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Key takeaways and insights from

SURGE forward

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About SURGE Forward

Association professionals from around the world gathered — virtually — for SURGE Forward, a three-day virtual conference presented by Sidecar on June 8, 9 and 10, 2021.

The event allows association pros to learn actionable insights from top experts, connect with association pros from around the world and be empowered to move their organizations forward.

Professionals come to SURGE to meet people who can help them meet their career goals. Our speakers were association professionals who understand others' struggles. In 2021, we talked about the technologies, ideas and opportunities that will change membership forever as we all looked to find balance and a new normal after the COVID-19 pandemic that arrived in 2020.

As in past years, SURGE forward represented a better virtual experience where every voice was heard thanks to the interactive live chat and community-driven content development.

What follows here are key takeaways and insights from each SURGE session, the replays of which are available exclusively to Sidecar members.

Learn more about membership at www.SidecarGlobal.com!

Meet the speakers

Alex Bartholomaus

Alex Bartholomaus started People Stretch Solutions, a DC-based management consulting firm, in 2009 to help CEOs scale their organizations. Alex is a published author and professional speaker on the topics of OKR, Sales Effectiveness, Elite Business Performance and Emotional Intelligence.

Alex began his career at Billington Imports, a family business which he grew from $1MM to $37MM in revenue over a 15 year period before a successful exit in 2009. Billington was a category leader in South American wines and during his tenure Alex started the Big Tattoo Wines project, donating over $1million to hospice and breast cancer research charities.

Celia Trigo Besore

Celia Trigo Besore has over 20 years of experience in not-for-profit organizations. In November 2018, she became the Executive Director of The Monitoring Association, previously known as the Central Station Alarm Association (CSAA). Before her latest promotion at TMA, she worked for the Association from 1999-2010 as Vice President of Marketing and Programs and from 2017-2018 as Vice President of Membership & Programs. In 2010, she left then-CSAA to become the Executive Director & CEO of the National Association of Hispanic Nurses (NAHN), a professional association representing the interests of Hispanic nurses and those of the Hispanic community as it relates to health. She is a member of the Security Council of Underwriters Laboratory (UL).

In addition to her work experience, she has a Master in Business Administration from George Mason University with emphasis in Strategic Management and Marketing. She received her American Society for Association Executives (ASAE) Certified Association Executive (CAE) certification in May 2008 and is a 2010-2012 ASAE Diversity Executive Leadership Program (DELP) scholar.

Cynthia Simpson

Cynthia (Cindy) Simpson, M.Ed, CAE is the former Manager, Member Services with the National Society for Histotechnology. Cindy was responsible for all areas of membership, including development of recruitment and retention plans, analysis of data, and implementation of various engagement strategies. With over 25 years of association management experience, Cindy has worked in a variety of positions in both trade and professional associations and enjoys the challenges and opportunities provided by working in a non-profit environment. She has written several articles and given numerous presentations at scientific conferences, university forums, and corporate events on the topic of work-life satisfaction. A graduate of Syracuse University, she earned her certified association executive (CAE) credential from the American Society of Association Executives (ASAE) and currently serves on the ASAE Membership Professionals Advisory Council, the ASAE Gold Circle Awards Committee, the National Postdoctoral Association Advisory Council, and the Virtual Association Network Task Force.

Twitter: @CindySimpsonCAE
Instagram: clsimpson1

Danielle Duran Baron

Danielle Duran Baron is on a mission to change organizations through storytelling, open communication, empathy and inclusion. As an association executive, she has helped organizations build solid brands, create inclusive environments, and maximize their impact and efficiency. Currently, she is the Staff Vice President of Marketing and Communications at the School Nutrition Association (SNA), where she oversees the development and implementation of the marketing and communication strategy to enhance and protect the SNA brand.

For more than two decades, Danielle has worked in the private, public and nonprofit sectors, helping global organizations find their ideal positioning and authentic voice. Her expertise lies in strategy, marketing, experience design, storytelling and DEI.

She holds a master's degree in journalism and an MBA in marketing and is fluent in Spanish and Portuguese. Danielle is the Vice-Chair of ASAE's Government Relations and Advocacy Professionals Advisory Council, a DELP Scholar and a certified association executive (CAE). She is also a board member of FIRN, a Maryland-nonprofit helping immigrants thrive in their communities and the Co-Chair of Alianza Latina, a workgroup created by the County Executive Office to address many of the concerns and struggles of the LatinX and immigrant community in Howard County, MD.

Debra BenAvram

Debra BenAvram, CAE is the Chief Executive Officer of AABB, headquartered in Bethesda, MD. AABB, formerly called the American Association of Blood Banks, is an international organization focused on advancing transfusion medicine and cellular therapy worldwide. AABB is an $18M non-profit association with both organizational and individual members, including blood collectors, hospitals, transfusion medicine physicians, med techs, and biotherapies experts. She has a strong passion for the design of staff and volunteer models and cultures to support connections and integration among team members and elimination of silos. Debra frequently presents on topics including organizational culture, performance management and innovative approaches to cultivating collaboration, communication, a valued work andenvironment and strong member community. Debra is an Fellow of the American Society of Association Executives (ASAE) and is a past member of the ASAE Board of Directors. She also is on the Board of Directors for the Center for Survivor Agency and Justice, a national organization dedicated to enhancing advocacy for survivors of intimate partner violence. Debra lives in Bethesda, MD with her husband Vincent, son Lev (17), daughter Paz (9), and their loveable pups, Masha and Zissel.

Don Dea

Don Dea is the co-founder of Fusion Productions and digitalNow, an executive summit for association and non-profit leaders. Don has authored several books published by the ASAE Foundation on the internet, digital transformation and online education, as well as articles on technology, healthcare 2020, mobile, technology innovation, and association leadership and governance.

Donté P. Shannon

Donté P. Shannon, FASAE, CAE, an association CEO and also an account executive with AMPED Association Management. Prior to his current role, Donte served as Executive Director/CEO of the Specialty Advertising Association of California. Donté is a highly recognized influencer in the association community, having presented over 20 association management presentations, ranging in topics from strategic leadership and organization rebranding, to career development for young professionals. Donte is a strong advocate for diversity, equity and inclusion and enjoys giving back to the various communities and industries he touches.

Elisa Pratt

Elisa Pratt, MA, CAE, CVF is an association guru and expert in strategic nonprofit solutions that increase membership, diversify revenue, and ensure relevance. Prior to founding Brewer Pratt Solutions, Elisa served for nearly 20 years as an impactful association executive with trade and individual membership associations, both domestic and international. Known for her candid and hyper-custom approach, Elisa architects innovative engagement solutions, tactical member development campaigns, and operational effectiveness strategies. Elisa has a track record of transformative success and also specializes in lean facilitation, member journey mapping, strategic planning, revenue stream evaluations, business plan development, leadership training and development.

Elisa is a Certified Association Executive (CAE), has earned her Certified Virtual Facilitator™ designation from the International Institute for Facilitation (INIFAC) and holds a Master's from Johns Hopkins University. As a thought leader in the association space, Elisa founded and co-hosts the Association Transformation Podcast, a weekly conversation advancing issues and innovations from nonprofits around the world. Elisa also serves as a strategic advisor to the Institute for Association Leadership (IAL), has developed curriculum for AssociationTrends.com and AssociationSuccess.com, and has delivered presentations for the American Society of Association Executives (ASAE), Nplace.org, the IAL's Focus Forum, and the Virtual Association Network (VAN).

Eva Pryzgodzki

Eva Przygodzki, the Chapter Engagement Manager at the Society for Fire Protection Engineers, is responsible for managing SFPE's global network of over 110 chapters, including SFPE Europe. Originally from Poland, Eva attended State College of Foreign Languages & Applied Linguistics. In December of 2019 she earned her CAE title. Studying for the CAE exam has broadened Eva's knowledge regarding various aspects of leading a non-profit association immensely. When she needs to unwind, Eva either trains agility with her standard schnauzer, or goes figure skating at her local rink. She also likes to volunteer at the local animal shelter, and freelance as a translator-interpreter.

Juan Amador

Juan Amador, CAE, has extensive experience in association management. Mr. Amador is currently a director of constituent engagement at the Association of American Medical Colleges (AAMC). He is a critical leader in the AAMC's relationships and partnerships with its many constituent groups. In managing these relationships, he advances the strategic value of the association for its constituents and members. He is also responsible for implementing learning and leadership opportunities that help members grow in their professional roles, enhance their career development, and strengthen their leadership competencies. Mr. Amador was the previously in the AAMC Equity, Diversity, and Inclusion unit and directed the development of programs, tools, and resources that advanced diversity and inclusion for the faculty, staff, residents, and students at U.S. medical schools.

Mr. Amador has over 15 years of experience in recruitment and outreach to special populations, strategic planning, developing partnerships, and facilitating the work of national committees. Prior to joining the AAMC, Mr. Amador worked for the National Prevention Information Network (NPIN) of the Centers for Disease Control and Prevention (CDC). He earned his B.A in Health Science and Policy at the University of Maryland Baltimore County, and he is a certified association executive.

Justin Bradley Reyes

Justin Bradley Reyes, is an advocate for underserved & vulnerable communities with 6 plus years of Association Management experience. His passion for advocacy, professional development, and networking has led him to engage in over the last 16 years as a volunteer leader and member within many nonprofits. It is through these experiences that have driven his passion of curiosity to ask questions, dive deeper on complex topics, and engage in professional organizations to find solutions.

Today as the director of business development for the Associated Builders and Contractors Heart of America chapter, Justin is responsible for growth in the commercial and industrial construction industry through Membership and Business Development and volunteer management in the states of Kansas and Missouri.

A former agriculture science teacher in Texas, Justin has had experience in developing curriculum, supervising student project animals, establishing relations with industry leaders and enhancing youth leadership.

Justin currently serves as President of The Young Latino Professionals of Kansas City, and commits time on the ASAE - Young Professionals Advisory Committee, KC Society of Association Executives Awards - Committee, The Greater KC Hispanic Collaborative - Board, and is a UMKC Avanzando Latino Mentor. Justin earned his B.S. in Agricultural Science at Texas A&M University.

Lowell Aplebaum

Lowell Aplebaum, FASAE, CAE, CPF is the CEO and Strategy Catalyst of Vista Cova — a company that partners with organizations on strategic visioning and planning, creating stronger stakeholder connections, and reimagining value and engagement. As an IAF Certified™ Professional Facilitator, Lowell frequently provides dynamic sessions to organizations - getting volunteers, members, and staff involved through experiential learning approaches.

After starting his career in the informal education realm, over the course of more than a decade, Lowell has worked inside associations on membership and value, volunteer leadership establishment and growth, professional development and learning, global alliance building, communications and marketing, online and in-person communities, operations, finance, HR, and staff oversight. After serving as the Chief Operating Officer for a medical association, Lowell founded Vista Cova — returning to his passion of facilitating for and partnering with volunteer leaders, members, and staff.

Lowell currently serves on the ASAE Research Committee and is a past Chair for the overseeing commission for the Certified Association Executive (CAE) credential. He chaired ASAE's Task Force on CEO Pathways, and previously served as Chair for ASAE's Component Relations Council. He is the creator of a master-level learning series, Through the CEO Lens, and Association Charrette — a co-creation retreat experience. He is the co-Executive Editor and Contributing Author for ASAE's Component Relations Handbook, 2nd edition, and contributed chapters to the latest versions of Professional Practices of Association Management as well as Membership Essentials. He is a mentor for ASAE's Diversity Executive Leadership Program and recently served as a facilitator for ASAE's Centennial Recognition Task Force. His work on global efforts for associations includes experience across five continents, hundreds of volunteer groups, and all 50 states in the U.S.

Lowell also volunteers as a platelet donor and social media solicitor for the American Red Cross and is a member of the Cystic Fibrosis Foundation's Brewers Ball organizing committee. Lowell has a B.A. in Sociology from Columbia University and utilizes the knowledge he gained from his M.A. in Education to volunteer and tutor students with learning disabilities. Lowell resides in Maryland where his 9-year old son and twin 8-year old girls keep the house full of laughter.

Marcus Sheridan

Marcus Sheridan is a highly sought-after international keynote speaker known for his unique ability to excite, engage, and motivate audiences.

In 2017, Forbes named Marcus "One of 20 Speakers You Don't Want to Miss." He has been dubbed a "Web Marketing Guru" by the New York Times and featured in Inc., The Globe and Mail, Forbes, and many more.

As an owner of IMPACT, Marcus has established one of the most successful digital sales and marketing agencies in the country. Within his speaking company, Marcus Sheridan International, Inc., he gives more than 70 global keynotes annually where he inspires audiences in the areas of sales, marketing, leadership, and communication.

Mashable rated his book, They Ask, You Answer, the "#1 Marketing Book", and Forbes listed it as one of "11 Marketing Books Every CMO Should Read."

Learn more at MarcusSheridan.com.

Michael Tatonetti

Dr. Michael Tatonetti is a Certified Association Executive and Certified Pricing Professional on a mission to advance associations in their pricing models for financial sustainability. As the Founder of Pricing for Associations, he and his team work with associations to harmonize pricing and value across membership, education, sponsorship, events, and marketing. He is also the Vice President of Professional Pricing Society, overseeing strategy for education, marketing, membership, and sponsorship. Dr. Michael is a proud Association Forum Forty Under 40 honoree for his dedication to the association field. You can learn more about the work his team is doing at www.pricingforassociations.com.

Michelle Lui Lord

Michelle Lui Lord, CAE serves as Executive Director of Financial Management Association International (FMA), a professional association dedicated to disseminating and developing knowledge about financial decision making. In this role, she is responsible for the successful leadership and management of the organization and oversees the implementation of various programs for academicians, practitioners, and students. Michelle is an active volunteer in the nonprofit sector and currently serves as a CAE Commission member, a special affiliate of the Center for Financial Policy, an organizing committee member for the Tampa Bay Gasparilla Distance Classic, and a regional team leader of the Franklin & Marshall Admission Network. She is also a member of the Diversity Executive Leadership Program (DELP) 2016-2018 Class. From 2014-2017, she served as a member of the Institute of Certified Management Accountants (ICMA) Board of Regents. Michelle holds an MBA from Johns Hopkins University, a bachelor's degree in Business Administration from Franklin & Marshall College, and is also a Certified Associate in Project Management (CAPM).

Mike Moss

Mike Moss, CAE, is the president of the Ann Arbor based Society for College and University Planning (SCUP). In collaboration with the Board of Directors, he is responsible for providing leadership and vision for the organization and guiding the development and implementation of the strategic plan, programs, policies, and practices of the society.

SCUP develops individual and organizational planning capacities to strengthen and transform institutions of higher education. SCUP advocates an integrated planning approach that engages all sectors of the institution — academic affairs, student affairs, business and finance, campus planning, IT, communications, and development.

Prior to SCUP, Mike served as chief operating officer and senior director of operations and education at several international associations. His past positions have provided him with a broad range of experience, from organizational design and strategic planning through certification management and member relations.

Mike can be reached at 713-824-7358 or through his Twitter feed @SCUPprez.

Nikki Golden

Nikki Golden, CAE, is a strategist with Association Laboratory, which helps associations make strategic business decisions — on everything from membership, to strategic planning to educational programming/certification — using state-of-the-art research. Previous to this position, she was the executive director of the International Society for the Advancement of Spine Surgery.

Nikki has been recognized for her work in the association world, making the inaugural list of Association Forum of Chicagoland/USAE Forty Under 40 list. Nikki is an active member of Association Forum of Chicagoland, where she has served on the Editorial Working Group and Content Planning Committee, chaired the CAE Working Group and Membership SIG. She also frequently facilitates for the Association Forum's CAE Study Course and its Association 101 program, has presented at Forum Forward and has been a contributor to FORUM magazine. Nikki is also active in ASAE, serving this year on its Membership Marketing Council.

Nikki built her association career working in both marketing and membership, with the National Association of the Remodeling Industry and the National Roofing Contractors Association.

Pamela Kaul

Pamela offers three decades of experience in executive search, transition management, and organization development. As President & Founder, she pioneered ASI's unique systems-based approach to executive search, and since founding the company in 1986, she has successfully applied it to deliver superior talent to hundreds of leading associations, foundations, NGOs and philanthropic institutions. A recognized specialist in organizational assessment and development programs, Pamela has piloted hundreds of clients through CEO and Board organizational assessments, Board recruitment, and paradigm shifts requiring business acumen, cultural sensitivity, and awareness of the uniqueness of individual environments.

After leading human resource development (HRD), business operations, and major change efforts for several large, Washington-based trade and professional associations, Pamela launched her executive search career in 1983 with a national recruiting firm. Recruited by the firm to open and staff a new division, Pamela successfully expanded its practice into the nonprofit arena. For nearly two years she was a member of ASAE's executive management team retained to launch an HRD program and a transition in staff culture.

Recognized as a leader in the field, Pamela was awarded ASAE's Industry Partner of the Year in 2011, is a founding member of the National Non-Profit Search Consultants (NNSC), and has recently spearheaded a major research initiative, Leadership 2020, to identify CEO competencies for effective nonprofit leaders in 2020. The first of its kind, the study surveyed three groups: emerging leaders, current CEO's and volunteer leaders. Preliminary findings were released, with several study groups and a toolkit to follow in the months ahead.

Pamela served a 3-year term on the Nominating Committee for SCORE, currently serves on the boards of the Guide Dog Foundation/America's Vet Dogs, and Strings, a performing arts organization., and is an industry advisor to Boards, Committees and CEO's. She is a frequent speaker and presenter for business and professional organizations and a requested presenter at national conferences and national/international meetings. A former columnist for Associations Now, formerly Association Management magazine, Pamela has also written on career management executive search and succession planning. Pamela's passion for promoting the continuing growth and success of nonprofit organizations and the missions they serve, her commitment to continual learning and testing the status quo make Association Strategies, Inc. what it is today: a leader in guiding organizations through leadership succession, transition and change.

Pamela has many personal passions, namely, industry research and the creation of new models of practice, a number of philanthropic causes and a home in the mountains of CO. She holds a BS degree in Communications from the University of Tennessee in Knoxville and splits her time between Chicago, IL and Alexandria, VA.

Richard Yep

Richard Yep, CAE, FASAE is the Chief Executive Officer of the American Counseling Association, the largest membership organization of professional counselors in the world. He currently oversees a staff of 60 and a $14 million budget. ACA has more than 52,000 members. Rich has worked for ACA for 31 years, 21 of which as the Association's CEO. He is also the President of the American Counseling Association Foundation. Rich has presented on various issues impacting not-for-profit organizations relative to public policy, leadership development, product development, and association management. Rich is ACA's representative to the United Nations Non-Governmental Organizations. He currently serves on the organization's Executive Committee. His professional affiliations include the American Society of Association Executives (ASAE) where he is a past Chair of the organization's Committee on Diversity and Inclusion, completed a term on the ASAE Board of Directors, and was named an ASAE Fellow in 2012. In 2017, he received ASAE's Key Award which honors an association CEO who demonstrates exceptional qualities of leadership in his or her own association and displays a deep commitment to voluntary membership organizations as a whole. Currently, Rich is on the CAE Commission and is a member of the Key Professional Associations Committee. For ten years Rich served on the Board of Trustees of Excelsior College, an institution based in Albany, New York that is dedicated to adult learners. His support of Excelsior is rooted in his personal experience in working with individuals facing personal and professional challenges, but who are dedicated to improving their lives through education. Rich is a Chair Emeriti of the board. During the July 2018 Commencement, Rich was recognized with an honorary doctoral degree from the College. Rich holds an undergraduate degree from the University of California, Santa Barbara and a Masters in Public Administration from the University of Southern California. Rich and his wife Mona reside in Alexandria, Virginia with two yellow Labradors. He has a son, Dylan, who is a software developer in San Francisco.

Robbie Kellman Baxter

Robbie Kellman Baxter is a consultant, author and speaker. She is also the author of The Membership Economy and The Forever Transaction, and hosts the podcast Subscription Stories. Robbie has more than 20 years of experience providing strategic business advice to major organizations, including Netflix, Fitbit, Microsoft and Consumer Reports. She has been focused on subscription and growth strategies for the past decade. Baxter has been featured in the Wall Street Journal and on CNN. She earned her MBA from the Stanford GSB, and graduated with honors from Harvard College.

You can find more about Robbie on her website https://robbiekellmanbaxter.com/

Sarah Trahern

With extensive television and executive experience and a deeply-rooted passion for Country Music, Sarah Trahern is perfectly suited for her role as CEO of the Country Music Association. She has oversight of three, highly-rated network television specials; one of the biggest Country Music festivals in the world; and she is President of the CMA Foundation, which supports music education initiatives across the U.S. A graduate of Georgetown University with an MBA from the Owen Graduate School of Management at Vanderbilt University, Trahern has more than 30 years of experience in the TV industry, including 22 years producing and creating Country Music content. She began her career at C-SPAN in Washington, D.C. covering politics and public affairs, before moving to Nashville in 1995 to oversee specials and entertainment series for TNN. In 2005, she joined Great American Country, where she was quickly promoted to SVP of Programing and in 2010 became General Manager of the network. She was named CEO of CMA on Jan. 1, 2014 and has earned a reputation as a leader with vision who values relationships. Trahern was recently recognized as one of the Nashville Business Journal's Most Admired CEOs and was named "Executive of the Year" in Billboard's 2017 Country Power Players list. She also serves her community through associations with the Monroe Carroll Children's Hospital at Vanderbilt, Georgetown University's Baker Scholar program, the Country Music Hall of Fame, the Nashville Convention and Visitors Corporation (NCVC), Nashville Mayor's Music Council, Leadership Nashville, Girl Scouts of Middle Tennessee, and the 2018 NFL Draft Committee.

Shameka Jennings

Shameka Jennings, MTA, CMP, DES is an award-winning meeting and events association professional with over 8 years of industry experience. She is currently the founder of EventsNoire, an event planning and consultant business that specializes in coordinating and managing all aspects of in-person, virtual and hybrid events for nonprofits, associations and corporations.

Sudip Parikh

Sudip Parikh, PhD, AAAS became the 19th CEO and executive publisher of the Science family of journals in January 2020. The son of Indian immigrants who worked in the textile and furniture manufacturing plants of North Carolina, Parikh completed undergraduate studies at the University of North Carolina at Chapel Hill. Early in his career Parikh was a Presidential Management Intern at the NIH and was awarded a National Science Foundation Graduate Research Fellowship while earning his Ph.D. in macromolecular structure and chemistry from the Scripps Research Institute in La Jolla, California. He has spent two decades at the nexus of science, policy, and business and is an active member of the scientific advocacy community. Parikh serves as a board member and officer for several impactful organizations, including Research!America, Friends of Cancer Research, and ACT for NIH.

Temi Adewumi

Temi has over 20 years' experience implementing technology for membership associations. She has managed projects such as website overhauls, data migration and software selection. She runs TAGb Consulting, which helps associations select and implement such tools as membership management systems and CRMs. Temi is an advocate for small associations, which often have to do more with less. She is passionate about helping small organizations become more nimble by using technology to save time and money and automate their administrative tasks.

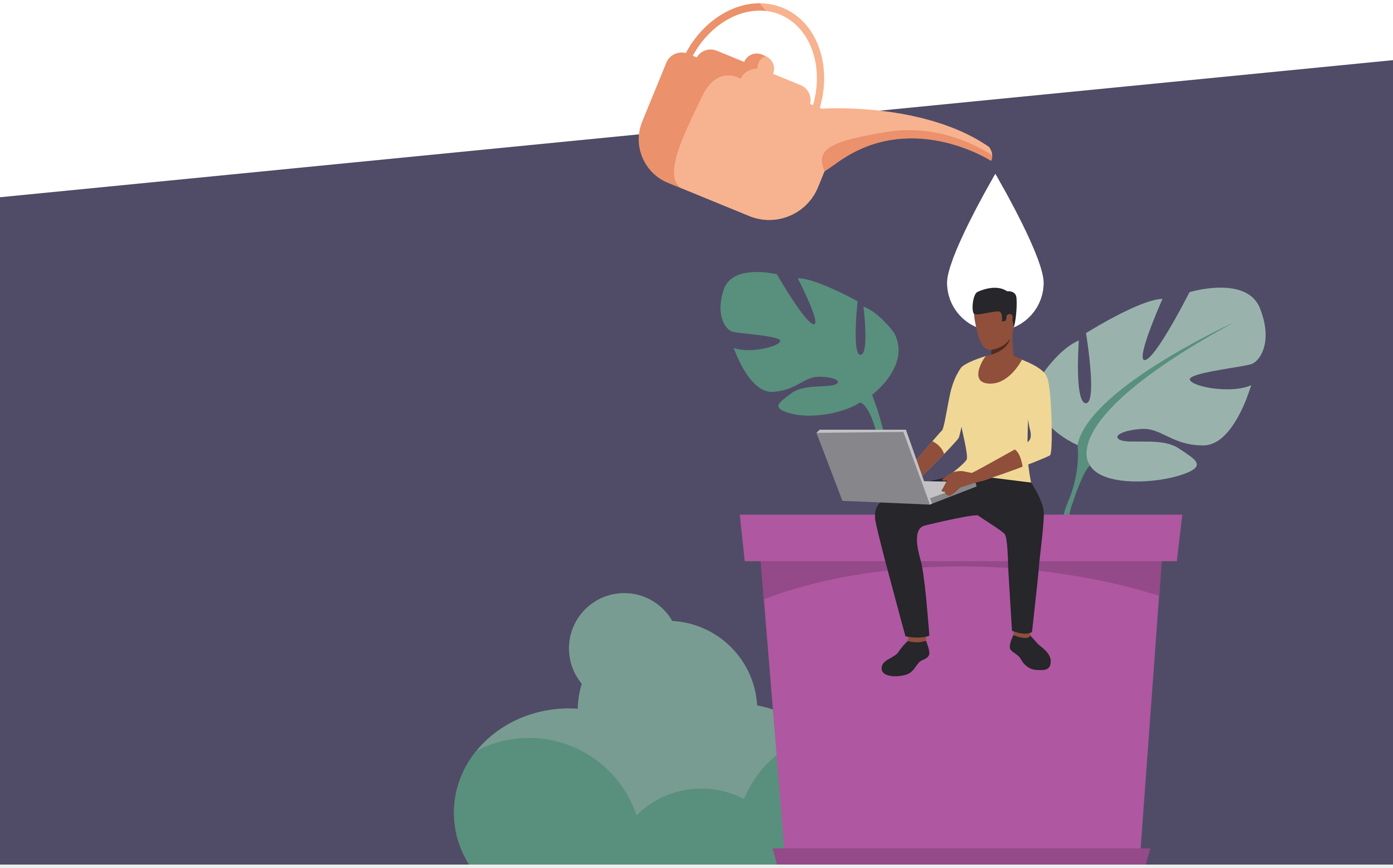
Thomas Altman

Thomas Altman loves exploring the intersection between Data Science and Assocations. Thomas first fell in love with Data Science while getting an MBA with a concentration applied Machine Learning. During that time he not only learned about cutting-edge analytic techniques but how those techniques can be applied to real-world business settings to solve complex problems. After graduating, Thomas began working with Associations and spent nearly a decade understanding the problems they face and how technology could revolutionize their value. Thomas has dedicated his career to learning how to help Associations apply machine learning techniques in innovative ways so that they can continue to grow.

Tiffany Kerns

Tiffany Kerns oversees CMA's nonprofit arm, the CMA Foundation, as Executive Director and recently added Vice President, Community Outreach to her role, creating and implementing CMA's community outreach initiatives including the CMA Foundation as well as CMA EDU, the organization's collegiate development program. She also oversees CMA's membership practices and programming to ensure transparency and integrity for CMA Awards voting, including the CMA Awards, CMA Touring Awards, CMA Triple Play Awards and various CMA industry awards. Kerns also provides strategic direction and management of CMA membership development, evaluating the effectiveness of existing structures and developing strategies to ensure effective membership recruitment and retention.

Prior to joining CMA in 2012, Kerns worked for the Cystic Fibrosis Foundation. She is a 2018 Women in Music City Award recipient and led the CMA Foundation to receiving the 2017 National Stand for Music Award supporting music education advocacy. Originally from Bradenton, FL, Kerns graduated from University of Tennessee — Knoxville with a degree in political science and a minor in business administration.



Section 1:

Emerging trends and the new best practices in the membership economy

by Suzannah Kolbeck

Now more than ever, the future is built on relationships. If the past 15 months have taught us anything, it's that how we do business has less to do with the bottom line and is more about the people who are on the journey with us.

Subscription expert and author Robbie Kellman Baxter reminded us at SURGE Forward that now that the end of this extraordinary time of the coronavirus pandemic is in sight, more changes are on the way. That's why it's even more important to lay off the brake, to step on the gas, and to continue to innovate and develop your membership and subscription services.

With relationships at the core of everything you do, here's how to optimize your membership and subscription offerings to attract, engage, and retain your members in 2021 and beyond.

The membership economy in the COVID era

The membership economy has grown, even in the years before COVID. The membership and subscription model works to build forever relationships by doing the following:

- **Changing the focus from the single transaction to the long-term relationship**
- **Transforming revenue from a single large payment to multiple smaller payments**
- **Encouraging conversations between the organization and the members themselves**

The membership economy is about how everybody in your organization treats the people you serve. Whether your organization is new to the membership economy or an old pro with a seamless program, business is changing and will continue to do so as we emerge into a "new normal."

Been there, done that: adapting to the membership economy

Consider it a compliment that other organizations are increasingly focusing on treating customers like members - something that you have been doing for ages.

It has never been easier to build sophisticated, engaging experiences for the people you serve. Whatever you can imagine is possible with technology. There are off-the-shelf solutions and vendors to help you implement and analyze your results. It's a great time to experiment.

The other good news is that consumers and businesses have never been more receptive to new ways of doing things. The world has been operating in a 15-month grace period, with permission to innovate and make mistakes while our members are willing to try new ways of getting things done.

But the bad news? The market for membership is crowded and noisy right now. This can lead to "subscription fatigue" that impacts long-term relationships with your members and subscribers (more on that below!).

> *Elena Gerstmann, INFORMS:* **"This reminds me of the psychology of choice work. Giving folks too much is overwhelming and makes people feel bad."**

The anatomy of a new beginning

Wherever you are in your journey of membership, you can establish, deepen, and expand your relationship with new and returning members.

Consider this in three phases.

Phase 1. Launch

Launch is the beginning. You are:

- **Finding product/market fit**
- **Building support from your organization**
- **Setting expectations**
- **Getting clear on the forever promises that you're making to your members**

This phase drives loyalty. Build trust here so members stay with you as you experiment and innovate.

Phase 2. Scale

Scale transforms the culture of your organization. The focus here is on recognizing the importance of engagement and retention (not just acquisition).

Key aspects of this phase include:

- **Building technology to support your offerings**
- **Developing pricing**
- **Defining metrics to measure success**
- **Thinking about mergers/acquisition**

Phase 3. Lead

The final stage is all about resisting shortcuts.

Your long-term loyal members want you to continue to hold yourself to the high standards you set early on. Continue to innovate. Continue to provide value.

Your forever promise stays constant, but how you deliver on that promise is going to change.

- **Stay "forever young" in your offerings**
- **Keep a global perspective**
- **Look at trends and changes to what people actually need**

It helps to view your memberships through a microscope and a telescope. Focus both on the needs of your long-term members (microscope) as well what's going to drive new members to join (telescope). A balance of these two visions will drive growth and continue to foster deep, trusting relationships with all members.

Combating subscription fatigue

There are three big culprits that drive subscription fatigue. Each has a unique solution that can serve both you and your members.

1. Poor product/market fit

When the membership doesn't fit the offering with the audience, people will begin to question why they joined in the first place (and why they are staying once the thrill is gone). Maybe the headline benefit that attracted members during COVID is no longer necessary or relevant.

The solution to this is simple: evaluate your benefits and offerings and adapt. Look for new ways to deliver on that forever promise you made to your customers.

2. Member guilt

Member guilt occurs when your customer loves your extensive benefits but feels bad for not using them. Contrary to popular opinion, having too many benefits drives cancellation just as much as not having enough.

Take stock of your membership. Balance the right-size offering for your members with their needs. Be disciplined about what you offer. Consider what you need to add or remove so that it's not overwhelming and every benefit is truly valuable.

3. Hiding the cancel button

It may seem like a good strategy to hide the cancel button, but this is another driver of subscription fatigue and a poor model for community relationships.

In the short-term, hiding the cancel button may result in a spike in revenue. In the long-term, it hurts your brand. People who experience challenges trying to cancel share that experience. The end result? If potential members know it's going to be hard to cancel, they think twice before joining.

Be like Netflix, with their 25 billion dollars in revenue in 2020 and their "cancel anytime," monthly subscription. Be transparent. Make it easy to cancel.

> *Robbie Kellman Baxter:* **"There's a challenge that arises when what used to be worth paying for becomes available for free (or a substitute becomes available for free). Then you are no longer delivering on your promise in the "best way" -- it's a moment to adjust your own offering."**

What’s next for memberships

The offering and the way you deliver value has to continue to evolve all the time.

As the world opens up again, there is still a lot of uncertainty. Now is the time to really keep your eye on engagement and member retention. As we move into this new normal, how can you continue to serve people so that they stay engaged?

Organization

In your organization, be thinking about how to optimize the roles you have to better support serving your members. What functional areas overlap, how can they re-organize accordingly?

This re-organization emphasizes sustainable growth that balances acquisition, engagement, and retention to optimize revenue and membership.

Utilizing the whole “funnel”

Consider the shape of a funnel. If the neck is traditionally where the transaction occurs, the bowl of the funnel is where your transaction actually begins. This is the place where you are building deeper connection and loyalty — before customers actually sign up for your product or service.

Looking at the relationship this way avoids the crush in the neck of the funnel and makes the entire transaction more comfortable.

Pricing

Looking at pricing as a tactic, not a strategy. If customers are hesitant to sign up, is there a place for a lighter membership? Is there a premium offering that people can experience before they are spending money with you?

Make your pricing as simple as possible. Make it easy for people to sign up and recognize the value that they’re getting. This helps them relax into their subscription (and avoids subscription fatigue).

> *Shayna Varner, Pennsylvania Health Care Association:* **“It’s a no for me when you attempt to take advantage of a “free trial” but you’re required to input payment information to get access to said free trial.”**

Changing “freemium” offerings

In 2020, a sense of social responsibility for the community resulted in many organizations providing free services to help people who were suffering. Now’s the time to evaluate what should stay free and how to ease back into payments.

Onboarding

Considerate onboarding sets the stage for a long and productive relationship with customers.

If your organization establishes the right habit when somebody first engages with you, that’s going to pay dividends down the road.

The best way to improve retention, even through turbulent times, is by helping customers to

- **Identify ways to get the most value**
- **Become the most connected**
- **Make the best use of your products/services**

This help in the beginning decreases the chances of cancellations later on.

Customer success

When you offer subscriptions as a service instead of as a product, it becomes more important to make sure that customers are using the product that they’re paying for.

This moves from customer support to customer success.

- **Customer support: Reactive, the idea of fixing something that’s broken or solving a problem when someone complains**
- **Customer success: Proactive, reaches out to new customers, explains how they get the value from their subscription, and commits to doing everything possible to make sure that they’re delighted and engaged**

Unlike customer support that’s episodic and uncertain, customer success is a disciplined, daily practice.

> *Jordana Taylor, National Student Affairs Administrators in Higher Education:* **“This was great -- you really validated a lot of what I shared with my team.”**

Technology

Every organization is a technology organization. It's no longer okay for anyone in the organization to say they aren't technical. Right now, it's clear that the technology piece is not just a supporting function, a wrapper for the value — it is the value.

This is really important both in terms of making sure everyone in the organization understands this and has a level of tech literacy that allows them to work proactively for an excellent user experience.

The membership economy and the new normal

If there's one thing to remember from the last 15 months it's this: you need to love your customers and their mission. This includes valuing what they're hoping to do on their journey more than any particular product you have or any feature you're offering.

More than anything you offer, the relationships you build as we move into the future will sustain your organization — through this crisis and whatever comes next.

> *Ioannis Pallas, ESAE:* **"I find that members and stakeholders are less forgiving with technology hiccups in 2021 than in 2020."**

Section 2:

Why now is the time to change your pricing strategy (and how to do it!)

by Suzannah Kolbeck

The past 15 months have put a damper on discussions surrounding pricing strategies. Many associations have chosen the path of social responsibility and dramatically reduced pricing on many of their offerings to keep providing support and services to members who are struggling. As we ease back into the world, now is the time to change your pricing strategy. Here's how to do that.

> *Jessica Ercolino, American Society of Hand Therapists:* **"We do a pricing audit every three years to determine whether an increase would appropriate."**

Why change your pricing strategy now?

Many associations tend to look at pricing conversations as greedy. It's good to give value, but it's harder for us to set pricing based on that value. We often think that pricing (especially price increases) goes against being a purpose-based organization that's trying to do good — but that's not the reality.

The reality is that correct pricing is all about financial sustainability. Pricing is the biggest lever to impact your bottom line. Ask yourself these questions:

- **Can you make it through another crisis like COVID-19?**
- **Do you have a reserve?**
- **Do you have the funding to keep programming going without having to cut anything?**

If the answer to these questions is "no," then now is the time to act. It's not that your organization should be overpriced. That places a burden on your members and is also unsustainable. But you also can't undersell and be underpriced because then you can't fulfill your mission in the most impactful way possible.

> *Heather Scott, AMR Management:* **"For membership, price hasn't gone up in a long time. For events, every few years."**

How correct pricing impacts your bottom line

To realize how dramatically pricing affects your bottom line, take a look at these two scenarios. For the sake of simplicity, let's say that in a $100 program, 70% of the price goes towards costs — admin, tech, events surrounding the program. We will use that as a baseline for both scenarios.

Scenario 1: **Offering a discount**

Your organization organizes a video conference for $100 and offers a 10% discount (a pretty average discount for many organizations). Most people would look at that discount and say, no big deal, right? We lose about $10 per person, so we need to get one more person for every ten that we sell to make the same amount of money, right? Wrong.

What you are doing is giving away 33% of your profit with no reduction in costs. That means that you need to increase enrollment by 50% just to break even. And it's optimistic to think that the amount of work needed would stay the same, given the 50% increase in enrollment, so costs may go up (and profit down). Giving a 10% discount right now means you're losing money on this program.

Scenario 2. **Implementing a modest price increase**

On the flip side, if we look at that from a price increase perspective, imagine you raise that $100 to $105. That's not a big difference — the price of a fancy coffee. If you were paying $100 for something that you felt was valuable, surely you would pay an extra five bucks for, it right?

But consider the impact: a 16% increase in your bottom-line profitability. In this scenario, if you were selling 100 seats, and you're making an extra $500, that's a small scale. But what about a $400 membership every year at 5,000 members?

The scenario you choose has the power to revive or kill your bottom line without much effort.

> *Tracy Vann, American Case Management Association:* **"Our association for 20 years has never raised the price of membership!!! Hopeful this webinar provides me the ammo to present to the Board."**

Four steps to changing your pricing strategy

Changing your pricing strategy — no matter the product or service — follows four steps.

Step 1. Data analysis

Data analysis looks at:

- **How members/sponsors are engaging with your products**
- **The value-to-effort ratio**
- **Segmentation**

Each of these data points can offer insight into what prices you can change. Ideally, you want to see which products and services offer high value to your members with little effort on your part. There might be some offerings that are high-effort, but if they are also high-value, that's a win.

Step 2. Market research

Market research uses focus groups and one-on-one interviews to determine what members need, what they want, and how valuable it is to them.

This step helps you determine which products/services can be discontinued, and which areas to ramp up.

Step 3. Market testing

This step looks at the following two questions to refine pricing and offerings:

- **Based on our market testing, will we see an increase in our profits, or a decline?**
- **Based on our market testing, can we provide more meaningful value to our members and our sponsors to best fulfill our mission?**

Depending on the answers, you may need to backtrack a bit and refine your strategy.

Step 4. Execute

This step is all about execution. Putting your new pricing strategy in place might not be quick - you might ease into it over a month (or more).

You also need prepare for change management, both internally and externally. Externally, you're communicating an exciting change that's coming because members asked for it. Internally, you're building enthusiasm in your organization because nothing kills an initiative faster than a staff that has not bought in.

Pricing strategies are living things — consider how you will evaluate the change and what you might need to refine as stakeholders adjust.

Easing into pricing strategy changes

If your association has traditionally offered a wide variety of products and services, the idea of changing all of your pricing all at once can be daunting. The good news is this: you don't have to change everything overnight.

Start by asking yourself if there is a pricing strategy in place, and look at the last time you changed your prices. Figure out where you are and what you've done in the past, and then pick one thing - a monthly webcast, a membership, an event, a small product - and then take it through the four steps. Do the data analysis, the market research, and the market testing, and then execute the pricing change.

See how it goes, and learn from it. You're going to get some things wrong, but guess what? You're also going to get a lot of things right.

Once you have this test pricing strategy under your belt, create an annual plan of how you're going to do this for all of your products. Commit to raising the price of everything every year. This doesn't mean that you're going to make a drastic value change to everything every year, but it does mean that you are going to strongly consider what that might look like. You'll create an annual plan, and then every two or three years all pricing will be adjusted.

Normalize implementing the four steps of your pricing strategy on a regular, predictable basis for the benefit of all of your stakeholders.

> *Michael Tatonetti:* **"I'm glad to see most are looking at value more consistently than price - if one has to go up, value really matters."**

> *Reta Adler, Association Headquarters:* **"Value always goes up and changes as we are very regulatory and legislative-focused, so our members find great value in the work we do for them so they don't have to hire someone else to do it for them."**

Section 3:

How the pandemic forced a reimagination of membership engagement

by Suzannah Kolbeck

Engaging with members is at the heart of association culture, and it's essential to discover new ways to engage with members, whether they're brand new or decades-long members. In a discussion at SURGE Forward, a panel of experts explored the topic from their unique perspectives as membership professionals.

> *Carolyn Mensching, American Society of Anesthesiologists:* **"I'm worried that use of digital engagement was temporary during the pandemic and not a permanent shift."**

Tiffany Kerns is the Vice President of Community Outreach for the Country Music Association. As she said, "I have the extreme opportunity and responsibility of making sure I am thinking about our 6,500 members who work in the country music genre, day in and day out. It's a job that I absolutely adore."

Temi Adewumi is a principal at TagB Consulting, where she works "primarily with small to medium-sized membership organizations to help them implement membership software and also CRMs. My goal is that the technology they use makes their jobs easier."

Eva Przygodzki formerly managed membership at American Fisheries Society, the world's oldest organization advancing the fisheries profession. Today, Przgodzki is the Chapter Engagement Manager at the Society for Fire Protection Engineers.

Elisa Pratt is the CEO and chief strategist for Brewer Pratt Solutions, a consulting firm "specializing in the delivery of transformative strategies that increase organizational success and project-based professional service solutions that enable non-profit organizations to evolve." Pratt said, "We're association nerds. This is what we do. We work exclusively with non-profit organizations." Pratt makes note that ideas should be "aspirational and actionable. None of it works if you can't put it into action."

Examine the Pandemic's Impact on Business

"I think we would be doing ourselves a disservice if we weren't talking about the impact that the pandemic has had on our business," said Kerns. "I'm interested in understanding how our membership organizations really started to shift during the pandemic."

Przygodzki cited meetings as something that dramatically changed amid the pandemic. With the inability to hold in-person gatherings, she says AFS was forced to pivot. "Our meetings are usually very well attended. I utilize the meetings to engage with early-career professionals." Przygodzki said, "When the pandemic hit, keeping in touch with this group became even more important, but on a different level."

She focused on small groups and small chats and continued reach out and engagement. "Keep the conversation going," said Przygodzki. She sought to involve early-career professionals in elections, too. "They have a direct impact on the direction that AFS will take."

> *Elisa Pratt:* **"After a year of virtual and now hybrid, the members have higher expectations then ever before."**

Help Members Connect with Each Other

Pratt noted how “engagement doesn’t just mean events.” She said that the revenue loss from in-person events has been significant, so people have had to learn other ways to engage.

“The more we see our members struggling and uncertain, the more we have to listen,” said Pratt.

Pratt wants to help members connect. To do this, she said, one must “harness the human element.” By putting appreciation into member segments, you can close the gap of human connection created by the pandemic.

“They want to meet each other. They want to build these relationships,” Pratt said of early-career professionals. “Engagement has taken on so many more forms,” she said.

This is a silver lining of the pandemic: Expansive engagement.

Understand the Need for Community & Community-Focused Tech

Adewumi said the pandemic for her underscored the need for community, “and the need to get technology to that community,” she said. “Since I work with small nonprofits, they’re very difficult to persuade to get new technology.” Due to smaller budgets, many small nonprofits are not eager to spend on a software upgrade. “But once the pandemic happened,” she said, “they needed a way to communicate with their members.”

The pandemic expedited the need for certain technologies that bring members and associations together. Technology purchases have increased during the pandemic, too. Adewumi noted this was a positive byproduct of the COVID-19 crisis. For smaller associations, they may tend to be risk-averse and thus reluctant to try new technology. But the pandemic put the need for tech into hyper-drive.

“People had to react. Their hands were forced,” Pratt said of the pandemic. “It’s exciting to see how far associations have evolved (during the pandemic). It’s given associations the tools and the platforms that they needed to be out there.”

> *Temi Adewumi:* **“We need to empower staff to make more changes!”**

How to Evolve Out of Necessity

“Everyone is getting more comfortable with being uncomfortable,” Kerns said. “The pandemic exposed a lot of blindspots for organizations and for humans.”

Kerns advised focusing on people, not products. Being fluid and flexible is important. “We have these humans who need resources and tools. How can we propel them, and help them be successful and thrive, even during a pandemic?”

Pratt talked about the importance of members’ wellness during the global pandemic, too. One organization she knows had members call each other as a “wellness check-in.” “It was simply to say: ‘Are you okay? How are you?’”

This type of check-in wouldn’t have come about had it not been for the pandemic. “Human engagement recognizes that vulnerability and uncertainty are the new normal,” said Pratt. She also noted it doesn’t have to be a high-tech affair. The check-in could simply be sending a postcard to members or a phone call.

Accelerate Engagement Potential

For AFS, the pandemic was a catalyst to invite early-career professionals to the table in a more substantive way, explained Przygodzki. “Being an old organization, we have to respect a lot of old traditions, and it was very difficult for early-career professionals to participate in discussion with the board and proposing anything new,” she said.

Due to these old traditions, some older organizations and societies may be resistant to changes, particularly when implementing new tech, such as Slack. Przygodzki said her younger members encouraged their society to use Slack as a means for helping members stay in touch. “Because of the pandemic, leadership agreed to that,” she said.

> *Claire Shanley:* **“We use a rule of two: If the same question comes up twice, then we relook at our instructions and take into account that need.”**

Choose Actionable Solutions

Engagement strategies are important, but even more so is implementing them and seeing them through to the end. Pratt is a huge proponent of ensuring the actionability of a plan.

“It kills me to see when a project is put on the shelf to collect dust, or no one took ownership of it,” she said.

She cited this as a common occurrence.

“Pick what you can really deliver on — you don’t have to do everything. You don’t have to do it all. Do fewer things better,” Pratt suggested.

Adewumi agreed, saying when she’s helping an organization incorporate new software, such as Slack, it may involve some extra adjustments made, particularly if the membership demographic is older.

“The organization said, ‘Let’s get Slack going, some people know how to use it.’” Some people were resistant to using it, though. “I think associations have started to be the movers in adopting technologies,” Adewumi said. Engagement is also about knowing what your membership’s technological abilities are, and the abilities of your staff and leadership. Adewumi emphasized how important it also is for software to be intuitive and easy to use in order to make it actionable and appealing to members.

Kerns recognized that setting up an organization’s success also means excellent communication and keeping everyone abreast of what’s going on.

“I think there is so much fear, but looking at the pandemic, I think we have the real opportunity to say: ‘I understand it’s uncomfortable, but it’s okay, we’ve got this,” she said. “We just got through a year of being really uncomfortable and having to pivot emotions and business strategies. You name it; we can get through it.”

> *Rob Gates, Bostrom:* **“I think of it as a controlled burn. Unless you occasionally remove underperforming and unvalued “trees,” your forest doesn’t have space for new growth.”**

Ask Members: “What Do You Want? What Do You Need”

Adewumi said that honing in on what members want and need is critically important.

As Pratt said, don’t “waste a crisis.” The pandemic is an opportunity to examine how associations can evolve and look for the new — and that comes from speaking with members.

Przygodzki’s organization put effort into engaging members during the pandemic and creating wider audiences for digital events. “I believe that, moving forward, we will never go back to what it was. We can only move forward,” she said.

At the CMA, Kern said, “We’ve evolved faster in crisis (during the pandemic) than we have in our 60 years of existence. That’s exciting,” she says.

Ultimately, the members are the heart of an association. Engaging with them in a meaningful way can ensure the longevity of an organization.

> *Tiffany Kerns:* **“Consistent analysis and assessment is necessary of all strategies that support goals - it SHOULD help orgs properly prioritize.”**

Section 4:

How the OKR model helps association teams stay aligned, focused, and productive

By Emily Herrington

It's a natural occurrence: in an annual meeting, the board of directors sets ambitious, big-picture goals for what their association should accomplish in the next year.

The meeting wraps, and everyone goes back to their day-to-day.

When it's time to review those goals the next year, they haven't been ushered forward, and the cycle repeats.

So how can we break this pattern and ensure goals aren't just lofty but are actionable? How can we measure progress and success? What can we do to align the implementers and the strategists?

Debra BenAvram, CEO of AABB, and Alex Bartholomaus, president and CEO of People Stretch Solutions, advocate for using the OKR framework to accelerate progress and value.

What is OKR?

OKR is a goal-setting framework that helps create and align team goals. Using this structured goal framework, organizations are able to translate their strategic plans into commitments that align teams and drive execution. The purpose of OKRs is to push leaders out of their comfort zones and to clearly articulate what needs to be accomplished every quarter.

OKRs consist of Objectives and Key Results.

Objectives are significant, concrete, and inspirational goals. Objectives should be ambitious yet realistic, Bartholomaus said.

Key results, on the other hand, are specific, time-bound and measurable. These are the outcomes that quantify how close you are to accomplishing the objective.

> *Debra BenAvram:* "I do not share OKRs with volunteers and members. We want staff to aim for moonshots -- really push themselves — so we have to create a safe space for that."

How OKR works

BenAvram and Bartholomaus recommend setting OKRs on a quarterly basis. Leadership teams should set top-level objectives that are then cascaded down to the front lines.

Strategic planning should happen in the first two weeks of the quarter. After that, the focus shifts to execution for weeks 3-12. OKRs should be discussed in team meetings and one-to-ones to consistently reiterate the goals and measure progress made toward achieving them.

“By driving focus in those two places, all of a sudden, organizations and associations can start getting momentum and velocity on their biggest priorities,” Bartholomaus said.

The final week of the quarter, week 13, is the retrospective. This is when the whole team looks back on the past quarter to celebrate their accomplishments and learn from what didn’t go right.

Setting objectives and key results

Each quarter, there should be 4-5 objectives set by the executive team that answer what you want to accomplish and why it’s important. These should be exciting and ambitious, and it’s important to remember that an objective is not the same as a project, like launching a new content series for the knowledge library. An objective is something bolder, like “Amplify the organization’s leadership in the field.”

BenAvram recommended not to create objectives along product lines — instead, they should tug at the why and usher in cross-departmental collaboration.

Every objective should be accompanied by 2-3 key results. Because key results should always be quantifiable, it can be difficult to know what number to choose as your KR. But BenAvram said not to worry — your first go at writing KRs is your baseline. From there, you will get continuously better at knowing what to measure. Perfection is not the goal when getting started with OKRs.

“Put a number, decide whether or not you can live with that number, and then shoot for the stars and see what happens” she said.

> *Alex Bartholomaus:* **“OKRs tries to force you to be intentional about where to focus and at times make trade-offs so hopefully you can focus on less. For a small team, it is a little harder since people wear multiple hats, but every leader and team has a threshold.”**

OKR disrupts common patterns association teams fall into

When the board sets big goals on a quarterly or annual basis, it's easy to get overwhelmed by the breadth of the goals, or worse, to fail to communicate these goals down to the frontlines who are responsible for executing on the tactical work that clocks progress towards those goals. Sometimes, it's hard for an individual staffer to understand the role they play in advancing these goals.

"We have to value the strategy work and the tactical work. Without that, the strategy won't happen," Bartholomaus said.

Here are a few ways OKRs help organization leaders overcome strategy execution challenges.

Intimidatingly broad strategies: By breaking big-picture strategic plans into bite-size chunks, objectives become attainable and easy to see how the needle is moving in the right direction.

Not knowing who is responsible for what: The OKR model is built on transparency and accountability, so it cuts out the lack of clarity that can come from not knowing who is responsible. "If everyone is accountable, no one is accountable," BenAvram said. With OKRs, it's easy to see how an individual's work is interwoven with their colleagues.

Lack of buy-in from implementation teams: The conversations that OKR facilitates show individual staff members how they have a direct impact on major organizational goals and objectives. They can see how their work impacts the big picture, which is essential for driving engagement and motivation.

Competing priorities: OKRs help drive focus and inspiration and highlight the work that really matters.

"If association leaders want accountability, they first have to get alignment," Bartholomaus said.

Motivate your team with OKR

OKR lets you celebrate wins as an organization together, on a more regular basis. When everyone has a clear role in helping achieve a top-level goal, it's a lot easier to get motivated and feel connected.

Teams have more engagement, accountability, clarity, and ownership when they adopt OKR. Investing more time and getting more people involved pays quarterly dividends.

"You have to be very thoughtful about how you're engaging in your team meetings and reviewing performance versus one-on-ones," Bartholomaus said. "An OKR gives you a more structured way to do that in order to inspire great performances and help your team live their mission."

Section 5:

How video can be a gamechanger for associations

By Emily Herrington

Is your association using video in your communications with members and prospective members? SURGE keynote speaker Marcus Sheridan said this often-missed opportunity is an effective way to build trust, strengthen relationships and differentiate your association from the rest.

Why should associations produce video content?

Sheridan, an entrepreneur, sales and marketing expert, and author, said a trend that has rapidly changed is the zero moment of truth. Because of the internet, consumers now have access to infinite information, so the buying cycle looks a little different than it did in the past. Sheridan said prospects are now 70% of the way through the buying cycle before reaching out to engage. Video, he argued, can help prospective members and event goers get through that 70%.

Video is critical to adopt because it is the most frequently consumed online content format. In fact, Sheridan said 85% of all content consumed online will be video-based by the end of 2021. Additionally, video shared on social media generates 1200% more shares than text and image content combined.

“As a whole, the association space has been very slow to embrace video the way we could or should,” Sheridan said. “... If it’s not a part of who we are within the association always, all the time, then there’s a good chance we’re being left behind.”

If you’re wondering where to get started, Sheridan said all associations should create these seven video types:

1. **The 80% video**
2. **Bio videos**
3. **Service and product page videos**
4. **Landing page videos**
5. **Pricing and cost videos**
6. **The hero’s journey video**
7. **The claims we make video**

In the next section, we’ll dive into what goes into creating each of these video types.

Marcus Sheridan: **“Ideally, video IS personal, especially if it’s 1-1 video.”**

7 types of video every association should have to grow and impact members

1. The 80% video

Sheridan posited that most associations hear the same questions over and over from prospective members. In order to not only work more efficiently, but to further establish trust and build relationships, Sheridan recommends creating a video that answers 7-10 of the questions associations hear most frequently. By creating a video like this, prospective members are better informed and more likely to convert.

“If you keep getting asked the same questions, whose fault is it?” Sheridan asked. “It’s our fault as the association because we didn’t address the thing. It’s our job to make sure they’re informed — the leads we get are as good or as bad as the information that got them there.”

2. Bio videos

Creating a custom video talking about your professional and personal life, and why you love your field, builds a human connection that text cannot. Sheridan said creating bio videos will make your association feel different from others in your space. He recommends embedding the video into your email signature using a service like Wise Stamp. This helps break down barriers, feel more humanizing, and create a more communal feeling.

3. Service and product page videos

Every service or product page of your website should have a dedicated video discussing what it is, who it’s for, and who it’s not for, Sheridan said. “The moment we say what we’re not is the moment we become dramatically attractive to those who we are a good fit for — so do this. Talk about it.” Sheridan said this disqualifying should be done at both the individual product or service level, as well as the association level.

“If you’re a good fit for everyone, you probably wouldn’t be a great association,” he said. “There’s got to be distinctive elements that make you great and attractive to the marketplace.”

4. Landing page videos

Everywhere on your website that hosts a form to fill out should be accompanied by a video, Sheridan said. The video should be titled “See what will happen if you fill out this form” and describe exactly what happens if they share their information through the contact form, like what the next steps are and how their information will be used. Sheridan said landing page videos can increase conversions by an average of 80% because they directly address leads’ fears and concerns.

5. Pricing and cost

Prospective members need to be educated on the value associations provide in order to understand pricing. In a pricing and cost video, associations should discuss not only what their fees are, but why they are what they are. This helps prospective members understand what makes some association memberships more valuable than others.

6. Hero's journey

To help prospective members emotionally resonate with the solutions you provide, Sheridan recommends creating a hero/member's journey video. The video should position one of your members as the hero, with your association as the guide helping the hero succeed. To do this, record a video of one of your members talking about:

- **Where they were before they were a part of your community and the problems they were encountering**
- **What led them to your association and why they joined**
- **The journey they've gone on with you**
- **What they've gotten out of their membership over the years**
- **Where they are today because they decided to join**

Sheridan said this video type is significantly more effective than testimonials and reviews because it allows potential members to see themselves in the video.

7. The claims we make

Sheridan urged association leaders to take stock of every claim they make (e.g., "the best professional organization in XYZ industry"). Because many competing organizations' claims are likely similar, Sheridan recommends creating a video justifying and proving those claims. Potential members can watch the video to see for themselves how your claims are verified.

> *John Ogle, NACCU:* **"All these practical takeaways are awesome! We need more of that."**

Give your emails new life with video

In addition to strategically placing the seven core video types throughout your association's website, consider bringing the power of video into your emails as well.

Sheridan said video can help associations overcome the most common pitfalls of text-based emails, like low open and response rates. To ensure the message comes across more clearly and is more engaging, he recommends recording a custom video with a tool like Vidyard to answer leads' questions and follow up in a personalized way instead of sending a traditional and boring "just checking in" message.

"This is something we all should be doing, especially because associations are so community- and relationship-based dependent in terms of their success," Sheridan said.

Creating a single video made for one individual person not only helps improve open and response rates, but it helps your association stand out by making leads feel like they know you already.

For association leaders and staff members who are camera shy or don't believe video is for them, Sheridan said to not look at the camera as a camera, but rather as a member you're meeting in a coffee shop. But at the end of the day, he said, our opinion of whether we believe if we're good on camera or not is irrelevant — regardless of what we think, the marketplace's opinions matter more, and video is what they're looking for.

The key is to make prospective members feel like they know you before they've ever met you.

"This is about how can you become that voice of trust. Video is one such way, and it's an amazing way. It's not going anywhere, and it's only going to grow. So let's embrace it, and let's lean into it. If you do, it's going to make an unbelievable difference."

Section 6:

How to use data visualization to find communities within your association

By Suzannah Kolbeck

It’s no secret that we are a visual society. Our eyes are drawn to graphics and visualizations that help us make meaning of a variety of complex situations. We might like to think we are able to quickly grasp, process, and utilize vast sets of data, but in the end, we all really appreciate an eye-catching image to help us make meaning out of random-seeming groups of information. Enter data visualization.

What is data visualization?

Like the millions of people in business and online, your association is gathering massive amounts of data every day (even if you don't realize it!). Data visualization is a tool that takes that raw data and transforms it into a useful tool to help you better serve your members.

How?

- **Data visualization is immediately engaging and captures attention**
- **Imagination is piqued and connections are made**
- **Visual representations allow leaders to interrogate the data in a way that leads to actionable outcomes**

Each of these outcomes brings you closer to your organization's mission and helps you measure your progress against goals you have set.

Different types of data visualization

Data visualizations can be presented in a variety of forms, including:

- Charts
- Graphs
- Infographics
- Tables
- Maps
- Dashboards

How does data transform communities?

Which type of data visualization you use is less important than how you utilize it, and for what purpose.

John Foreman, CTO of Mailchimp, offers a clear example of a type of data visualization called a network graph that can be very useful for community building. He uses a list of characters who have been linked with each other on the TV sitcom Friends to determine who is most romantically active. Each connection they make is represented by a dot, and each dot is then linked to indicate how romantically connected each character is.

Similarly, a network graph helps you start thinking more clearly about the different communities within your organization.

Consider CareSet, the first organization in the U.S. with open access to data from Medicare doctors and their patients. This network takes publicly-available Medicare data and creates a network graph based on doctors in the Medicare network. This network graph clearly represents the following:

- **Which doctors are referring patients to other doctors**
- **What procedures are being recommended**
- **Key doctors within a specialty**

Doctors can use this data to broaden their networks and to see areas in which they might expand their referrals. This network graph also groups patients by disease and follows their outcomes, tracking which doctors prescribe care for best outcomes. This is a clear case for data-driven decision-making that can literally have a life-or-death outcome.

> *Thomas Altman:* **"The goal of this analysis is to keep the complexity very low."**

Data-driven community detection in your association

But how does data-driven community detection work when lives aren't at stake? It highlights connections and related outcomes in a clear visual.

The process of transforming raw data into an actionable visualization can be very intimidating, but most associations can come up with a good visual in less than an hour.

There are three things to keep in mind when creating a data visualization to detect community behaviors.

1. Know what you're looking for

Why are you diving into data-driven community building? Is there a specific issue you'd like to address, or are you simply trying to get a better idea of what your association members want?

2. Choose the right visualization

If you are looking for different sectors and communities in your association so that you can better tailor your products and offerings, which type of chart, graph, or plot might show that data to its best advantage?

A network graph easily demonstrates how your members are connected. Pie charts and bar graphs compare their engagement. Histograms show behavior over time.

You get the idea — match the visualization to the data for best results.

3. Mind your design

You want your representation to be clear and striking, not muddy and confusing. Use colors that clearly contrast each other to avoid confusion, and keep your design simple.

> *Thomas Altman:* **"There are other tools for this. You can do a lot of this with some of the BI tools like PowerBI and Tableau. For the more technically inclided, there are libraries in Python and R that allow you to script a lot of this."**

Bottom line? It's all about community

Data visualizations offer valuable insights that we might otherwise miss. Your organization can use these charts and graphs to understand - based on people's behavior - what their motivating factors are and what interests they might share with others in the association or community. Each of these people might not know each other individually, but knowing how they behave helps better understand them as a group or a community of people with similar interests and needs.

When you understand the specific value each group of is getting from their interactions with your organization, you can continue to advance your mission. This might mean beefing up outreach that matches the motivating factors within a group, or it might lead to new products or services tailored to each individual in one of those data sets.

Data visualization is here to stay, and it's a tool you can use to develop community, further your mission, and add value to your members' lives.

Section 7:

Empowering diversity is more than just checking boxes

By Emily Herrington

Your association or organization might have all the right policies in place. You comply with equal employment opportunity measures, you have multiple demographics represented in your staff, and you have discrimination policies that promote a fair work environment.

Theoretically, you're checking all the right boxes to make your association membership and staff a diverse and inclusive community.

But are you actually **empowering** your diverse teams to thrive?

Expert panelists at SURGE said that to be truly diverse, equitable, and inclusive, associations need to dig deeper and be prepared for some uncomfortable conversations. Diversity should be at the heart of the entire organization — not just in HR compliance.

Here's what leaders can do to not only practice diversity, but to empower it.

> *Barry Barresi:* **"Empowering diversity and inclusive excellence is EVERYONE's job."**

What does it mean to empower diversity?

Empowering diversity is about more than compliance and even representation and recruiting. Associations not only need to have diverse voices as part of the conversation, but they also need to create environments that are open, trusting, and empathetic so that community members, staff, and other stakeholders are free to bring their authentic selves to the table.

"At its core, diversity represents the most valuable resource we have on this planet," said panelist Christopher Urena, chief learning officer of the Endocrine Society. "… It's an inimitable brain trust, an unparalleled think tank. When you bring together the minds of people from all walks of life who represent various racial and ethnic backgrounds, cultures, religions, experiences, perspectives, and ideas, the opportunities are unbounded."

Panelist Sheryl McCalla, vice president of strategic initiatives at the American College of Rheumatology, highlighted that when speaking about diversity in the context of associations, it applies to the staff, board members, volunteer leadership, and membership itself. Additionally, diversity refers to both demographic and cognitive diversity, welcoming and empowering not only individuals who look different and come from different backgrounds, but also those with different perspectives, viewpoints, and methods of processing information.

> *Ralph McClish, American Osteopathic Colleges of Ophthalmology and Otolaryngology:* **"What I have found is not only giving a voice at the table but sharing power as well. A voice will not be heard if it does not carry a stick with it."**

Diversity leads to excellence

Panelists agreed that associations won't be able to reach their greatest capacity of excellence without diversity.

"Within every demographic category, there are people who are talented and excellent and creative and motivated. Then the question becomes, why wouldn't there be diversity? If there's this excellence everywhere, then you should naturally see diversity. It's a matter of equity if we're not seeing diversity," McCalla said.

How can potential be maximized and excellence unlocked if there aren't individuals present at the table who think and process information differently? Homogenous groups simply don't have the same spectrum of experiences and perspectives to achieve meaningful excellence.

However, to achieve excellence, those diverse talents need to have all of the available resources.

"It's one thing to have people welcomed to the table, but I don't think that's enough," Urena said. "As leaders, it's up to us to support these talented colleagues so that they thrive not only in this organization but also future workplaces and volunteer roles."

Associations need to be role models in ushering forward best practices

Panelist Marcia Howard, vice president of regulatory affairs for CHPA, urged association leaders to think bigger. "In the association community, we all have the ability to have significant impact on our members, as well as society as a whole."

It's important to remember that associations have a much broader impact than just their members. Associations are looked to to identify best practices within the entire industry and beyond. Therefore, they have a responsibility to set an example for society at large. Likewise, even though it may be uncomfortable, associations should stop being afraid of discussing social justice issues that affect our lives. DEI initiatives are too important to gloss over or neglect.

Additionally, panelists said that associations need to be involved in issues of social impact. Members want to know how the organization as a whole plans to address the social issues of today.

> *Carolyn Aeby, InterAction:* **"Allies are critical, it is an organization effort and it starts at the top with the CEO setting the commitment."**

Building trust and creating open environments

Howard said her association implemented fireside chats, where every few months, the staff comes together for transparent conversations about their life experiences and upbringing. Through these chats, Howard said her team has forged stronger bonds and deeper, richer connections among colleagues.

“It costs nothing to the staff but their time,” she said.

By building trust, you can create an open environment that empowers teams to feel secure in being their authentic selves and bring forward new ideas, thoughts, and experiences. However, a side effect of this is a little discomfort.

Discomfort is an essential part of growth — after all, how can you not expect differing opinions when you’ve built a cognitively diverse team with people from all different backgrounds?

Panel leader Dr. Barry Barresi, president and CEO of Association Ventures, said team abrasion can be safely managed and tapped to reach highly creative and innovative solutions.

The key is to not be afraid to face these uncomfortable conversations and to not view conflict as a negative outcome. “You don’t get innovation without diversity and conflict,” Howard said. Leaning into potential conflicts will generate the best ideas, she said.

Urena said the best way to approach these fireside chat or town hall situations is to set ground rules from the start. He recommended telling all participants to expect some uncomfortable moments. But this leads to real, authentic conversations that open minds to other points of view.

These kinds of conversations should be hard-wired into the culture of the organization, Barresi said. It’s much more natural to empower a colleague with whom you already share a connection. But again, the key here is to have established trust at the forefront. Without trust, you will miss out on the creative ideas that diverse thinking ushers forth.

“This is something that’s so simple to do. Instead of starting a conversation with your staff member with the business at hand, simply ask how he or she is doing, or ask about their lives. That creates an opening before you jump into the real purpose at hand. And if we do it authentically, they will understand that their leadership cares, and they will reciprocate in their energy and efforts towards the organization,” Howard said.

> *Richard Yep, American Counseling Association:* **“CEOs need to make sure they are not just “checking the box” because they are supposed to do this. They need to question themselves and be open to conversation that may not always align with where they are.”**

Key takeaways for empowering diversity

In summary, these are some important takeaways to keep in mind when empowering diverse teams:

- **Diversity and excellence are closely intertwined — you don't have to choose between diversity and excellence, and you can't truly achieve excellence without diversity.**
- **Ask tough questions and be ready to answer honestly, such as "do we really believe in diversity?"**
- **Understand that empowering diversity is a skill that needs to be learned, just like management.**
- **Celebrate achievements: "There's nothing like making a positive impact on social good that really energizes an organization," Barresi said.**
- **Take diversity further than programmatic compliance and create an open, trusting environment in which all involved feel confident and safe to speak their minds.**

Empowering diversity in a meaningful way takes time, learning, and intentionality. It's a long-term process that requires effort every day, but it's a practice associations cannot afford to neglect.

> *Juan Amador, Association of American Medical Colleges:* **"Trust is important for psychological safety in organizations. You have to trust and feel safe to share."**

Section 8:

Governance post-pandemic

By Pete Croatto

The shift to an online work environment over the past year has provided an opportunity to not only improve associations' governance, but to better prepare for the future.

Michele Lui Lord, executive director of the Financial Management Association International; Sudip Parikh, CEO of the American Association for the Advancement of Science; and Richard Yep, CEO of the American Counseling Association, explored how to achieve this balance during "Pathways of Governance in a Post-Pandemic World" at SURGE Forward.

"There were large gaps when governance didn't take place at all, or governance meetings didn't take place at all," Parikh said. "What the pandemic has brought is because of the use of the technology, it's just a much more continuous flow of communication. That's been really positive." One of the benefits, he said, was "the executive committee, I definitely think, gelled more during this period, just because they wanted to understand potential impacts and they wanted to understand our framework for decision making."

> *Richard Yep:* **"The pandemic served as an accelerator in how boards need to adapt to working in a more technologically way FOR the benefit of the association and members who will be active into the middle of this century."**

The board of trustees at the Financial Management Association International consists of past presidents. That experience proved invaluable in the pandemic's early uncertain months, Lord said.

"When this pandemic happened, I said, 'Your goal is to use your historical perspective to help us navigate all of these risks and understand how we're going to sustain ourselves and thrive in the future." The reminder, Lord added, allowed the board of trustees at the Financial Management Association International to "re-center on the goal of the group, which I thought was great."

Who will govern the association in the future also became an important consideration as associations tried to find their footing in a pandemic that featured social justice protests.

"We have a fairly strong multicultural diversity lens that we look at everything through," Yep said. "And I think I've seen more of the board members say, 'How do we enhance the pipeline of those who are aspiring to leadership? And how do we get people who may not be the traditional people who are serving?'"

Answering that question became a big priority for the American Association for the Advancement of Science, which was founded in 1848, a time when diversity wasn't even an embryonic concept. Now, its entire leadership line consists entirely of women; 40 percent of the board consists of underrepresented minorities. Parikh admits the first president "never imagined that the CEO would look like me." An update was required.

Parikh said an "evolution and revolution" has occurred in scientific fields. "What this time has allowed us is the opportunity to have the governance catch up with the facts on the ground," he explained. "And so our governance, the last time it was updated was 1953." The past year provided an opportunity "to rethink and get set for the next 75 years, in terms of our governance documents, because we want it to reflect the facts on the ground."

> *Danielle Duran Baron, School Nutrition Association:* **"***"Who do you know?"* **is such a good question, but sometimes, as staff, we need to nudge our own volunteer leaders that they need to look outside their own networks."**

Yep and Parikh said getting board members with different kinds of experience matters, too.

Parikh explained that scientists typically do their best work before age 35. “If you look at our governance, we’re hard pressed to find anybody under 35,” he said. “And so how do we build that into the process? How do we get that voice to the table? Because I think we’re fooling ourselves if we think that we’re not missing something really, really important.”

Fewer members on a board might also help. Lord said the unwieldy size of boards comes from adding members for various needs without “thinking about the association as a whole.” Parikh said “a smaller, but more substantive, group of folks who are working in the governance table” could provide more staff resources for “the exciting work that the members and the staff wants to do.”

That work, Yep advised, needs to be simplified. “I’d like to see one piece of paper handed out to the board and just three questions,” he mused. “It would be, what’s the state of the profession? What are world events right now? And how do the actions of our organization help shape those events to align with our mission? Then that’s all I want them to talk about.”

Every board, Lord said, needs someone “to provide the stability and allow this association to make its decision based on the mission of the organization and to move forward.” Don’t be surprised if a member of an association’s young wave fills that role.

“We have a generational change that is happening,” Parikh said. “And it’s not going to happen in incremental steps. It’s going to happen like a phase change, like water to ice. And our governance has to be prepared for that, because I can tell you that the scientists that are leading the way in the junior levels right now, they do things just completely differently than the scientists who grew up in my cohort. We’ve got to be ready for that as an organization.”

> *Lowell Aplebaum:* **“non-member board appointees are just one means - and a potentially good one - for building greater voice and awareness of what Board members should consider outside of their own experience and perspective.”**

Section 9:

Leading through the pandemic: a new ceo playbook

By Suzannah Kolbeck

The last 15 months have been a time of evolution and constant change that look to be with us for a long time. It's not the first time a CEO has had to revise their playbook, and it provides the perfect opportunity to design more effective ways of doing business moving forward.

> *James Wilkinson, Anacostia Trails Heritage Area:* **"I love the common theme of displaying our humanity and vulnerability to our staffs, in order to touch theirs. Leading with our hearts, by showing our hearts."**

What's changed in leadership — and what's the same

Our humanity has come through in so many ways — did you ever imagine you'd be working full-time at home with kids running in and out, the dog barking, and the doorbell ringing as you try to meet the complex needs of all of the stakeholders you serve?

This has become part of real life that we're sharing with our leaders, our members and our staff. It's a new look for many leaders, but the mission-driven focus is a constant. How do CEOs stay focused on the mission of the organization when the physical space and the demands on their time have shifted?

Understanding that we're all in this together and be compassionate

The first thing to recognize is that everyone has been experiencing these profound shifts in the last 15 months. It's crucial to act from compassion for your employees and members.

With time, this compassion will extend to yourself and what you are struggling with, too. Building up the well means realizing it's okay to feel terrible sometimes because no one knows 100% what they are doing right now. This helps you to stay grounded and to reset.

This self-compassion also prevents you from acting out of insecurity or fear of failure. Take your years of experience and act from a place of confidence and security, depth of knowledge, and heart. We're all in this together.

Share more about yourself as a CEO

Along the same lines, it's crucial to share the details of your life — don't hide the chaos. It can be challenging, especially if you are generally a more reserved person who prides themselves on keeping work and home life separate.

But letting employees and members peer behind the veil is a great way to rebuild your association's culture as you come back to work (whatever that might look like!). All of your relationships will need to be renegotiated, and this is a good first step.

> *Rob Gates, Bostrom:* **"That willingness to try new things/take risks that so many of us saw during the pandemic is something we all need to carry forward into the new normal."**

Cultivate flexibility

Flexibility is going to be the key as we slowly begin to re-emerge from the incredible challenges of the past 15 months. If this time has shown us anything, it's that everyone doesn't work the same way. There may be someone who wants to be in the office full-time; others are more interested in fully remote work (or a hybrid approach).

Flexibility considers not what employees are individually looking for but also how to support our teams for success.

Provide employees (and members) tools and resources

Part of the flexibility above is making sure we provide employees with the tools and resources they need to do their jobs. Chances are good that your office is made up of different demographics in terms of work experience and age. Different people will require different tools based on these factors, and it's your job to remove any obstacles that prevent your employees from feeling successful and competent in their work.

The same thing is true for your membership. When we adapt offerings and pivot, it's crucial to understand that our members are also at different stages — they have different learning curves and comfort levels with technology versus more traditional methods.

By providing appropriate tools and resources for members, you'll see a high level of engagement from people who were uncertain at first but become enthusiastic once they realize that the tools you have provided them really work.

Get practical and document procedures

If your company has never before had any kind of remote policies, plans, or procedures, documenting them as they are implemented is critical. This might be something as simple using your meeting platform to do a screen share, record the process being taught, and store it in an easily-accessed folder for reference.

Be creative in culture building

Some of the virtual networking technologies might not be perfect imitations of real life, but you don't need perfection. As we begin to come back together, it's crucial to help employees and members re-build a new culture in creative ways.

This might mean offering a variety of options — a mix of virtual and small, in-person events if possible. Making progress forward is the goal even if everything doesn't work for everyone.

> *Anne E. Grove:* **"You have to be very intentional in helping maintain and build (culture) remotely."**

On the agenda for CEOs

For all of the struggles in the past 15 months, we have seen some incredible innovations and creativity. How do you keep what's working and bring it forward?

Make decisions based on clarity, not reaction

There was a lot of reactivity when our offices headed remote, but we can leave that behind. Seek clarity in decision making moving forward. This might mean changing ways of doing in the past - a big blowout annual meeting, for example - in favor of better, more effective offerings moving forward (a virtual conference with some in-person events).

Resources exist to help CEOs maintain clarity as we make decisions instead of simply reacting to the challenges that will surely continue.

Stay disciplined - and innovate

Choosing how we work as the world opens up is a matter of being disciplined and continuing to innovate. If your employees prefer virtual meetings and working remotely, push that forward. Invest time and attention and commit to working with what's working.

Virtual tools also provide the opportunity to bring many of your members together. This is what drives value for associations, and it's what we want to capitalize on. The practicality of virtual networking being more affordable and accessible is going to give it momentum on its own, but it requires discipline to stay consistent and innovation to stay engaging.

Address social justice

Issues of social justice were centered in 2020, and this has created challenges for CEOs across industries. While it is easier for some organizations to take a stand than others, inaction is not an option as we push to the next level.

One way to work towards social justice is to look at training and education, the offerings of the association, and the process for electing board members. Although multiple views can exist in the same associations, politics and work are merging, and we need to be responsive.

> *Virginia Petranacosta:* **"Trying to focus on meeting team members where they are is very different than having the same return to work policy for everyone. Flexibility is key, and the results will not be the same for everyone."**

Top three challenges ahead

Being a CEO has changed dramatically in the past 15 months. Much of what you are called to do doesn't appear on a traditional position profile or job description.

So what are the three leadership skills most important for CEOs post-pandemic?

Cultivating an entrepreneurial mindset and resourcefulness

There are more pivots coming. It's time to let go of traditional orthodoxies. Let's embrace and adapt new approaches and take calculated risks.

Gaining clarity and building agency

Tap into the pool of resources of colleagues and their experiences in the industry. Use these understandings to take risks and make decisions from a place of clarity.

In this same vein, it's time to empower people to understand how they can be better employees through mentorship and teaching. This decentralization gives everyone the tools they need to cultivate agency when we are not all in the same room.

Leading from within

Leading from within means that it's time to focus on authentic leadership that honors not only who you are as a person and a CEO but also who you serve in terms of the employees and the members. The core values that lead you to your work are the same ones that will help lift you up when more challenges arise. Lean into that authenticity, and lead from there.

> *Cynthia Simpson, National Society for Histotechnology:*
> **"Understanding the importance in having compassion for yourself and others is one positive that has come out of last year."**

Section 10:

Leadership and resiliency

By Pete Croatto

Finding clarity in the chaos: Lessons from the frontlines of leadership during a pandemic

As Mike Moss, president of the Society for College and University Planning, Donté Shannon, CEO of the Association for Equipment Management Professionals, and Sarah Trahern, CEO of the Country Music Association, and Sarah Trahern, CEO of the Country Music Association, all discovered as they spoke together for the first the time at “Key Lessons from the Path to Resilient Leadership” during SURGE Forward, there’s a way to find clarity in a crisis.

“We have an opportunity now to really become greater good-based organizations, regardless of mission,” Moss said. “That’s kind of why we all showed up in the first place. And with that resiliency of leadership and fortitude and persistence — putting all those into the attributes of board members — doesn’t mean that we’re starting to configure different ways to disagree. We’re actually configuring different ways to lead, and I do think we’ll start to see much more collaboration and a lot less competition.”

That extends to board members, Shannon said, who must become “comfortable being uncomfortable.”

“You’ve got to be comfortable with flexibility and having multiple scenarios and not knowing what the actual outcome might be because of environmental things that might happen or impact what you want to happen,” he added. “We’ve got to find people again who are resilient, (to whom) crisis is not something that devastates them — crisis is something that they look at as opportunity.”

Associations were no different. For Moss, the coronavirus meant accelerating the association’s strategic plan while Shannon used the pause in daily working life to refocus his association on advocacy.

“A lot of our partners had these powerhouse government relations departments, and they were starting to come together to lobby Congress on not shutting down our industry, not putting other restrictions on our industry,” Shannon explained. “And I said, ‘This is an opportunity for us to jump in here, right?’ Because, when this is all said and done, this is something that we don’t want our members to look back and say, ‘Well, what did you all do?’”

The Country Music Association, which relies on big events for revenue, shifted its efforts to industry support.

“We put in place mental health resources, food resources, job bank resources for our industry,” Trahern said. “Our partnership team didn’t have anything to sell. So we repurposed their jobs (and redirected them toward) researching job opportunities” for members.

Associations are only as good as the mental health of their members and employees, so one of Shannon’s main goals was figuring out how to keep his members — who rely on being out in the world — engaged.

“How do we keep them understanding that they still have a professional home here, this is still a place that they can find value in education and training and things like that,” Shannon said.

Moss also stressed self-care for staff: “We worked in a series of wellness days that were mandatory,” he explained. “It was a paid day off and you didn’t get a vote — you had to go attend to your family.”

> *Linda Lambert, Physicians for Patient Protection:* **“To me, resiliency is being aware of the past, recognizing and openly discussing current challenges and opportunities, taking care of self/staff/members, and being honest about abilities to do things as they were or needing to change based on circumstances.”**

"That ongoing resiliency of our members to have to make changes to serve their constituency, helped us accelerate our ability to service through our accelerated plan, our constituency, and stakeholders," Moss said. "So I think that's been one of the best opportunities is to also see the wellness aspects that needed to happen."

The panelists also learned to embrace scenario planning.

"It's created a transformative level of planning that we weren't able to do," Trahern said. "We were able to do it, but we didn't need to do it. And now the ease with which we can go through things is so much faster because of that."

"Scenario planning is not a crisis-only mechanism and tool," Moss added. "Also, as a matter of practice, it really opens up opportunities."

That is now part of an "innovation hub," and it's been fruitful for Moss and his colleagues. So far in 2021, "we've launched two products because of the incubator," he said. "And so it was the scenario planning — that we really just absolutely stand on as a discipline for our clientele — served us in an innovative capacity that I don't think we could have planned for. So it's been a great lesson from that perspective."

Another invaluable lesson: board members learning that leadership can mean letting someone else take over — especially in a troubled time.

"One of the things I think was great with my board is they really came together to say, 'Look, we don't know how to do this," Shannon said. "'We're going to look to you to really help lead us through this and tell us what we need to be doing.'"

"If we can energize our organizations based on teamwork, collaboration, surprised leadership — people who came out of this with different skill-sets — our association worlds are going to be so much stronger to be able to do business and thrive," Trahern said.

> *Amanda Darnley, American Association for Marriage and Family Therapy:* **"We really transitioned fairly seamlessly and ended up offering our pivoted virtual conference for free to all members. Our satisfaction rates and renewal rates were extremely high after that. And I think that assisted in our ability to work with the Board and membership to research our office options and make some great cost-saving shifts that will be game changers moving forward."**

Section 11:

Diverse leaders are key to associations' success

By Anne McCarthy

When we think of any organization, its leaders are often top of mind. Hear "Apple" and you think of the late Steve Jobs. Someone mentions "OWN" and you're going to think of Oprah Winfrey. It's hard to separate the leader from the thing they lead, which can be to both the detriment and the benefit of an organization.

What does strong leadership look like, exactly? What kind of leaders do associations need to ensure their success?

During a SURGE Forward panel discussion entitled, "¡Adelante! It's Time for More Hispanic, Latino, and LatinX Association Leaders," Latino leaders offered ideas about what good leadership looks like — and how to increase diversity within an association.

Danielle Duran Baron, Staff Vice President for Marketing Communications at the School Nutrition Association, moderated the discussion. A native of Brazil whose first language is Portuguese, Baron said, “This panel was put together to highlight the inclusion in the Latino community. We are diverse by design.”

Celia T. Besore, the Executive Director of The Monitoring Association, was born in Puerto Rico. Her mother is from Spain, “so I share some of the immigrant story about coming here to succeed,” she says.

Juan Amador is the Constituent Director for American Medical Colleges (AAMC). Amador was born in Honduras and said people often tell him, “You don’t look Hispanic,” to which he says he is Honduran. “I’m proud of my heritage,” Amador said.

At the time of filming, Justin Reyes was the Director of Business Development for the Associated Builders and Contractors Association in Kansas City. He shared with a smile that he doesn’t speak Spanish but is of Latin heritage.

“We have all heard that the future of this country is Latino,” Baron said. “There is plenty of research out there. … (It’s reported) that by 2050, 50 percent of the workforce in this country will be Latino.”

Leadership Qualities: Resilience & Tenacity

Besore believes resilience and tenacity are the keys to good leadership.

“Leaders have to be resilient and they have to be tenacious.” Besores aid, citing the COVID-19 pandemic as an ongoing challenge for her organization and others. She said, though, “I know in my own association, we were — thank, God — very successful last year, but it took all of us being tenacious and working hard and not giving up.”

The hardships faced by Puerto Ricans, Latinos, and other immigrants encourage that resilience, too, Besore said. She recalls how after Hurricane Maria, Puerto Ricans banded together to support each other during that tumultuous time. Besore also mentioned that oftentimes immigrants work two or three jobs to better their lives, support themselves and their families. So for people who live the immigrant story, tenacity and resilience are often hallmarks of that experience.

> *Juan Amador:* **“We have to get past being the only one in the room.”**

The Need for Collaboration

For some people, leadership isn't about a solitary person; it's about harnessing the power of collaboration and melding minds. "I, by design, am a collaborator," Amador said. "I think collaboration is the essence of moving associations' priorities. It is the essence for building community, and it is the essence of who we are as a Latino community."

Amador loves to collaborate and bring the best of what he can share. His upbringing was influential in that worldview because the family unit in Latin culture is potent and powerful, he said. Thus, collaboration with others feels inherent.

"Part of the collaboration that I focus on is making sure that we have diversity," Amador said, because it's "important to include different perspectives."

But these kinds of collaborations take special effort.

"When you collaborate," Baron said, "there are things that you need to work through. And that is part of what we need to talk about — these are all learning opportunities."

Amador agreed, and said he often asks himself: "How can you bring the best of you to what you do?"

On a recent project for work, Amador realized he was the only Latino voice there. He took this responsibility seriously, saying, "When you're the only one in that room, you tend to represent your community."

Inclusion & Commitment

For Reyes, good leadership is all about inclusion and commitment.

"When I think about inclusion, I see my mom. I remember the things that she did in terms of being inclusive," he said. "Always making sure that everyone who was at our home was taken care of, that they had what they needed."

Placing others' needs before her own was how Reyes's mother lived her life, and now he brings that mentality with him to his work and thinks of putting customers and members first.

While his mom was a role model for inclusion, Reyes said that his dad was an example of commitment.

"My dad was always there; he was the first to volunteer. He was the first to show up and the last to leave. I'm driven to show up, not on time but 30 minutes before the event starts," Reyes laughed.

Baron said, "I think it's so important for us as association members to understand it's members first. It's about empathy. Meeting them where they are, (and asking) what are their needs?"

Concepts like inclusion and commitment can go a long way in creating an influential association culture that values all voices. Asking about and thinking about members' needs are helpful ways to approach association work.

How to Overcome Hurdles

Each of the panel's speakers shared hurdles they've had to overcome personally and professionally. As a result, it's made them stronger advocates for diverse talent.

In particular, Reyes said "The Pipeline" — that is, the route to leadership — presents an opportunity for others to advance and succeed. But access to it is crucial. Baron affirmed that it's important to be "allies and advocates for representation," strengthening the pipeline for Latinos.

"It's about the pipeline; the leadership pipeline is the recruitment pipeline is the diversity pipeline. We're always talking about the pipeline," she said.

"Having access to a career outside the norm," said Reyes, is made possible by this idea of a "pipeline."

Reyes realized as a young person that he had a "shallow network," illustrating this by sharing a story about how his family was often within his immediate reach for academic help and things like car repair assistance.

"At the same time, there were limitations," Reyes said, on what connections and solutions his family was able to provide.

He got involved in membership-based organizations because of what they could offer and how he could help. "We provide community, we provide access," he said. "I'd have to go out there and find someone to help bridge that connection."

When it comes to diversity, Baron said, "It all goes back to membership. You want that connection. We hear a lot: 'You can't be what you can't see.'" When representation is lacking, it hurts the Latino community on a holistic level.

> *Francisco Gomez, Factum Global:* **"Everytime a leader does something within the context of an underrepresented group, you are representing the community. What the 4 of you are doing here is a great example of leadership. Thanks for a great session!"**

Examine Hiring Practices

A diverse organization begins with the job interview: Hire diverse people to have a diverse workforce. “If your organization lacks diversity,” said Reyes, “go out and find it.”

Reyes underscored the importance of lifting others up, too.

“Right now, I volunteer as a leader within The Young Latino Professionals of Kansas City,” Reyes said. “And guess what? This is a premier organization of young Latinos and Latinas in Kansas City. Are you meeting with these people?”

Reyes suggested leaders tap into these kinds of organizations to find “high octane talent” and help underserved communities. He also suggested looking at regional and geographical diversity, too so your organization is an honest reflection of who your organization is supposed to represent.

“Being able to attract those people adds more diversity to your association,” Besore said.

And Amador emphasized the importance of starting early with the pipeline. “In my community, there was no pipeline — you just went to school,” he said, but it’s important for young people to have access to social capital.

The Power of Mentorship

“Mentoring is not something that I learned or grew up with, so it’s taken me a while,” Amador said. “Mentoring comes in different ways — it can be informal, it can be formal. Keeping the focus on the LatinX community: Why would someone need a mentor?”

Access to information, Amador said, is a key part of mentorship. “I’m a big believer in not recreating the wheel — if someone can teach me how to avoid a pitfall in the professional world, that’s huge!”

Amador credits mentors with instilling key information for him as a young professional. “I had a mentor who said to me, ‘If your meeting starts at 10 am, and you’re not there by 9:45 am, you’re late! Be the first one in the room.’”

> *Shari Olarte, American Association for Marriage and Family Therapy:*
> **“Thank you so much for having a session like this! As one of only two Hispanics in my association, this really makes me feel like there is a community out there to reach out to!”**

Mentors help guide you and look at failures from a growth mindset, seeking out the lesson first and foremost.

“I’m taking all those lessons that I learned and I’m sharing them with the LatinX community,” Amador said.

And it’s never too late to have a mentor or to be one. Besore didn’t have a mentor when she was coming up in her career, but she has informal “peer mentors” now, like Amador. Citing the need for “navigational support,” Besore said it’s crucial to act as a sponsor and an ally for others.

“You need outsiders to help (the Latino community) get some visibility and get that light shined on us,” she said.

“I think if you’re in the position (to help) and you see someone young, you think: ‘Maybe they don’t need to necessarily be struggling,’” Baron said. “Build that relationship with them. You end up gaining much more than you give.”

Being intentional is an impactful choice, too. Pick the right people to mentor, and pick the right people to be your mentor.

“Ask the right questions when you seek a mentor,” Amador said. “Surround yourself with people who will make you excellent. People who will elevate you.”

> *Danielle Baron:* **“We need allies and people who are committed to building that diverse leadership pipeline.”**

> *Ericka Ochoa, The American Association of Immunologists:* **“@ Shari I completely agree with you. I am the only Latina at my organization. I feel excited and motivated watching this excellent panel. I can relate to everything being said.”**

Section 12:

How to restore — and maintain — work-life balance in a post-pandemic world

By ???

When the pandemic hit and lockdowns sent the majority of us to our home offices (or kitchen tables), how did that disrupt the lines between work and home life? Did you find it more difficult to log out at the end of the day? Did you continue checking your emails after-hours because it was ever-present on your phone?

In a candid conversation, association industry veterans Shameka Jennings, Nikki Golden and Cindy Simpson shared how the pandemic rocked their senses of work-life balance, and what they've done to restore and maintain it.

> *Nikki Golden:* "It's so amazing how the small things, like just walking away from the desk for a set amount of time, helps you reset."

Setting boundaries

When the lines between work and play become blurred, it's important to build and reinforce boundaries in your own way.

For Golden, setting boundaries looks like closing the door to her office at the end of the day. She's built structure by adopting a morning workout routine and starting her day with exercise to clear her head and get focused. She eats lunch downstairs, away from her office, or goes for a walk during lunchtime. She also keeps email apps off her phone, which helps her tune out the demands of work during her personal time.

Jennings said another way she sets boundaries for herself is by blocking time off herself on her calendar. For example, if she starts working at 8 a.m., she would reserve time until 10 a.m. before scheduling meetings.

The importance of boundaries was demonstrated early in her career, Jennings said, when she watched a colleague work late hours every day. One day, her colleague left work on time and was penalized the next day. Because everyone around her was so accustomed to her working late, they thought she was skipping work by leaving at a normal time.

At Simpson's organization, her executive director implemented early days on Fridays, allowing the staff to clock out at 3 p.m. on Fridays.

"You don't realize how much those extra hours really matter," she said.

The importance of remote connection

Simpson, Golden and Jennings all leaned into remote connection through book clubs, professional groups and connecting with colleagues during the pandemic.

Simpson and Golden both have weekly check-ins with their colleagues to touch base on not only work matters, but how they're doing mentally and in their personal lives as well.

"It's interesting how much that normal salutation of 'how are you doing?' has taken on so much more of a loaded meaning this past year," Golden said. "Everybody is answering that with a different level of honesty than they used to."

> *Beth Knight, AVIXA:* **"Our association implemented Wellness Wednesday. Every Wednesday, we are able to take 30 minutes of our *"work time"* to do something for personal wellness."**

Golden said being honest about outside struggles and concerns creates a deeper sense of connectedness and closeness among colleagues, and drives stronger levels of empathy because you understand each other better.

In the wake of the George Floyd murder, Jennings created a Slack channel for staff members of color in her organization. The channel gave Black co-workers a place to discuss their thoughts and feelings in a safe space, thus creating a bond Jennings said she never knew she would be able to have with her staff.

A change in perspective

For many, the pandemic urged forth a shift in priorities and perspective.

“Nobody has ever said they wanted to work more when they’re at the end of their life. … For me, I’ve really taken that personally, and I really thought about where my life is headed during this next phase of my life, and where I want to go,” Simpson said.

Simpson said because she is at the stage of her life where she’s no longer climbing the career ladder, she’s had to reassess what’s important to her, and how to define herself differently from what she does.

Jennings, who is the director of meetings and partnership development for the National Coalition of STD directors, said she has often defined herself by her work, but the pandemic pushed her to slow down and spend more time taking care of herself.

“You are kind of like a house, and you need to take care of yourself. You can’t give your bricks away when you’re building your foundation,” Jennings said. “That’s something that really resonated with me, especially when I heard it during the pandemic, because life is sacred.”

Golden said the pandemic made her realize that mental breaks and self-care are absolute necessities. Work-life balance is hard when you’re used to putting 150% of yourself into work, she said.

“Sometimes 90% is really good, and not feeling bad about the fact that you can only give that 90% because you need to keep that 10%, or extra 40%, to yourself to build yourself up again, energy-wise. That’s been a great realization — that you can’t support others if you’re not able to support yourself,” Golden said.

After all, you have to put on your oxygen mask first before helping others in the plane.

“There’s a finite amount of time in a day, so you have to be careful in terms of how you structure that,” Simpson said.

> *Brien Lilja, International Dairy Deli Bakery Association:* **“I like the Wakeout app. It helps remind me to stretch and move.”**

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