

HOW TO EFFECT CHANGE NO MATTER YOUR JOB TITLE

A COLLECTION OF INSIGHTS
FROM **SURGE 2017**



SURGE
2017

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INTRODUCTION



What you're about to read is the result of an experiment in virtual collaboration. **SURGE 2017** assembled association professionals from across the globe to harness collective knowledge within a virtual summit of a completely new model.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own ideas. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook, which is the second of the 12-part SURGE series, delves into the 'How To Effect Change No Matter Your Job Title' session. It includes themes from the speakers' conversation, snapshots of ideas from guest speakers, contributions from attendees, links to further resources, and more.

Thank you to all who participated – and if you missed it, go to the SURGE 2017 [event page](#) to watch all the sessions for free, at your leisure!

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01

FEATURED SPEAKERS



Amalea Híjar, MPP
Nonprofit Executive

Amalea Híjar's association career spans over 12 years at both professional societies and trade associations serving the education, employment, manufacturing and medical industries. She is passionate about member engagement, volunteer management, and developing new products and services that enhance an association's member value proposition. She is a member of the American Society for Association Executives and previously served as Chair of the Component Relations Committee and was a founding member and Communications Chair of the Young Association Executives Committee. Recently, she was named one of "Forty Under 40" by Association Forum and USAE.





Brian Calvary, CAE

Brian Calvary has worked with associations for nearly ten years. Currently, he is responsible for the strategic direction and management of membership, and chapter relations of CoSN. Prior to joining CoSN, Brian was the Engagement Manager at HR People + Strategy, and the Membership Director at the Greater Washington Society of CPAs. He currently serves as a volunteer as part of ASAE's Membership Section Council. Brian has an MA and a BA from the George Washington University.





Lauren LeMunyan , PCC
Strategic Business and
Life Coach

Lauren LeMunyan brings clients direct, intuitive and playful feedback to help them dream, build and expand their businesses. Starting from the foundations of leadership coaching, she works with clients to build their vision and mission, establish their values, set goals, and hold them accountable through each milestone. Through each phase, she transitions from coach to partner to project manager. She is a former association executive.



02

GUEST SPEAKERS



Amanda Kaiser
Kaiser Insights LLC

Amanda Kaiser is a qualitative member researcher. She has conducted 319 member interviews and counting. Through these interviews she helps associations understand their members' goals, challenges, opinions, fears, and hopes. These insights become the building blocks of their member-focused vision and future-focused strategy, innovation and marketing plans. Amanda also writes a three-times weekly blog for association professionals. You can check it out and subscribe at www.SmoothThePath.net.





Jacob Wilder, CAE
Director of Communications
and Technology at BOMA
Georgia

In his role as Director of Communications and Technology with the BOMA Georgia, Jacob Wilder, CAE, is responsible for producing the association's publications, eCommunications, websites, awards programs, technology initiatives and membership recruitment. As a member of ASAE, Wilder earned the CAE designation in 2016 and earned his [Membership Management Certification](#) and Association Management Week (2014) certificate. Wilder also completed the Florida Society of Association Executives (FSAE) Qualified Association Specialist (QAS) certificate program. Jacob also serves vice chair of ASAE's Young Professionals Committee.



03

**THE STUDY THAT
SPARKED THIS
SESSION**



Case Study: Amanda Kaiser on the Association Innovation Research Report

In 2016, the National Business Aviation Association asked me to conduct some innovation research for them. There's a lot of information out there on innovation by big companies like Google, Apple, and Boeing. **What they really wanted to know was: what does association innovation look like?**

Do associations do innovation differently? How do they budget for it? Who does it? Where do the ideas come from? What do you have to do to be successful as an innovative association?

I was delighted to carry out the first phase of qualitative research with fifteen highly innovative associations. For a long time, I wrestled with one insight in particular: **that you can't have an innovative association without a CEO who is wholeheartedly behind it.** I wanted to believe that if you were a manager or contributor with a really great idea, you could bring it to life, and the association would become more innovative by example. But that's not the picture the research painted.

The research showed that the CEO has to be an active contributor to change. Without the CEO, support and innovation cannot thrive. And they need to do more than just talk about it - they need to be an active contributor. We found that the CEOs of successfully innovative associations were cheerleading, cajoling, giving people the right resources, and facilitating connections. **They took a hands-on approach to ensuring that change happened at their association.**

Successful innovation can happen in two different ways at associations. At a small association, the CEO is likely very involved. They probably spearheaded the very first innovation process, outlining and defining it. A CEO at a large association is likely not in the weeds like that, but involved at the level of supervision, making sure that innovation is happening. Championing it, upping morale, setting the right culture - **a good leader is taking it the whole nine yards.**

This session was created as a response to Amanda's research on innovation. Can positive change be effected from the bottom up? After all, a CEO supporting an innovation doesn't necessarily mean they are the one initiating it, so what might that look like?

04

THE IDEAL LEADER

What does it mean to be a leader at any level of the organization?

Sage words from the SURGE chat...

"You can influence change at all levels. Many times early in my career, my ideas became other people's ideas when I didn't have the influence directly. Change is at all levels: personal, professional and procedural ... A good leader takes people where they want to go. **A great leader takes people where they don't necessarily want to go but ought to be!** In my career, I have had some great leaders push me to move beyond my comfort zone."

- Vivian Alabama -

My organization has an innovative council made up of staff and they take ideas from all employees. The employees have a brief business plan template to use when submitting ideas. **The innovative committee makes decisions to go or not go with submitted ideas.** Our CEO is very supportive.

- Pat Stefanczyk -

The biggest struggle for us is getting all parts of the “machine” working in the right direction- when we get staff on board, volunteer leadership is hesitant to embrace or vice versa. It’s always a power struggle, especially for traditionalists within our organization. Interesting that so many deal with this!

-Alicia Skulemowski-

We hear a lot about faking it until you make it in personal and professional development, but maybe managers need something to *learn how to lead and not feel like a phony while doing so.*

-Greg Roth-

05

**FOCUS ON: CHANGE
AGENTS AND STAFF
STRUCTURE**

Who has the ability to be a change agent in today's world of work? When full-time fixed employment is precarious, the desire to take risks diminishes in favor of securing that next contract. Making change happen gets tricky when you don't have the safety net of a long-term position at an association to fall back on. On the other hand, freelancers and part-timers may have the critical distance from the internal politics of the workplace necessary for innovation.

For more background on changing staff structures, let's hear from Jacob Wilder.



"Staff structures at associations are undergoing huge change. During the recession, business owners and executive directors found that they could do more with less. **Now, they still push staff further by supplementing full time roles with technology, gig work and contract work.**

“Environmental pressures have also led to change in associations. For example, the Affordable Care Act in the US has increased hiring costs for employers. Associations have to look at their bottom line, not putting profits over people, but making wise business decisions on behalf of their members. Teleworking is on the rise, which is good for employee satisfaction and saves the association money. The staff who require an intimate knowledge of the organization need to be in the office, but for other roles, employers are freed up to hire remote workers. Automation and artificial intelligence are becoming more widespread, replacing workers and creating abundance.

“What role is work going to play in a world of abundance created by tech? How do you conduct training for staff and contractors under these new structures? How will associations respond to these issues that are challenging our members in their industries?”

06

HOW TO BE A CHANGE AGENT

With Lauren LeMunyan and tips from the **SURGE** live chat.

Question your motives and define innovation

Consider first **why you want to change your organization**: is it a specific policy, procedural shift, or project you're working on? Do you value having control over your workplace, no matter what that sphere of influence looks like? What about your current situation isn't working?

In the study we found that defining innovation was really important for associations. You'll see a few common definitions in the study. Plus we delve into the innovation continuum (evolutionary innovation vs. revolutionary innovation) and why understanding and tracking that is key.

- Amanda Kaiser -

*In associations, we spend a huge amount of time trying to define innovation when it already has a clear definition: **the creation of distinctive new value for the stakeholder segments the organization serves.***

- Jeff De Cagna -

Do your research

Observe your surroundings. **You are not operating in a vacuum**: there are boards, members and the history of the organization to consider. Take notes during meetings and conversations to find out who you can align yourself with, and who has opposing viewpoints.

Instead of getting carried away with your idea, **focus on the details**. Brainstorm with others to get consensus and collaboration, so people can speak up about issues pertaining to budget and resources, then move into the steps of execution like delegation and getting the membership on board. **Keep an eye on the blind spots that might have landed you in trouble before.**

The key to influence is finding the language that your managers speak. Do they want data and financial numbers, or are they influenced by articles and certain people's feedback? Sometimes it means trying to say the same thing via different avenues until it starts to sink in or more folks are buying in.

- Dawn Haglund -

*Generally I embrace change, but sometimes my own resistance to change is due to the work involved in implementing the change. For example, I've hesitated to change to a newer publishing software program because it would require creating a whole new template, which is very time consuming, for our monthly magazine production. An employee once told me, "Of course YOU are positive about change because (as CEO) you're the one in control of it." **In my mind, a key to effecting change is to manage how it affects others.***

- Cindy Crouse -

*You can't propose ideas until they've been tested/prototyped a little. **The reason so many ideas get shot down is because it's easy to have them, which means it's also easy to say no.** So, if your teams can test ideas before offering them, they stand a much better chance of being considered. It's "idea fitness" or Minimal Viable Product from Eric Ries' book, Lean Startup.*

- Greg Roth -

Be resilient

Unfortunately, not all associations are utopian workplaces where everyone cooperates. In the past, I have worked in a toxic environment, ruled by a scarcity mentality, and programs, policies and procedures were defended on the basis that *this is how we always do it*. I arrived with the mentality that we should make our lives easier by not wasting time on excessive steps. I had to put my neck on the line to have my solutions taken seriously.

If you believe in your idea, you will have people come and meet you head on. People wrapped up in a toxic environment will try to convince you it's the wrong path, or that you're a troublemaker for disrupting the flow of things. **If you've put in the work necessary to make your idea robust, grow a thick skin and persevere through the tribulations.** Bring other people on board as much as you can to make success a win-win situation. Substantial, long-term change takes work, so what is it worth to you? Will there be any reward?

And if you cannot shift the direction of your workplace as you wish, find another area where you can effect change, like an external professional group. Your idea might need a different environment to flourish. Then you will have a model or case study to present to colleagues in future.

Being a change agent doesn't make you popular and often times the outsider. Believe in yourself and believe in your mission and find someone to vent to!

- Vivian Alabama -

Track progress

Keep the innovation process dynamic by checking in on progress along the way. In fast-paced environments, following a plan by rote won't cut it. By having regular check-ins with colleagues, you will know when you might need to pause and shift gears, and you will be able to celebrate wins along the way to keep morale high. This recognition motivates people as a team and on an individual basis.

The challenge is to prevent your identity from getting so wrapped up in a project or point of view, that change, collaboration and innovation become constrained.

- Rick Rutherford -

Trust your instincts

If you are approaching a new organization and trying to gauge the atmosphere, you will know in your gut if the staff is receptive to change. **What first impressions do you get from conversations with HR, the website, and interviewers?** Ask open-ended questions about how they nurture change in the organization. If they rely on buzzwords without giving concrete examples, alarm bells should go off. Or maybe they set up meetings to hear multiple opinions, providing a mechanism for voices to be heard across the hierarchy.

Trust your gut on the front end to save yourself regret six months down the line. **Work is like dating: you're going to know straight off if it's a bad fit.** Some of us think we should change ourselves to fit into a workplace, but being yourself is the only sustainable method. Don't waste time in a situation where you can't blossom.

*Generally, if the change is needed that you're trying to implement and you have the wrong leadership, the change might not happen then. I have experienced leaving an organization and then staff reaching out that they are implementing that change because down the road leadership realized it was needed. **Sometimes you're just the agent to change, not the final change agent!***

- Vivian Alabama -

07

FOCUS ON: WORKING WITH FEEDBACK

With Brian Calvary

When you try to implement change in an association that is set in its ways, a “no” from above often means “not right now.” The best results come from being open to criticism of your ideas. We must all accept our own fallibility. Nobody is right 100% of the time, and that’s okay! **My advice is to take your idea, sharpen it, and bring it back to the table with more information.**

Back when I was young and full of energy, I had a supervisor who would often reject my ideas. But she was never dismissive. **She would walk me through her side of the story and explain why it wasn’t the right time.** This wasn’t lip service. In fact, it gave me a better look at the organization and the overall economic environment. It all came down to timing and what I could do to change tack. **Her feedback helped to develop my ideas into more fully-formed and relevant plans.**

Even if no one offers feedback to you on a plate, use your initiative to weed it out of them. My favorite question is “why?”. Asking it makes me feel like a four-year-old, but it reaps results. **If that’s not how things are done, then why not?**

Forming alliances is also a great way of getting constructive criticism from peers. Figure out who wants to change the thing you want to change. What are *their* ideas? And who would be in opposition to your plans? Those who disagree with your approach may be more helpful if they have alternative, fresh perspectives to act as counter-arguments to your own ideas.

*From the **SURGE** chat:*

I agree with Brian: care more about the change happening than who gets the credit for it.

- Tracy Vanneman -

If you focus on the data and on the intention of the change, the ego is set aside. Move from the egotistical to statistical. I bring the data and feedback from members to the table and then say, "you can ignore me and my wild ideas but you can't ignore the data and the needs of members."

- Dan Ratner -

One of my favorite questions to uncover resistance is: "what concerns you about this idea?"

- Greg Melia -

Some of the biggest value new staff bring is to ask WHY. It's easy for staff to not see new opportunities because they stop asking why.

- Allen Lloyd -

Want to learn how to host your own virtual event, much like **SURGE 2017** ?

AssociationSuccess.org is in the process of creating an online course that will walk you through the steps involved in putting on your own interactive virtual summit.

Want to be notified when the course is available?

SIGN UP HERE

08

CASE STUDY: CHANGE BEYOND THE C-SUITE

*Amalea Hajar applies lessons from the book *Switch: How To Change Things When Change is Hard*.*

At one association where I worked, there was a gap between students in the field graduating and becoming members. We wanted them to join sooner and become highly engaged members. We had two levels of membership and while the benefits were the same, the higher level required a robust application including recommendations. However, retention among members was higher.

To start, I interviewed members who had joined at the higher level immediately after graduating, which gave me insights into why they did as well as what the barriers (perceived or actual) to applying were. Next, we changed the marketing materials to reflect those insights. And finally, we clarified and better communicated the value of the higher level membership to the target audience.

For the second step, which I think of in terms of soft skills, the Heaths discuss motivating others in their book *Switch: How To Change Things When Change Is Hard*. First, get people to **feel something about the change** you're trying to achieve. Second, you **breakdown the process** into smaller parts. Third, you **focus on building up the people** that you're trying to get to change their behavior.

To inspire people, we created a video about the value of the higher level membership with testimonials. We created infographics around key data points that supported the value of the higher level membership, such as how it affected salary. The barrier we identified was the application itself: **members were overwhelmed by it, especially the requirement of recommendations.** I worked with the application review committee to share template recommendations. This showed the members that recommendations weren't as cumbersome as they thought, while giving them an example to share when requesting them.

The final step is what I call the execution strategy, and what the Heaths call shaping the path. The three aspects of this include **changing the situation, creating habits, and spreading the change.** Changing the situation meant several procedural things, such as removing a monetary penalty and waiving the application fee, to create a financial incentive at a time when money is tight. Creating habits and spreading the behavior were hand-in-hand, because I did things like **create a toolkit** for local member leaders and professors to help the students apply. This led to the number of students applying for the higher level membership to increase from one to 36% over two years.

As the Heaths say, "for things to change, somebody somewhere has to start acting differently. Maybe it's you, maybe it's your team." **In the end, all it takes is one passionate person with a vision to effect change.**

09

WORD CLOUD

What were the most discussed topics in the attendee chat? The more frequently a word was used, the larger it appears in this image!



10

FURTHER RESOURCES

During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about the future of learning. We've compiled them into a list here. Keep on learning!

Key Resource

- [Association Innovation Research Report](#)

How to be a Change Agent

- [Podcast on Wake-up Calls for Change](#)
- [Article: The Network Secrets of Great Change Agents](#)
- [Fixed vs. Growth Mindset video](#)
- [Switch by Dan and Chip Heath](#)
- [Mindset by Carol Dweck](#)
- [Article: A Guide to Effecting Change at Work](#)
- [Article: How to Work with Feedback](#)

On Leadership

- [How to be a good leader: video](#)
- [Article: Can Only the C-Suite Lead Change?](#)
- [True Professionalism by David H. Maister](#)

Staff Structures

- [Article: The Dark Side of Teleworking](#)
- [eBook on creating project toolkits](#)

