUCATION AND QUALIFYING ROLE

Developments in the educational roles of individual associations were considered in Sections 13.2, 13.3 and 13.4 of this chapter. This section examines some of the implications of the general findings of the study for the policies (and, where appropriate, related practices) of the professional associations examined that relate to their education and qualifying roles. Millerson considered qualification as the key to 'professionalisation'(48).

The existence of a knowledge base appears to continue to be important to the professional association. Skill based upon theoretical knowledge and specialised training and education with association examination and demonstration of competence have traditionally been regarded as distinguishing characteristics of the professions(49). The renewal of interest over the period 1986-87 in the area of management education and training on the part of the 'business graduate' and 'management' associations provides some justification for the tendency of earlier studies of professional associations to focus upon this aspect of their activities(50). The decisions of the BIM, IM and IPR Councils to position their associations for chartered status has resulted in a re-examination of their educational roles (see Section 13.4 of this chapter).

It is significant that as the IPR appeared to become increasingly professionally self-aware, so it became more concerned with the definition of its own field of knowledge. During the period of the study the 'profession' of public relations secured academic recognition to the extent that, with the support of the IPR, the first lecturer in the UK at a degree awarding institution was appointed and the first degree course in the UK specialising in public relations was established at the Cranfield Institute of Technology.

With a growing acknowledgement of the need for continued re-education and updating<sup>(51)</sup>, and the increasing assumption of this role 'in-house' by larger companies, one could envisage professional associations offering relatively standard and general courses, while finding it increasingly difficult to justify attendance on their specialist courses and satisfy the growing needs of an increasingly varied population of companies for flexible courses that are relatively more tailored to their distinct needs and particular circumstances. The BIM Diploma in Management Practise is designed to meet a general 'in company' need for particular skill based modules<sup>(52)</sup>.

To accommodate a greater variety of demands and requirements, professional associations may need to offer more grades of membership (eg technician and/or affiliate grades), a larger range of subject options, greater flexibility in study arrangements and further specialist qualifications<sup>(53)</sup>. Specialist and post-qualification education could be offered to other than association members (eg holders of academic qualifications).

Professional associations are likely to need to come to some accommodation with academic qualifications that are vocationally oriented. An example is the BIM's arrangement with the Open University which will offer students a programme leading to Diplomas of both the BIM and the Open University<sup>(54)</sup>. This form of accommodation and arrangement may result in greater attention to such matters as transfer arrangements and exemptions; joint ventures; development and maintenance of standards; distance (and other 'new' methods of) learning; post-qualification education; professional updating; short courses; specialist education; monitoring; library and information resources; conferences, and information services.

A traditional distinguishing mark of the professional association has been the acceptance of a responsibility for providing continuing education and professional updating. The formation of subject or vocational associations-along the lines of the BGA and BBGS, or the assumption of this responsibility vis-a-vis graduates and other holders of academic qualifications by alumni associations, or even universities themselves, could further blur the distinction between professional and academic qualifications.

As academic qualifications become more practical, and relevant and work experience modules are introduced (eg in company sandwich placements, student projects, etc), while professional qualifications, without continuing education and professional updating, become regarded as having a definite 'shelf life', then the differences between professional and academic qualifications may become blurred.

Both academic and professional qualifications relating to the same subject and work area may claim to be vocational. Academic and professional qualifications may in future compete to a greater extent than has hitherto been the case in respect of method of study (full-time/part-time, residential/non-residential, distance learning/evening study options); period of study; availability of finance; recognition of qualification; availability of exemptions/base vis-a-vis other qualifications /further study; course content; knowledge and skill requirements and development; post-qualification services; practical relevance of course/studies, and practical training/work experience elements.

Generalist professional qualifications may in future find they are in increasing competition with general and vocationally oriented academic qualifications. Greater opportunity for full-time study and easier access to finance (eg student grants) may favour the academic qualification.

The contending pressures for generalism and specialism could be accommodated by professional associations by requiring an initial generalist qualification of all those entering a particular professional area, while further specialist qualifications and associated updating could be required for areas of specialist practise.

With 'quality' and other 'company-wide' programmes reaching every employee, associations will need to be alert to the challenges of 'de-professionalisation'(55). As elements of specialist skills become the property of all members of an employment group it may become more difficult to justify particular professional roles. 'De-professionalisation' of the medical profession has been advocated by Friedman for some fifteen years(56).

It should be noted that in addition to greater competition from more market oriented 'state' vocational education institutions, professional associations may face competition in their 'educational' roles from new forms of commercial organisation set up to provide services to 'professionals'. An example of such an approach operated on a 'collective' basis in Xanadu Limited set up to provide a range of common services to former employees of Rank Xerox who have established their own businesses(57). These new 'commercial' competitors may define 'professional' in terms of the needs of those adopting a particular mode and pattern of work, rather than in terms of a post 'qualification' route and membership of a professional association.

'Knowledge' workers are likely to have 'needs' that are distinct from those working 'managerially'(58). A professional or 'knowledge' worker operating as an independent contractor or 'networker' could well satisfy the definition of a professional as 'a person capable of applying special theoretical knowledge or insight in cases where objective and impartial judgement of both needs and appropriate responses is called for'(59), independently of membership of a professional association.

The traditional notion of life-career expectations among young professionals(60) also needs to be reassessed in the light of the findings of the study (see Section 12.4 of Chapter Twelve). The professional association may need to redefine its role in terms of providing services to knowledge workers at appropriate points and stages in their careers, rather than the 'traditional' role of equipping them for a lifetime of practice.

The emergence of new patterns of work, a growing requirement for functional flexibility and teamworking skills on the part of those in traditional employment could further erode the competitive position of professional associations in the educational role, particularly those associations that have a relatively narrow expertise or skill base<sup>(61)</sup>. There is some evidence, in the case of non-educational services, that those who adopt a 'professional' mode of work in terms of remuneration by fee for a service based on a distinct competence to a number of clients, are themselves able and willing to bring into existence new organisations to meet their collective needs<sup>(62)</sup>.

### 13.6 THE PROFESSIONS AND EUROPE

Completion of the internal market is likely to have significant implications for members of all of the professional associations studied<sup>(63)</sup>. More associations are likely to evolve a specifically European policy (see Section 12.8 of Chapter Twelve). To date progress in this direction has been limited although some attempts have been made to establish the parameters and factors which should be taken into account in formulating a European policy<sup>(64)</sup>. A failure to respond to the European dimension could have an impact upon the perceived value and role of the professional association.

To date a 'profession specific' Directive has not been issued by the European Commission in respect of any of the professions that are the subject of this study. The initiation of one or more investigations at a future date would present a greater challenge to status-seeking associations than status-maintaining associations and could well result in a further area of distinction between status-seeking and status-maintaining associations.

A 'general' directive such as the European Community's eighth Company Law Directive can, however, have very significant implications for the professions studied, particularly the accounting profession<sup>(65)</sup>. The structure and practices of the UK 'accounting' associations are likely to be the most affected (of the associations considered in this study) by developments in Europe<sup>(66)</sup>.

The great majority of members of the UK professional associations that are the subject of the present study have gained their professional qualification through part-time education, including correspondence courses, and 'on the job' practical training. In Europe, in contrast, professional qualification tends to be associated with full-time and academic education.

Were a requirement for the successful completion of at least three years of full-time 'vocational education' in a university or equivalent institution as properly accredited by one of the EEC states to be adopted as a criteria for judging whether or not professional people are eligible for practise in any community state to be adopted, then both status-seeking and status-maintaining associations in the UK would face a significant challenge. Such a move would tend to favour the academic vocational qualification against the traditional professional qualification.

The professional associations likely to be impacted to the greatest extent in terms of their competence base are those whose competence is concerned with the understanding of state regulations and legislation. Thus the ICA will face a potentially more direct impact than the BIM. In contrast the associations which, like the BIM, are not limited to such a narrow field of competence may find it easier to operate on a European dimension. There may be less to divide a BIM from its 'sister' associations in other European countries than would be the case with the ICA.



### 13.7 SUMMARY AND CONCLUSION

The study appears to confirm the view<sup>(67)</sup> that too tight a definition of a profession can lead to an excessive concentration upon characteristics possessed by 'ideal type' professions. Only the accounting associations appeared to continue to exhibit the characteristics of the 'ideal type' profession and the findings suggest that hypotheses formulated upon the basis of observation of 'ideal type' professions can be of less, even limited, value in understanding certain aspects and activities of business graduate associations and management associations.

An implication of the study is that the management associations in particular should be regarded as a group of associations in their own right, rather than as a sub-set of the 'profession' as is implied by the use of such terms as 'semi-profession'. Significantly a number of business graduate association and management association members interviewed, drew a distinction between the 'managerial' occupation and the 'professional' occupation. Managerial work appeared to be perceived as more relative, uncertain, flexible, changing and employer (as opposed to society or public) oriented, with satisficing, even surviving, being the objective rather than the achievement of absolute standards in respect of work undertaken. 'Managerial' work seemed to be perceived as more of a flow and less as discrete tasks than 'professional' work.

Given the number of factors that have been identified and which have influenced the findings of this study, caution should be exercised in relating and applying these findings to professions other than those examined and to associations other than those studied.

While the representational activity of some of the associations studied commenced soon after their formation (see 'historical' Appendices VIII-XIII), more recently this activity has grown in scale with the expansion in the volume of legislation and regulations affecting business. The process and practice of representation is emerging as a subject of study (by businessmen) in its own right(68). Over the period of the study the professional associations examined appeared to place increasing importance, particularly in interviews and informal discussions, upon their representational roles to the extent that perhaps the possession of a representational role, although not exclusive to the professional association (eg also possessed by trade associations) should be regarded as an additional characteristic of a profession(69).

The changing balance between the qualifying and representational roles of occupational associations is not confined to the associations studied. One sees similar and parallel trends in other associations. The legal and 'architecture' professions on the basis of the author's discussions with the Law Society and the Royal Institute of British Architects reveal a growing awareness of image issues, some sensitivity to public criticism and a determination to do more to represent the views and collective positions of these professions. The ongoing activities of the British Medical Association provides some clues as to the extent to which the representational role (as distinct from the qualifying role) can be developed. In particular the representational role of the BMA has become more active in response to reductions in previously planned rates of public expenditure growth.

Over the period of the study the professional association has, in general, exhibited a tendency to lose its exclusive concern for an area of education and training as the range of professional and educational courses taught in the state education sector has widened. Increasingly the professional association may need to be regarded as an organisation that possesses certain combinations or sets of characteristics rather than as an organisation that possesses a particular and relatively exclusive set.

The growth of vocational training and education in the state sector and the development of joint venture and arrangement links between professional associations and academic organisations could blur the traditional distinction between the academic and the professional qualification.

Membership of a professional association may in future come to be associated rather more with securing (perhaps temporary) access to a relevant range of professional services and less as an indication of having undergone a preparation for a lifetime career<sup>(70)</sup>. The implication of such a trend would be that continued membership will no longer be assumed to such an extent as hitherto has been the case, and associations will need to put more effort into identifying the needs of and ensuring the relevance of their services for various significant constituencies within the membership.

The size and quality of association membership is regarded by members of the governing organs of professional associations, other things being equal, as important per se. One may in future see more systematic techniques such as direct mail and more targeted advertising being employed by professional associations to stimulate interest among potential members and students. The active promotion of membership appears to be of greater importance to those professional associations (eg CAM, IM, IPR, IOD, BIM, BGA, BBGS) the membership of which is not a requirement for employment in the broad vocational sectors with which they are concerned.

Professional associations may become more concerned with identifying and defining their unique qualities, the particular factors, attributes and strengths that distinguish them from other professional associations and then communicating and marketing what they feel they have to offer (and their comparative strengths and advantages) to defined targets<sup>(71)</sup>.

Professional associations may be required to define more tightly and precisely the experience requirements for membership. More developed criteria may be needed for comparing experience in one sector with that in another.

Professional associations may need to devote greater attention to the identification and definition of job areas and career paths for which their qualification is not only relevant but could be tailored. Such identification and definition would not only give direction and guidance to individual members, but would provide a framework within which the professional associations own qualifications and services (particularly those to its members) could be focused and developed<sup>(72)</sup>.

It is possible that individuals serving clients in public professional practice on a fee basis, and those employed in market oriented situations by commercial organisations, where their professional expertise is relevant but not exclusively, or even substantially used, could be subjected to differing professional association requirements in such areas as continuing education; professional updating; practising certificates; ethics and codes of practice; disciplinary procedure; professional liability; negligence criteria, and formal registration.

In the case of SCCA, ICSA and the IOD, the pressures for fragmentation could include growing demands for autonomy and independence on the part of overseas branches, Associations and divisions.

Towards the end of the period of the study there appeared, among individual professionals, to be a growing awareness of the extent to which what were perceived as professional privileges based upon legal protection and other 'barriers to entry' were being questioned in the interests of greater competition. One could envisage a growing importance being attached within professional associations to the offering of services to improve the ability of members to market their services and compete with non-members and the justification of membership on the basis of benefits to individual members and individual competitive advantage rather than such more traditional factors as service to clients and maintenance of standards<sup>(73)</sup>.

Alongside the continuing desire of professional associations for a higher degree of self-regulation, the future may see a growing willingness of government to intervene and interfere, even where the principle of self-regulation has become relatively long established, where to do so is perceived as necessary from the point of view of being in the interests of clients or the public at large. Self-regulation, while remaining an aspiration of professional associations, may in future need greater justification to be achieved and/or maintained.

Overall the management and governance of professional associations, in terms of the range of interests to be accommodated and the number of factors to be taken into account in decision making, appears to be coming more complex. While the smaller association may opt to cope with such complexity by deciding to do less by taking on fewer accountabilities, this may not be so easily achieved by the larger and more established associations that face some determined interests and higher expectations. The implications of the findings of the study for the management of occupational associations will be examined in Chapter Fourteen.

One may see more associations undertaking fundamental or first principle examinations of their roles and responsibilities in order to more precisely define their missions, objectives and accountabilities. Strengths and weaknesses, opportunities and threats type exercises may be undertaken by governing organs, perhaps in association with external consultancies. Organisations may need to be reshaped and processes of management changed.

If existing professional associations do not adjust to the demands of the changing nature of work and evolving management processes and the emerging needs of members and clients/customers then the notion of a 'traditional' professional association associated with a particular mode and pattern of work may disappear and new forms of organisation offering a different range of services may evolve to meet the new needs.

## CHAPTER FOURTEEN

### IMPLICATIONS FOR THE MANAGEMENT OF OCCUPATIONAL ASSOCIATIONS

#### 14.1 INTRODUCTION

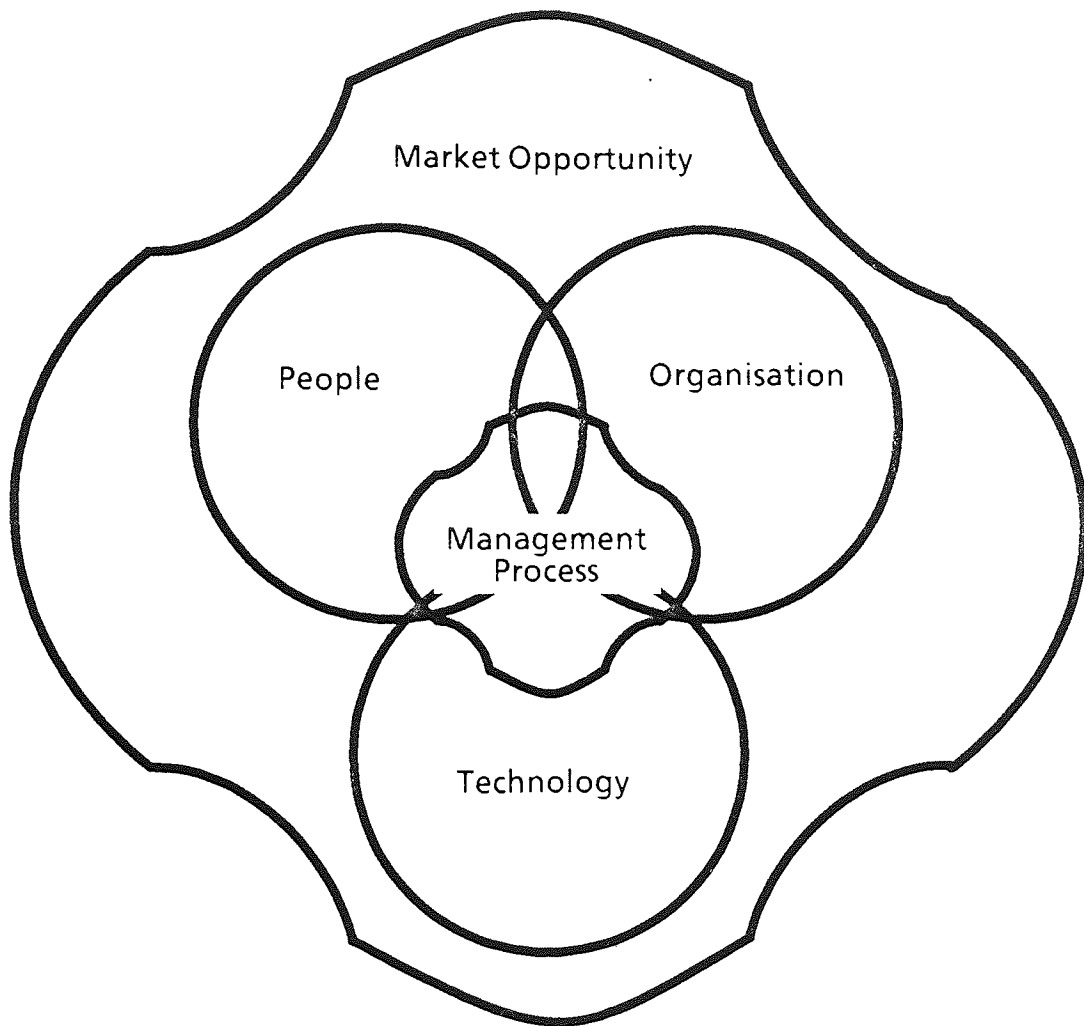
The purpose of this chapter (which is primarily concerned with operational management) is to examine some of the implications of the findings of this study for the management of occupational associations. The term occupational association has been used as the question has been raised (see Section 13.2 of Chapter Thirteen) of the extent to which the BGA and BBGS can be properly said to constitute 'professions' as opposed to occupational groups. Taken as a whole the findings presented in Chapter Twelve suggest that all the associations studied face a similar 'management challenge'.

The nature of the managerial challenge is set out in Table 14.1 in the form of a schematic developed by the author<sup>(1)</sup>. The managerial challenge is to define the market opportunity facing an association, develop the required resources of people and technology, and create the form of organisation and management process that will allow an association's people, technology and organisation to match and confront the defined opportunity. The remainder of this chapter will examine each of these elements in turn.

Implications relating to the 'strategic' management of occupational associations are primarily considered in Section 14.2 concerning the market opportunity confronting such associations. 'Executive' management implications are considered in separate sections dealing with 'people' (Section 14.3), 'organisation' (Section 14.4) and 'technology' (Section 14.5) issues. It will be seen that certain of the issues considered in Sections 14.3-5 will have 'strategic' implications for occupational associations. Implications of the findings for the management processes of occupational issues suggest that the relative roles and responsibilities of association Councils (re 'strategic' management) and association secretariats (re 'executive management') may need to be redefined.

TABLE 14.1

Occupational Association 'Managerial Challenge'



Throughout the period of the writing up of the study (1986-87) the author served upon the Council for the Professions Supplementary to Medicine as the representative of the Privy Council for England. As a member of the Council, the author received minutes of all full meetings of the Boards of the seven professions supplementary to medicine. This degree of access allowed the author to assess the relevance of the findings of the study to the management of these associations. All seven boards are represented on the Council by their Chairmen. Representatives of the Royal College of Physicians, Royal College of Surgeons, Royal College of Obstetricians and Gynaecologists, General Medical Council also serve on the Council together with a single representative of the three 'Scottish' Royal Colleges.

This perspective on the professions supplementary to medicine and the medical professions was supplemented by the author's membership (throughout the period of the study) of the Board of Governors of Moorfields Eye Hospital, a Special Health Authority directly accountable to the Secretary of State. Some further insight into issues concerning professionalism within the public service was made possible through the author's membership of the National Biological Standards Board. The Board is responsible for the National Institute for Biological Standards and Control.

The conclusion of the author's assessment of the applicability of the findings of the study to associations whose members are predominantly 'in' the public service is that they should only be applied to such 'public service' associations with considerable caution. The implications of the study for the management of occupational associations considered in this chapter are most applicable to those associations whose members are subject to, and free to respond to, market forces.



Some members of all the associations studied are known to work within the 'public sector'. The tougher stance of the Government in pay negotiations and what is perceived as 'pay restraint' has emerged as an issue of concern to those professionals who work within the public sector. In discussion with members of the BIM and ICA working in the public sector it is clear that this group of professionals is concerned about losing ground in terms of comparability with their colleagues in the private sector.

While there has been some study of the management of occupational associations<sup>(2)</sup>, the occupational association has tended to be regarded as a complete entity with a relatively hard shell, the focus of enquiry being upon its relationships with external groups such as government and clients. The 'functionalist' approach to the study of 'the professions', for example, concentrates largely upon the social role and function in society of occupational groups under examination<sup>(3)</sup>. Neo-Weberian (eg Marxist) approaches to the study of the professions have tended to view characteristics and internal elements of associations as pretensions claims, images and symbols rather than as resources to be managed<sup>(4)</sup>.

Insufficient attention has been given to the internal workings and dynamics of professional associations. Studies of particular occupational associations have tended to be concerned with their historical development (see Appendices VIII-XIII) and their process of professionalisation rather than with their contemporary management<sup>(5)</sup>.

The focus of the study has been upon the values, attitudes and behaviour of those who serve upon the Councils (governing organs) of occupational associations. The implications set out in this chapter are relevant to those who serve on occupational association Councils and Committees. They also impinge directly upon, and should hence be of interest to, those who work on an employed basis within the secretariats of occupational associations. It will be incumbent upon the secretariats to undertake the work of analysis that will enable the Councils of their associations to take informed decisions.

## 14.2 MARKET OPPORTUNITY

Occupational associations are likely to have to devote more time and resources to monitoring and evaluating the market environment if they are to ensure a continued flow of services that meet the evolving needs of their members and clients. Analysis and closer contact with the 'market' can enable an association to both define new target groups, for whom its existing services may be relevant, and identify new services (and refinements of existing services) that more closely meet the needs of existing and priority target groups of members.

There is some evidence that occupational associations are defining their 'market' more broadly than 'members and potential members', and in terms of 'needs for services' which, prima facie, the association concerned could address<sup>(6)</sup>. The Law Society's Strategy Committee has, for example, examined the market environment within which solicitors are likely to operate and determined the services they will require, and has formulated a strategic plan for the 1990s which includes proposals for the development of new ranges of Law Society services<sup>(7)</sup>.

The total market for learning and development services is likely to expand<sup>(8)</sup>. One may expect growing national and corporate awareness of the importance of human skill as a source of competitive advantage. There could also emerge in the 'market-place' further awareness of the extent to which the international comparative advantage of the UK lies in areas concerned with the provision of individualised services such as education and training<sup>(9)</sup>.

One may see greater corporate awareness that human rather than physical or financial capital is often the scarce resource(10). This, coupled with recognition of a more rapid turnover or obsolescence of skills, may act to increase the demand for professional training. At the same time tools such as expert systems, may 'de-skill' occupational groups and hence reduce the demand for external training services(11). A more dynamic environment, the spread of expert systems and wider access to and availability of databases is likely to challenge the role of the 'professional' or 'expert' and greatly increase the importance of continuing education and updating.

A combination of greater 'home' time, due to 'home' working and shopping, could result in a significant increase in time devoted to home learning, updating and self-improvement through distance, self and individual selected learning modules.(12)

The spread of home terminals and development of fibre optic telecommunications that help to release this time could together represent a preferred method of delivery of the increasing demand for 'education' or learning services that may emerge. The potential significance of the 'remote' desktop terminal as a point of delivery of training facilities, inter-active tutorial support, and professional information services is recognised in the BIM 'helpline' service(13).

With workstations of growing functionality and the more widespread use of expert systems, one is likely to see a convergence of learning and research environments that may erode the knowledge creation role of the occupational association(14). Opportunities of a different kind are likely to bring new suppliers and new systems of delivery into the education and training market-place.

The role of occupational association management will be to differentiate an association from other suppliers of skill training, whether of basic technical skills, managerial skills or higher and professional skills, and articulate and communicate strategies and supporting activities that persuade potential purchasers and 'members' that the association is able to add value or enhance a skill or competence premium to a greater extent than the alternatives available. To do this will require association management to take a closer look at their 'competitors' than has hitherto been the case.

A major challenge for occupational associations will be to differentiate themselves from other similar and related associations. Association managements will need to justify the continued existence of their associations. This will require 'competitive analysis' of other associations and the identification of unique strengths and relative advantages. An example of such an approach is the decision of the SCCA, following a review of its comparative strengths and weaknesses vis a vis other 'accounting' associations, to specialise in the supply of services to the smaller business<sup>(15)</sup>.

Individuals and corporate groups are likely to take greater responsibility for their own 'professional' education and training<sup>(16)</sup>. These individuals and groups are likely to prefer the delivery of education to them in their place of work or at home rather than their own attendance at an educational institution. One may see occupational associations and educational institutions both competing and co-operating in seeking to meet this emerging need.

Occupational association managements will need to understand a wider range of 'learning' delivery mechanisms. Both ICSA and the ICA have entered into arrangements concerning the supply of software products to their members(17). To achieve the required degree of understanding may necessitate investigation of such tools as simulation, inter-active video, standalone and embedded computer based training software and artificial intelligence. In respect of each of these tools there may be both individual and corporate customers. The association will need to understand the distinct requirements of groups of customers by application area or market sector, and the considerations that underline their purchases of learning services(18). It may become more necessary for professional associations to develop sector marketing programmes aimed at particular areas or sectors of opportunity.

Traditionally the primary relationships of occupational associations have been with individuals who have tended to study on a 'standalone' basis, with or without the support of their employers. In future occupational associations will need to take account of the emergence of a greater number of group training requirements as office systems networks spread and companies become more conscious of the importance in competitive terms of the skills and competence of certain teams and groups of employees(19). To confront this opportunity associations will need to develop the ability to achieve contact, diagnose group skill and learning requirements, and provide and market group training packages that take account of the delivery options available, given the technology base of each corporate 'customer'.

In short, occupational associations will need to find ways of classifying and categorising different market opportunities in order to determine what needs to be delivered to different groups of learners and categories of individual, and the central resources that will be needed within the association to support the learning process(20). A resource an occupational association does have is its existing membership. One may see associations making a greater effort to harness the experience and understanding of their more senior and older members for the benefit and guidance of those who are younger and at an earlier stage in their careers.

Both the IM and BIM initiated programmes in 1987 to recruit 'volunteers' from their more experienced members who would be prepared to tutor and train their younger and more junior colleagues(21).

As open and distance learning spread, the notion of the professional subject teacher may become replaced by the concept of a new breed of professionals who act as facilitators of the learning process. Such skills as the facilitator of learning will possess may cross subject and discipline boundaries. Occupational association managements may need to take a much closer look at the comparative and competitive strengths and weaknesses of their teaching skills and resources in order to determine what skill enhancement activity or arrangements with complementary organisations will be needed in order to more effectively facilitate the learning of those who look to the association for support.

A challenge to the concept of the general purpose value of a store of professional knowledge may be posed by a more 'situational' view of the relevance of expertise. Information and expertise may be perceived as of little or no value unless it can be applied to increase understanding, or improve the quality of decisions, at the point at which decisions are made(22). Association managements may need to become more aware of which aspects of the skills or competence of their members add value in the context of the work they undertake.

There is some evidence that 'clients' and 'customers' are becoming better informed of the services offered by occupational associations and more critical of, and discriminating in the choice of such services(23). Occupational associations if they are to grow and prosper cannot afford to take a flow of new members for granted. Active steps will need to be taken to identify and communicate with potential members. Direct mail techniques are likely to be increasingly used. These communications may need to be directed at target groups earlier in their careers. An interesting question facing the 'managements' of occupational associations is the extent to which an association should follow market opportunity overseas to 'markets' such as the Far East where the traditional professional qualification may come to be valued more highly than in the UK.

Occupational associations are becoming more sensitive to market forces and more willing to identify and accommodate to external pressures and requirements. One may need to reassess notions of professional status in terms of 'market' acceptance and 'market' performance. The theory of competitive business behaviour, particularly that relating to corporate image and identity may become of more relevance in understanding professional association behaviour. Reference to a position reached on a notional process of professionalisation may become of less value than relative market position in the understanding of behaviour relating to association status and standing.

During the process of writing up the study (1986-87) the author participated in two discussions with the Minister for Corporate and Consumer Affairs which suggested the likely emergence of a more robust attitude towards perceived professional 'monopolies' and barriers to competition. The end of the effective 'monopoly' of solicitors on conveyancing is an example of a loss of what could be considered a 'favoured' or 'privileged' position.

Greater heterogeneity of membership and the reality of a national government in the UK with a stronger sense of its own priorities, and greater determination to implement its policies, may inhibit the effectiveness of occupational association representational activity. This could lead to a sharper distinction between the occupational association and the trade association and a focusing of occupational association representational activity upon matters more narrowly of concern to the individual profession<sup>(24)</sup>.



One is likely to see a focusing of funding at national and European level upon collaborative ventures concerned with the establishment of national and regional interactive learning networks which focus upon particular critical skill shortages and the erosion of barriers and obstacles to the wider adoption of computer based distance learning methods<sup>(25)</sup>. The BIM was in late 1987 exploring the possibilities of participation in appropriate European networks. Occupational associations that do not participate in such networks could become 'bypassed'. Raising the resources to fund participation from the subscription base of the occupational association will not be easy. It is likely that subscription income will need to be supplemented to a much greater extent with earnings from a range of services supplied on a strictly commercial basis.

Given that neither the BGA nor the BBGS are 'qualifying' associations, not all of the market environment considerations examined in this section will impact upon them directly. Developments in the technology applicable to the learning process, for example, could have a more direct impact upon the 'business schools'.

Market environment pressures could lead to a blurring of the boundaries between the 'business graduate' associations and an association such as the BIM. The 'interest' created by the 'Handy' and 'Constable' reports has resulted in some commitment on the part of business to work to increase the quantity, and improve the relevance, of management education<sup>(26)</sup>. The BGA would appear to understand, and to be receptive to the 'market opportunity' as it relates to its own role<sup>(27)</sup>. The same could not be said of the BBGS, but this association has recognised its deficiencies, and this recognition is explicit in its drive to be absorbed by the BIM (see Section 13.2 of Chapter Thirteen).

The ICA is distinct from the other associations studied in that, so far as its field of functional or professional speciality is concerned, it is able, in part, to influence (in negotiation with Government and other members of the CCAB) the nature of its market opportunity (see Section 13.3 of Chapter Thirteen). It would appear to be in a position to understand the opportunities and challenges it faces, and to have the resources to cope with, or accommodate to, them. Developments arising out of the European Commission may prove the most intractable (see Section 13.6 of Chapter Thirteen).

Unlike the ICA, the SCCA does not have the resources to fully understand and confront the full range of market opportunities that it faces. This is largely understood by the SCCA itself, and is reflected in its concentration upon the provision of services to the smaller business (see Section 13.3 of Chapter Thirteen). Even in this relatively modest role, it is not inevitable (in the view of the author) that the SCCA will be able to cope with the growing complexity of the 'market-place'.

A response of three (IPR, IM, BIM) of the 'management' associations to the challenges to 'general' skills considered in this section has been to seek to establish and recognise the 'specialist' skills of their members through the acquisition of a Royal Charter (see Section 13.4 of Chapter Thirteen). Of the 'management' associations with 'chartered' status, the IOD appears the most resistant to the challenge in that it has a relatively stable and largely 'homogenous' requirement for membership (namely that one is a director of a limited liability company). In contrast, ICSA serves a much wider range of interests and hence faces greater challenges. ICSA has demonstrated its ability to examine the 'market opportunity' it faces and develop an appropriate strategy for confronting it(28).

CAM, the final 'management' association, is substantially an examining body. The challenges it faces are largely those resulting from developments in the technology and preferred practice of learning. It is not clear that CAM fully understands, or has the resources to confront, the 'market opportunity' it faces. Should the cost of its examining role become too high, it is possible that its 'constituent organisations' would look to the state education system to provide an examining function in place of CAM.

### 14.3 PEOPLE

As a consequence of a more general increased focus upon the importance of skill and competence building, and the encroachment of technology upon the learning process, it will be necessary for occupational associations to ensure that their own people resources match those with whom they come into contact. This may require a greater investment in secretariat staff training and development than has tended to be the case with occupational associations.

Among the membership of the ICA there is some awareness that such 'traditional' qualities as 'character, courtesy and co-operation' are being replaced by such qualities as 'intellect, ability, drive, ambition and self-interest' as perceived essential attributes of members of the profession<sup>(29)</sup>. One may see a growing premium being attached to possession of the desired attributes along with increasing competition for outstanding, even clearly above average, talent in the 'market-place' and within occupational association secretariats.

It is likely that the proportion of women seeking professional qualifications will continue to increase. Associations will need to address this question<sup>(30)</sup>. The extent to which women will play a more significant role in the management of occupational associations will reflect their general position within corporate management hierarchies. The study did not suggest that a greater involvement is likely to occur earlier or later in the case of occupational associations.

In recruiting staff for occupational associations the importance of administrative ability is likely to assume a lower priority, while possession of teamworking skills is likely to assume greater significance. To match evolving skill requirements, it may be necessary for association secretariat staff to be moved between functions to a greater extent. More thought may also need to be given to the career development paths of occupational association employees. This is a matter which has been considered by the ICA, ICSA and BIM.

For the younger person, the choice of a first job can have a significant impact upon future career development<sup>(31)</sup>. Unless associations can demonstrate that a period of service in a 'non-profit making environment' will (at minimum) not harm subsequent career development in the 'commercial' sector, they may experience difficulty in attracting 'high flying' talent.

Occupational association management has traditionally drawn upon groups seeking second careers, for example, former officers retiring from the armed forces. It is possible that such individuals are attracted to the secretariats of occupational associations in part because of the social standing or 'respectability' that this confers<sup>(32)</sup>. These individuals, often in receipt of pension rights from a previous employment, tend to favour occupational association employment. While remuneration rates offered by occupational associations do not match those in the commercial sector, occupational associations do offer a relatively high level of job security and confer an acceptable degree of social status upon their senior employees.

Occupational associations will, in future, need to offer significantly higher salaries to attract staff with scarce skills. Increasingly, the salary scales of commercial organisations will need to be matched if the second career administrator is to be replaced with the younger 'career' manager.

One may see occupational associations resorting to a greater extent to consultants or to contract workers or networkers, in order to gain access to a higher quality of skill than would otherwise be the case for an available budget<sup>(33)</sup>. The use of 'networkers' can reduce overhead costs, support skill retention and allow a more flexible use of people skills<sup>(34)</sup>. In the public sector, where the administrative 'ethos' and culture is similar to that found in the secretariats of occupational associations the whole question of more flexible patterns of work is being considered with some interest<sup>(35)</sup>.

The secretariats of both the BGA and BBGS are too small to offer the prospect of career development, and both associations are unlikely to attract younger 'high flying' talent. The BGA found it very difficult in the period 1985-86 to recruit a new chief executive. The BBGS has been forced to rely upon volunteer effort, for the discharge of many tasks undertaken within the secretariats of other associations. In the notice to BBGS members of the 1987 BBGS Annual General Meeting it was pointed out by the Secretary that 'unless several new Committee members are found the future survival of the Society is in serious doubt', and that the existing officers were prepared to consider 'winding up' or 'merging' the Society with another organisation 'which supports similar objectives' rather than see it 'deteriorate into inactivity'(36).

Senior positions in the ICA secretariat carry some standing in Society. The ICA is able, on the whole, to recruit the staff it needs to its London office. It has a secretariat of sufficient size to offer some scope for career development. On occasion, however, research positions have had to be filled by academics on a part-time and 'flexible' pattern of work basis. In contrast the SCCA, located in Bristol, has experienced difficulty in recruiting a chief executive and in appointing technical staff. The size of its secretariat does not allow it to offer the prospects of career development.

All of the 'management' associations have, at one time or another in the course of the study, experienced difficulty in recruiting the 'level' of staff they need. The three associations categorised as 'status-maintaining' (IOD, ICSA, BIM) are able to appoint chief executives of standing, but their secretariats (compared with that of the ICA) are too small to offer a young 'high flying' entrant the prospect of steady career development and progression. The IM has even greater difficulty in recruiting 'high calibre' staff in view of its 'out of London' location at Cookham. The secretariats of the IPR and CAM, in comparison with those of the IOD, ICSA, BIM and IM, while able to offer a chief executive a 'respectable' post, are too small and limited to attract individuals with 'talent' and to offer any prospects of career development. The 'management' associations may increasingly need to make use of 'networked' or part-time 'flexible' pattern of work services in order to secure the 'level' of expertise they require.

#### 14.4 ORGANISATION

In a number of interviews the organisation of an occupational association was likened by interviewees to that of a local authority. Secretariat staff were perceived as producing papers for, and servicing, committees, important decisions being left to the due deliberations of an ultimate governing organ. The skills traditionally required of occupational association employees and the archetypal form of occupational association organisation structure reflects this 'model'. A theme that emerges at a number of points in Chapters Twelve and Thirteen is that, in order to accommodate more rapidly to changing 'market' needs and opportunities, an occupational association may, in future, need to evolve a form or organisation that is less like that of a local authority and more like that of a commercial organisation.

In positioning themselves for acquisition of a Royal Charter, the BIM, IM and IPR may experience some 'tension' between the organisational requirements for commercial success and those relating to the discharge of constitutional, educational and disciplinary responsibilities under a Charter and bye-laws. While commercial success requires entrepreneurial flair, the discharge of Charter obligations demands administrative and quasi legal skill. It may be that these associations will increasingly adopt the approach of ICOSA and 'hive' their 'commercial' operations off to separate companies or ventures<sup>(37)</sup>.

A survey of ICA members in 1982 (cited in Appendix XIV) found a shift from 'professional' to 'managerial' values with profit and growth replacing service and stability as professional practice goals and standards, flexibility and change replacing integrity, rigidity and conservatism as imperatives in professional practice<sup>(38)</sup>. Secretariat values and organisation will need to match those prevailing in professional practice.

Future forms of occupational association organisation are likely to be more flexible and adaptable. As occupational associations focus more upon their comparative advantages, there will be a need for greater integration of the activities of the various departments and divisions within the organisation. This suggests a requirement for common values and shared understanding of an association's direction, objectives and priorities. There may be more movement of staff between functions, in order to build common values and erode functional barriers. There is also likely to be a greater emphasis upon cross-function communication and teamworking. Of the associations studied, only the organisations of the ICA, IOD, BIM, ICSA and IM are large enough to allow such developments to occur.

One may, in future, observe greater differences when comparing the organisations of a number of occupational associations (especially in the case of 'non-chartered' organisations). This is likely to result from greater awareness of the extent to which people, technology and organisation are interdependent and the adaption of different organisations in varying ways to confront distinct market opportunities and perform particular tasks<sup>(39)</sup>. One may see more experimentation with organisation across occupational associations as each independently seeks to migrate to forms of organisation that are more market oriented. A greater willingness to enter into, and a wider range of, joint ventures and arrangements between occupational associations, educational institutions and commercial organisations is also likely to emerge.

Of the five associations studied with the organisational resources to respond to the challenges considered in this section three are already in possession of a Royal Charter (ICA, IOD, ICSA), while two are seeking such a Charter (BIM, IM). These organisations will need to reconcile the demands for flexibility and adaptation with the discharge of obligations under a possessed or sought Royal Charter. The IPR perhaps faces the greatest challenge in that it is seeking to develop a stronger commercial role and to 'step up' to the demands of 'chartered' status from, in organisational terms, a relatively limited based.

The associations with the greatest organisational freedom (BGA, BBGS, CAM) are, paradoxically, those which have the least need for organisational flexibility. The 'product' with which the BGA and BBGS are concerned, namely the 'business graduate' is produced by external business schools, rather than by these associations themselves, and the range of services offered to members is limited in comparison with those offered by a chartered 'professional' association. The role of CAM is similarly limited, largely to an examining function.

The remaining association, the SCCA, is, in organisational terms, in something of a dilemma. It would like to play a more 'general' role and engage in a variety of activities, but lacks the scale and flexibility of organisation to offer its members other than a relatively basic range of services. It is difficult to see how the SCCA's membership base could fund the organisational development that would be required to offer a broader portfolio of services.



#### 14.5 TECHNOLOGY

Another underlying theme in Chapters Twelve and Thirteen is the growing awareness, particularly apparent in interview and participant observation situations, of the likely future impact upon occupational associations of information technology. Studies which have been undertaken on the impact of technology upon 'the professions' have tended to focus upon its impact upon occupational groups in the work context rather than upon the collective organisation of such a group in the form of an occupational association<sup>(40)</sup>. A major occupational association is likely in future, if not already, to need a distinct information technology strategy.

Technology will impact upon the skill and competence base of association members and secretariat employees<sup>(41)</sup>. It will also impact upon organisation and the administrative work of an association<sup>(42)</sup>. Technology will also provide more paths by which an association is able to deliver its services to members and clients. All these aspects of technology will need to be considered by association managements.

The process of professional training and updating is likely to be significantly influenced by such factors as knowledge-based interaction, improved human interface, adaptive interactive dialogue, intelligent 'electronic tutors', programmable user models, decision support tools, interactive video product technology and intelligent visual and audio scanners<sup>(43)</sup>. More significantly, integration and greater compatibility associated with an enhanced telecommunications network, and the creation of group learning environments is likely to result in learning management devices that challenge the traditional role of the occupational association.

It may become possible for an expert system on an individualised basis to identify and remedy operative skill deficiencies. Continuing development of expert systems is likely to allow the individual professional learner to exercise greater control over their own learning. Improvements in the area of human interaction may allow more accessible and intuitive 'do it yourself' or self-learning approaches to spread at the expense of inflexible operating systems and packaged learning. Increasingly the computer will be used as an analytic tool to monitor performance and determine training needs (44).

Occupational associations will need to embrace those technologies that particularly relate to their own priority activities. Regular communication with members absorbs a significant proportion of occupational association resources. With the development of vocational groups, future communications are likely to be tailored to the distinct needs and interests of different sections and groups of association membership. This suggests greater use of desktop and workstation based publishing systems.

Information technology investment in information systems which has tended to focus upon the automation of routine predictable 'clerical' work or regular transactions is increasingly likely to give way to more of a focus upon the 'unstructured' world of the knowledge worker or 'professional' (45). Given cost pressures, such incremental office systems investments as are made will need to be compatible with, and enable a greater return to be made from, historic information technology investments (46).

Both the BIM and ICSA have made significant (in proportion to their resources) investments in information technology in order to position themselves for an expansion of activity. In the case of ICSA equipping itself with appropriate technology has been viewed as a necessary precondition of launch of its 'Corporate Plan' for the period 1988 to 1992 (47).

Of the associations studied, perhaps only the ICA has the resources to invest in what approaches 'state-of-the-art' technology without 'external' assistance. The BIM has needed support from the Department of Trade and Industry to complete the computerisation of its Management Information Centre and launch its electronic 'helpline' service. The BIM, IOD, ICSA and IM should have the resources to invest in sufficient technology to perform basic administrative routines, but one is unlikely to see higher level workstations on the desks of more than a minority of their executive staffs until the 1990s. The remaining associations in the study (BGA, BBGS, SCCA, IPR and CAM) face a 'dilemma of scale', in that 'independent' of their 'status' categorisation, they may not have sufficient resources to maintain 'technological' viability and compatibility with the technology likely to be used by their members in their work situation<sup>(48)</sup>.

#### 14.6 MANAGEMENT PROCESS

To meet the management challenge explicit in this chapter and implicit in Chapters Twelve and Thirteen, it is likely that occupational associations will need to evolve management processes that approximate more closely to those found in leading edge commercial organisations. These management processes will need to assume a continuation of review and incremental change in most areas of occupational association activity.

In order to meet the shifting requirements of their members, and their 'customers', occupational associations will need to introduce processes to periodically review their activities and resource allocation, even their occupational knowledge base. One may see occupational associations introducing the roles and responsibilities exercises, quality programmes, systems and resource requirements, reviews and other team processes increasingly found within commercial organisations.

The management process employed in occupational associations is likely to shift (to the extent that a 'chartered orientation' will allow) from a predominantly public sector model, an administrative process, to more of a commercial model, a managerial process. In particular, one is likely to see greater emphasis upon teamwork with all that this implies for communication and methods of working within occupational association secretariats. The management process within the occupational association is likely to become more participative and more accommodating of the needs of individuals within the organisation<sup>(49)</sup>.

Among chartered accountants there is some evidence that traditional underlying beliefs such as a shared ideology among practitioners, the assumption of a privileged position and a preference for protection from competition are giving way to an acceptance of pluralism, egalitarianism, competition and individuality<sup>(50)</sup>. Association management processes will need to accommodate these shifts in beliefs.

The author is not convinced that even one of the associations studied is likely to introduce a sufficiently flexible management process to allow a significant expansion of its role in society. The smaller associations (eg BGA, BBGS, SCCA, CAM) lack the resource base to even aspire to such an expansion, while the larger established associations (eg ICA, ICOSA) are 'limited' by the obligations of their recognised and 'chartered' status, both in terms of the flexibility of their organisations, and their freedom of action 'independent' of a 'consultative process' with Government and other associations.

The associations with sufficient resources to support, and enough freedom to operate, a more flexible management process (BIM, IM, IPR) are the associations positioning themselves for 'chartered status'. This raises the question of whether progress along a path of professionalisation to 'chartered' status might be incompatible with the requirements of 'commercial' success. Those associations which use the opportunity to draw up a new 'green field' constitution (in the form of a Royal Charter and bye-laws) to support a more 'effective' management process are likely to become more adaptable than those seeking to translate an existing management process and organisation structure into a different constitutional form.

The developments considered in this chapter will have implications for the respective roles and responsibilities of full time secretariat employees and voluntary and elected Council and Committee members, who are only periodically involved in association affairs. A new form of relationship, based more upon shared understanding, may emerge between the occupational association non-executive elected member and permanent secretariat employee. In particular, one may see more active participation by secretariat employees, with relevant information and understanding, at appropriate points in the deliberations of association governing organs.

In the case of the ICA there is an established tradition of service (particularly by partners of larger professional firms) on the Council and Committees of the Institute requiring a significant commitment of voluntary effort. Otherwise, the associations with the more developed representational roles (eg IOD, BIM) tend to be those giving the greatest discretion to the 'secretariat' or 'management team'. In the case of the smaller associations (eg BGA, BBGS, SCCA, IPR, CAM), the scale of organisation is generally not sufficient to support more than one individual (the 'chief executive', or head of the secretariat) with the 'standing' to be considered by the majority of association Council members as an 'equal'.

To confront market opportunities occupational associations will need to institute processes to regularly review, frankly and objectively, what resources are available and how they can be harnessed in a way to offer a differentiated service that meets a real market need. The identification and development of cost and revenue centres is likely to become increasingly important as attempts are made to put a growing range of occupational association activities and services onto a self-financing basis. Again it is the larger associations (eg ICA, IOD, BIM, ICSA, IM) that are able to do this. Establishment of activity centres and the identification of activity costs and revenues also enables these to be compared with external 'commercial' or non-occupational association suppliers.

It should not be assumed that all occupational associations will be readily able to obtain the people skills they require. One is likely to see (among associations that 'allow' themselves the 'freedom' to act) greater diversity of management approaches and experimentation as a result of skill and professional teacher shortages.

#### 14.7 SUMMARY AND CONCLUSION

The management challenge facing the occupational association is to determine and operate a management process that enables appropriate opportunities to be identified and the combined resources of people, technology and organisation to be harnessed and effectively applied to confronting and satisfactorily (and increasingly profitably) addressing these opportunities. A more rigorous process than that used hitherto is likely to be required.

Table 14.2 ranks the associations studied on a continuum of capability (from the greatest capability to the least capability) in relation to the 'challenges' to occupational associations considered in this chapter. The 'assessment' is the qualitative and subjective assessment of the author. While the 'assessment' is crude, it emerges that in defining 'capability' in terms of ability to respond flexibly, satisfactorily, appropriately and significantly to 'market opportunity' (used as a 'measure' of potential rather than a 'predictor' of success), the greatest capability appears to be associated with 'larger' size, and the least capability with 'smaller' size. The scale of an association's organisation would appear to be a better 'predictor' of likely position on the 'capability' continua of Table 14.2 than 'status' categorisation as a 'status-seeking' or 'status-maintaining' association.

Increasingly, the governing bodies (or 'Councils') of occupational associations are having to balance and reconcile the needs of society, client or customer groups and their own members. Perhaps insufficient attention has been given to this latter set of relationships. Still less attention has been given to the relationship between an association and its own employees. The management process employed by an occupational association should enable it to develop an understanding of, and help it to address, the distinct needs of each of the groups with an interest in it.

**TABLE 14.2****Assessed Association Capability Relative to Management Challenges**

<u>Challenge</u>	<u>Continua of Association Capability</u>	
	<u>Greatest Capability</u>	<u>Least Capability</u>
Market Opportunity (Section 14.2)	ICA, IOD, ICSA, BIM, IM, IPR, BGA, CAM, SCCA, BBGS	
People (Section 14.3)	ICA, IOD, BIM, ICSA, IM, IPR, CAM, SCCA, BGA, BBGS	
Organisation (Section 14.4)	ICA, ICSA, IOD, IM, BIM, BGA, IPR/CAM, SCCA, BBGS	
Technology (Section 14.5)	ICA, ICSA, IOD/BIM/IM, SCCA, IPR, CAM, BGA, BBGS	
Management Process (Section 14.6)	ICA, IOD/BIM, ICSA/IM, SCCA, BGA, IPR, CAM, BBGS	



Confronted by a more dynamic market environment, more demanding and skilled people, a rapidly evolving technology with multiple impacts, and the need for a more flexible form of organisation, the management process employed within occupational associations is likely in future to approach more closely that found in commercial organisations. To operate such a management process a new breed of association manager may need to be employed.

At the top of the occupational association management organisation, and supported by a balanced management team and appropriate technology, one may find more of a 'chief executive' and less of a 'Secretary', 'Administrative Director' or 'Secretary-General'. To recruit and retain such a person may necessitate a closing of the gap between occupational association salary scales and the levels of remuneration offered by commercial companies.

An effective (and in particular flexible and responsive) partnership of association governing organ and 'chief executive' and team may also require the transfer of authority to the internal 'management team' from the elected members serving on the governing organ.

Two themes emerge throughout this chapter. Switching the emphasis of study (in Chapters One to Thirteen) from 'status categorisation' to the management requirements for commercial success in relation to 'market opportunity', one senses a 'scale' threshold emerging between associations that are large enough (eg ICA, IOD, ICSA, BIM, IM) and those that are too small (eg BGA, BBGS, SCCA, IPR, CAM) to sustain a 'viable role', recruit 'high level' staff, offer career-development opportunities, or equip with appropriate technology. This 'scale' categorisation cuts across the study's initial 'status' categorisation as 'status-seeking' or 'status-maintaining'. Secondly, the question has been raised of whether there may be a 'tension' (if not a conflict) between the requirements, demands and obligations of 'chartered' status and the requirements of satisfying shifting 'market' requirements. The process of professionalisation may lead in a different direction to the path of commercial success.

The implications of these developments for the future study of occupational associations operate at a number of levels. One is likely to observe different policies emerging and new processes by which these policies are formulated and novel and more commercial means by which they will be implemented. It may, in future, no longer be sufficient, in order to further understanding of occupational association attitudes, values, policies and activities, to concentrate study upon association governing organs and the relationship between an association, its members and society. One may also need to focus upon the attitudes, values and policies of the 'management teams' of associations and their relationship with an association in terms of their interaction with its governing organ.

Two final areas of 'future' study, arising out of this chapter, are the extent to which associations reconcile the cultural, organisational and management process demands of 'chartered' status with those required for commercial success, and the question of whether 'independent' of formal 'status', there is a 'scale' threshold of occupational association 'organisational viability'.

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References cited in Volume Three, namely the Appendices of this dissertation, are given in Volume Four.

To avoid lengthy repetition of the full names (particularly in the case of references to the Appendices relating to such documentary evidence as minutes and publications cited) of the professional associations that have been the subject of study, these associations are identified by means of the initials given in Section 3.3 of Chapter Three (eg BGA for Business Graduates Association).

For ease of reference, a new page is started in the presentation of the references of most chapters.

Within the presentation of references for each chapter, the full title of a publication, the name of the publisher and year and place of publication is only given on the first occasion a publication is cited. In subsequent references to the same publication, the name of the author and date of publication only is given (eg Coulson-Thomas, 1980) followed by 'op cit' or 'ibid', and a page reference if appropriate.

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