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LOCAL PERSPECTIVES ON THE ASSOCIATION INDUSTRY PATH

A Collection of Insights from
SURGE Co-Creation

Thanks to our partners, who convene to further
the association profession!



INTRODUCTION

The following pages house the results of an industry-wide virtual collaboration.

SURGE Co-Creation assembled association professionals from across the globe to harness collective knowledge, through a virtual conference focused on transformative ideas and designed to maximize social learning.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own thoughts. 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, one of the eleven-part SURGE series, delves into the session, *Local Perspectives on the Association Industry Path*. 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 Co-Creation** [event page](#) to watch all the sessions for free, at your leisure!

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01

FEATURED SPEAKERS





Lowell Aplebaum

CEO, Vista Cova

Lowell Aplebaum, 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. Lowell frequently provides dynamic sessions to organizations – conducting deep-dive interviews and getting members and volunteers involved through experiential learning approaches. He currently serves as the Chair-Elect for the overseeing commission for the Certified Association Executive certification, and Chaired ASAE’s Task Force on CEO Pathways. He is the creator of a master-level learning series called Through the CEO Lens and Association Charrette – a co-creation retreat experience. His work on global efforts for associations has included experience across five continents, hundreds of volunteer groups, and all 50 states in the U.S.





Jeffers Miruka

President and Founder, African Society of Association Executives

Jeffers Miruka is the President and Founder member of the African Society of Association Executives (AfSAE). AfSAE is a pan-African professional community of association executives formed in 2015 to serve as the professional society for those within the Association Management profession in Africa. Mr. Miruka is also the Executive Director of the African Association of Agricultural Economists (AAAE), a Nairobi based association of agricultural and development economists with over 3000 members spread globally. Mr. Miruka has over 14 years combined experience in association management and Business Events – meetings, conventions, exhibitions, incentives, corporate, associations, intergovernmental, nonprofits. He has a rich experience in association development, convention bureau setup, and is a frequent speaker and contributor to many global publications, media interviews and association forums.

Mr. Miruka is also the founder director of the very first, African association management company (AFAMCO), a joint venture with the Talley Management Group Inc. (USA). AFAMCO currently manages three African associations with more expected to board. Together with other industry players in Kenya, he helped establish the Kenyan Association of Business Events (KABE), a new association for Kenyan businesses industry engaged in Business Events.

With extensive travels around the world, he is well known internationally in the MICE Business events industry and undoubtedly recognized as a distinguished African associations ambassador and a leader of the associations movement in the continent. Mr. Miruka is a member of the American Society of Association Executives (ASAE), among the many association memberships he holds. Jeffers has a Master of Science in Global Marketing and currently preparing for his Certified Association Executive (CAE) certification.





Octavio Peralta

CEO & Founder, Philippine Council of Associations and Association Executives

Octavio 'Bobby' Peralta, affectionately called, "The Association Man," is presently the Secretary General of the Association of Development Financing Institutions in Asia & the Pacific (ADFIAP) and the World Federation of Development Financing Institutions (WFDI). In November 2013, he founded the Philippine Council of Associations and Association Executives (PCAEE) and, in March 2015, initiated the setting up of the Asia-Pacific Federation of Association Organizations (APFAO). He is a long-time member of the American Society of Association Executives (ASAE). A PCAEE-certified professional association executive, he conducts lectures and speaks on association governance and management in the Philippines and abroad. He writes a weekly column in the Philippine Business Mirror, blogs regularly on the subject, and contributes articles to local and international association publications.





Toni Brearley

CEO, Australasian Society of Association Executives

With 15 years' experience in the not-for-profit sector, Toni has held senior positions in sector peak bodies, community service organisations and is currently the Chief Executive Officer of the Australasian Society of Association Executives (AuSAE) – the peak professional association for association for association leaders in Australia and New Zealand. Toni has particular expertise in stakeholder engagement, marketing and communications, and policy development. With previous commercial experience in sales and business development, coupled with a passion for people, Toni has developed a unique understanding of both the challenges and rewards of the not-for-profit sector.





Ioannis Pallas

Program Manager, European Society of Association Executives

My studies in two respective fields, International Political Economy and International Relations provide me with the analytical skills to find combinative solutions in perplex situations and grasp on the full extent and consequences of a political or economic development. I have worked in consulting, lobbying as well as in development projects evaluation. I possess a thorough knowledge of EU and country-member politics and an insatiable need to be constantly up to date with an array of topics spreading from politics to currencies and commodity prices. I run the Secretariat of the European Society of Association Executives. I speak four languages. and I'm based in Brussels.



02

GUEST SPEAKERS





Jeanette Gass

*Program Development & Special Projects
Manager, The Optical Society*

Jeanette Gass, CAP, is currently Program Development & Special Projects Manager for The Optical Society (OSA) in Washington, DC. She supports OSA's global presence including providing assistance to OSA's European office, reviewing applications for global meeting grants, and planning programming with international sister societies. In addition, she works on OSA's Awards and Honors portfolio and manages the book review program for Optics & Photonics News. She holds a Master of Science in Nonprofit and Association Management, a Master of Arts in Global Communication, and a Bachelor of Arts in International Studies and Anthropology. Outside of OSA, she serves on ASAE's International Section Council and volunteers with the International Association of Administrative Professionals (IAAP)





Vicki Hawarden

COO, Hawarden Group

Vicki Hawarden, CMP, PGP, currently serves as COO for Hawarden Group, consulting with associations to help them increase revenues and lead through good governance. Vicki is a 25-year veteran of association management and the events industry, having served as a senior executive for several associations, including the International Association of Exhibitions and Events and Meeting Professionals International, and as CEO of International Association of Venue Managers and the IAVM Foundation.

While at MPI, she led the development of the first global meeting industry standard and helped evolve the CMP program to one that is globally applicable. During her tenure at IAVM, she was instrumental in nearly doubling the membership, developing the Certified Venue Professional program, and turning the association around from significant deficits to stable contributions to reserves. Ms. Hawarden served on the Event Industry Council board for 5 years and on numerous committees and chapter boards with the Professional Convention Management Association and the American Society of Association Executives. She can be reached at vicki@hawardengroup.com.



03

THE THREE AREAS ENHANCED BY PARTNERSHIPS

By Lowell Aplebaum

Though the world may be big, even across oceans, the association community is small and powerful. Across the globe, associations tackle similar challenges and opportunities: how to grow membership, how to provide dynamic learning and meetings, what is good governance and how do we advocate on behalf of the industries we serve, to name a few. Suffice to say, we are all constantly looking to improve as organizations and professionals in our field, and manage bottlenecks. With universal themes and possibility, it would seem that **there is an opportunity for a greater global connection, guided by a singular mantra: Stronger Together.**

I mean, that's the whole point, right? Associations help companies and individuals associate, form connections, all for a purpose. And I think the **better that we do that, the more impact we can** have and that's not just for an industry, that's also for us as professionals and as an industry. As we are tackling similar problems, we could likely use similar solutions, although areas of focus and priorities may differ from one geographical region to another. If we take on a global perspective to problem-solving, we would have the wealthiest pool of knowledge to draw from, allowing us to be better equipped when facing problems. There are models in development, being piloted, and succeeding where organizations look beyond their borders to discover how global corollary competitors could instead be collaborators. As we look abroad, there are few areas where organizations can reflect on building these stronger relationships:

- 01 Where are **our areas of value focus** in line with those of similar membership/non-profit organizations elsewhere – where the value we create could either serve their audience, where their value could serve ours, or where there could be a place of co-creation? Though membership models may shift around the world, **being of service and value remains a constant.**
- 02 From a governance perspective, what voices of insight, knowledge, and trend identification would **better inform our leaders at home** as to the needs and priorities of those abroad? How could this information then shift the goals and vision of the organization to truly include a global line of sight?

03 Who are the **thought leaders and organizational champions**, domestically and globally, who can lead the way in having these conversations? Who are the individuals that will hold at heart the best interest of the organization, and bring to the table an open ear and hand – looking to listen, learn, and find opportunities for stronger together?

Opportunities exist the moment we look beyond our borders, and these are the important questions we must ask ourselves to be able to identify them. There is a lot to learn from one another and we need to be taking an active interest to stay informed of what is happening elsewhere to form stronger relationships and truly be united. While not comprehensive – any of these places can be enhanced by partnerships and help an organization **design a stronger global approach**.

FROM THE CHAT

“One of the volunteers I work with regularly ends many of his slides with the Swahili saying ‘If you want to go fast, go alone. If you want to far, go together!’”

- Randi Sumner -

“My last job had an acronym list to help people better understand what was going on.”

- Lisa Campo -

“Collective thinking begets better thinking, so problem-solving with others increases opportunities for value and implementation. People thrive in connections, thus increasing the connection curating is a wave of the future.”

- Tammy Heflebower -

“I’m struck by how the conversation reflects partnership/relationship building with our state affiliate organizations; seeing them as ‘peers’ with whom we can co-create value for stakeholders.”

- Dennis Sadler -

04

LOCAL PERSPECTIVE: BRUSSELS



By Ioannis Pallas

No matter where you are in the world, associations are encountering similar challenges, and then also finding similar opportunities. Globalization presents us with opportunities to collaborate and flourish, but also has its own set of bottlenecks that aren't necessarily seen locally. Differences can range from barely noticeable to rather remarkable from one geographical region to another, or even from one discipline to another, but one thing for certain is that we can all benefit from sharing our experiences and learning from each other.

I run the Secretariat of the European Society of Association Executives (ESAE), based in Brussels, and I would be happy to share with you my observations from working here, and therefore give you some local perspective.

ESAE comprises of European and international association leaders. Brussels is a multicultural, multinational region where over 2,500 associations are based. Many of those do advocacy and monitoring of the decision-making process and the implementation of the rules of the European Institutions on behalf of their members. Others are based here because they can make good use of the abundance of knowledge produced, which is easily accessible, and the high quality of well-educated and experienced human resources. Some Associations are large and highly professionalized while others are smaller with more loose structures; but all those working for them face similar challenges.

The reason why I find being part of an Association important, is because it is somewhat a lesson of civics for everyone involved. It's an example of how society works in a small scale, and the way Associations interact with each other, is a prime example of multilateralism in practice. Associations serve as a kind of buffer zone between the citizens and the decision makers, making sure that the voices of smaller actors can be heard, and thanks to the equal treatment and transparency rules set by the Institutions, this is often the case.

What we see is that people, although they are concentrated in a small geographical location, don't speak to each other all that much, often because they ignore the amount of help they can get. There is indeed a need to create a sense of community and this is something ESAE has been working on. We create a framework where people can come together and exchange ideas and best practices on relevant topics, exactly like on this platform. Training is at the core of our activities; we hold at least one event per month for

our members, on different topics that might be important for association leaders, like how to use digital tools for governance and communication, how to better prepare for changes in the political landscape, how to lobby better and smarter, or how to listen more closely to your members and innovate.

Training is a major way for us to bring our members together because before and after the training, you have networking, and networking is what creates a sense of belonging which is important in our profession. What we sometimes find difficult to tackle is how to communicate that to the members that are not able to be in the same place at the same time. As great as recordings are to share knowledge online, there are things you are better able to say in person than at a distance.

When it comes to learning, we have a large array of partnerships; we are partners with destinations, and of course a lot of associations all around Europe, which help us create a network of engagement. We also collaborate with consultancy firms that sometimes help us bring in some experts to our workshops and it really helps to have their knowledge and global perspective to give advice to our members.

We also collaborate closely with a local University on an executive masters program on International Association Management, the first of its kind in Europe.

I hope this gave you an insight on how things work in the Association community in Europe and allow you to find the similarities of opportunities and challenges where you live and work. As we progressively go global, the more we communicate and collaborate, the more we will be able to achieve.

FROM THE CHAT

“To me, true collaboration starts with lots of listening!”

- Danielle Duran Baron -

“The challenge of getting people around the world to understand the value of membership is something that I think is common among all associations.”

- Jeanette Gass -

“International association presence has proved to be tricky throughout my career. Part of it is just nomenclature and understanding what associations are. But as with any product, people will buy it if they find value. Marketing, communication and tangible value are paramount.”

- Jon Bassford -

To the question: “Can associations be problem solving for their members in ways they had never thought to do before?”

“They can if they are future focused, agile, innovative, transparent, collaborative - things most associations are not, but can learn to be...”

- Maddie Grant -

05

ENGAGING YOUNG PROFESSIONALS IN YOUR ASSOCIATION

By Jeanette Gass

Young professional members are the future of associations, so it is vital to keep them involved. As a young professional (YP) myself, I can tell you that what we want most from associations is a **sense of community**. This includes being able to make personal connections, use available programs and services to fill gaps in our professional development, and contribute to the association's advancement.

FACE-TO-FACE INTERACTIONS CREATE MEANINGFUL CONNECTIONS

Despite advancements in technology, we still value face-to-face interactions as they create authentic, meaningful, and valuable connections. Associations are ideal avenues for meeting people. Hosting young professional meetups at conferences and providing opportunities to interact with more senior members help us create connections and see the value of membership.

TAILOR PROFESSIONAL DEVELOPMENT FOR YPs

Young professionals are eager for professional development tailored to their specific needs. Associations have the tools and resources to meet this need. Sometimes, fees can be a barrier to participation, but capitalizing on the skillsets of young professional members can help combat this. **Peer-to-peer learning opportunities can help lower costs and generate interest in participation.**

CREATE ENGAGEMENT BY INVITING YPs TO VOLUNTEER

To create engagement and keep young professionals interested and invested in the association, invite us to volunteer, and not just on the young professional committee. Having the ability to participate in association operations and contribute to organizational advancement creates a sense of belonging and want to continue membership. We bring different perspectives to the table, which can help the association stay relevant and

exciting for younger members, but are not always sure we have the appropriate qualifications for volunteer service. Creating **young professional-specific seats on committees** or having a **willingness-to-serve form** letting association staff know who is interested in volunteering when ad-hoc opportunities are available are two ways to bring young professionals into the mix.

Personal invitations to serve let YP members know they are qualified for the role and their opinions are wanted. Once we're in the room, encouragement that our ideas are valuable and showing a commitment to understanding our viewpoints can make us feel more engaged and willing to further contribute. It's not enough just to "check the box" saying YPs are participating on the committee. **Actively listening** to our thoughts on a topic and giving them the same consideration as anyone else's are essential.

YP members, like all members, want to **feel valued and that their voices are heard**. A sense of belonging with opportunities to contribute and advance the association keep YPs engaged. This creates a purpose to being a member, value in being part of the community, and want to continue.

Ultimately, **YPs want to make connections, build networks, advance our professions, give back, and do good in our communities and the world**. This is what associations are made to do, but they will not be successful without members. YPs are current and future members, but the value proposition for membership decreases as engagement with the organization decreases. Engagement leads to continuation of membership and association operations which are necessary for organizational stability and longevity.

Engage your YP members now and there is a greater chance they will stay members and volunteers and you can **create a pipeline for your organization's leaders and donors**.

006

ASSOCIATIONS NEED TO GET BETTER AT GOVERNING

By Vicki Hawarden

Every year, thousands upon millions of hours of dollars are wasted and volunteers and staff get burned out all because of boards that are flying blind without a clue on how to really be a board. So why do we have so many poorly performing boards out there especially since so many of them clearly want to be a force for good?

I think it's simple: most boards just don't know how to be a good board, much less a great one. They walk into a board room and just follow along with no system or clear expectations. The solution I believe is for a board to operate using a system, one that makes it possible for a group of volunteers to successfully lead.

DEFINING THE BOARD'S ROLE

Firstly, every board needs a job description outlining what its role is and how it will conduct business, as well as how it will delegate to the CEO. This is the board's commitment to each other and to everyone that it will do the work it needs to be doing and that it will do it in an honoring way.

DETERMINING EXPECTATIONS AND VALUES

Secondly, the board should determine what results they expect an organization to achieve. This is some of their most important work. The board must also decide what values it holds and it must make clear how those values should inform the actions or behaviors of staff.

THE IMPORTANCE OF MONITORING

Finally, the board should monitor the CEO to ensure the board's expected results are being achieved and its values are respected. If a board operates in this way, its meetings will be transformed.

Instead of listening to presentations, approving staff actions, micromanaging or reacting, the board is talking about organizational results, owner expectations, board performance or other critical and important functions.

It is a thing of beauty to see and experience when done well and it is inspiring to all who are part of it, including the staff. Bottom line, associations need to get really good at governing so they can attract the best people, inspire their members and achieve great results. We have big problems to solve in the world and to do that, we need great associations led by great boards.

07

FURTHER RESOURCES



During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources regarding associations around the world. We've compiled them into a list here.

- [CueCareer](#): aggregates the resources of industry associations for career exploration/navigation and workforce development.
- [Practical Tips](#): on a variety of topics from Philippine Council of Associations and Association Executives
- [Online Publication](#): The journal publishes original research about how African agriculture interacts with local and global economic systems and policy regimes in its impacts upon people.
- [Mentoring Program](#): The AuSAE Mentoring and Leadership Program helps develop association professionals in their current roles and prepare aspiring association leaders achieve their career goals.
- [Events](#): Exciting happenings by ESAE! Feel inspired or plan a trip.
- [Article](#): What can associations learn from a possible universal human experience?



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