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MIND THE GAP: **ADVANCING THE** **WORKFORCE THROUGH** **ASSOCIATION** **EDUCATION**

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, *Mind the Gap: Advancing the Workforce Through Association Education*. 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!

TABLE OF CONTENTS

- 01** FEATURED SPEAKERS
- 02** GUEST SPEAKERS
- 03** JOB CANDIDATES ARE STILL STRUGGLING TO COMMUNICATE
- 04** THE ROLE OF ASSOCIATIONS IN THE EDUCATIONAL LANDSCAPE
- 05** HOW MICRO-CREDENTIALS ARE AFFECTING LEARNING PATHS
- 06** HOW TO RESUSCITATE YOUR EDUCATION
- 07** FURTHER RESOURCES



01

FEATURED SPEAKERS





Keith Segundo

*President/CEO, Limitless Association
Solution Resource*

Keith Segundo is chief executive officer and president of Limitless Association Solution Resource, his Littleton, the Colorado-based credentialing management company. He has more than 15 years of experience in the association industry. Keith is responsible for serving as the chief strategist for association non-dues growth. He provides audit and assessment processes for all business development activities as well as strategic development, implementation, and executive management for many of Limitless' clients. His services specialize in niche areas of association growth to include but not limited to Membership, Non-Dues Revenue, Marketing, Accreditation Counseling and Certification/Certificate Program development.

Previous roles and responsibilities were as Chief Marketing Executive for Florida's largest Association Management Company (Partners in Association Management), which includes but not limited to business development and executive management. Keith has also worked strategically with many state and national associations alike. He has extensive experience with volunteer and staff development.

As a 2015 award winner for "Young and Aspiring Professional", by Association Trends as well as a current Board member of the Colorado Society of Association Executives (CSAE), and past Board member of the Tallahassee/Florida Society of Association Executives; Keith's passion for association management is reflected in the success of all the clients and volunteer organizations he serves.





Colleen Loeffler

Director, CompTIA AITP

Colleen Loeffler Phonwiang, CAE, is the Director of CompTIA AITP, an individual membership association serving tech and IT professionals under the umbrella of CompTIA. In this role, Colleen grew membership from 3,100 legacy members to over 15,000 current members in the first year and developed new membership programming and resources. Prior to this role, Colleen was the Director of Member Outreach at the Illinois CPA Society (ICPAS), charged with enhancing the membership sectors for the students, young professionals, and university faculty, as well as, creating a concierge-type services for mid- to large-sized accounting firms. Before being employed at ICPAS, Colleen worked for the National Association of REALTORS® and its affiliate organizations for over twelve years driving excellence in education programs, increasing membership, and successfully promoting missions of global organizations and designation education programs for business specialties in commercial investment, second home markets, international real estate, and in building a diverse workforce in the industry. Colleen is a Returned US Peace Corps Volunteer serving in Thailand from 1998-2000 and holds a Bachelor's degree in Communications from the University of Notre Dame and a Certificate of Nonprofit Management from the University of Chicago. Colleen is also earned her Master's in Nonprofit Administration through the Mendoza Business School at the University of Notre Dame. Colleen has held her CAE since 2009 and a certificate from the University of Chicago in Nonprofit Administration. She resides on the northside of Chicago with her husband and two daughters.





Aaron Wolowiec MSA, CAE, CMP, CLEA, CTA, CTF/QT

CEO, Event Garde

Aaron's obsession with learning traces back to preschool, where a knitted purple people eater taught him important life lessons (like cleaning up after yourself). All these years later, Aaron's honed his craft and now designs engaging, multisensory learning experiences for association learners, resulting in the acquisition of new knowledge and skills, the forging of new relationships, and the application of new ideas and perspectives in the workplace. A serial learner and entrepreneur himself (with an alphabet soup of letters trailing his name), Aaron is nationally recognized for his professional development work with boards, learners, staff and volunteers. Having launched four successful brands – **Event Garde** (coincidentally reprising his early fascination with purple), **Healthy by Association**, **Review My Speaker** and **FacilitateMI** – Aaron's equal parts practitioner and theorist. While the hours are long, Aaron ensures there is no shortage of fun amidst the Slack notifications, email pings and video chats – from the personal connections he shares with each client, partner and colleague to the precious moments of free time spent stalking the latest episodes of his favorite true crime podcasts.





Veronica Diaz

Director, EDUCAUSE

Veronica is the Director of professional learning at EDUCAUSE and ensures that learning and development programs support and advance association priorities and serve member needs. She is responsible for contributing to the strategic management of the professional learning product portfolio serving over 2000 higher education institutions in the US and abroad, along with corporate, not-for-profit associations and K12 organizations, building and coordinating with partners to create new learning programs, and providing operational oversight for existing programs. Veronica also directs the association's online programs, which currently serve over 10,000 members annually. She supports face-to-face events and conference-based learning experiences and manages the EDUCAUSE microcredentialing program and virtual and place-based mentoring programs, serving several hundred members annually. From 2009 to 2018, Veronica served as the associate director of the EDUCAUSE Learning Initiative since 2009 conceptualizing and developing resources that supported its 300+ member institutions in integrating teaching, learning, and technology on campus.



02

GUEST SPEAKERS





Lynn Mortilla-Rocap, CAE, CMP

Education Director, ADED

Lynn Mortilla-Rocap, CAE, CMP, is the Education Director for The Association for Driver Rehabilitation Specialists (ADED). Specializing in the fusion of education and implementation, Lynn leverages more than two decades of experience in the association industry working to create dynamic conferences, develop impactful programs and design events that amplify learning. A thought leader in nonprofit association strategy and educational program design, she provides practical, easy to implement strategies for success and extols revolutionary approaches to create impactful and memorable learning experiences that make a measurable difference.



03

**JOB CANDIDATES ARE
STILL STRUGGLING TO
COMMUNICATE**

By Colleen Loeffler Phonwiang, MNA, CAE

We often stress the importance of soft skills in the job market, and this is particularly true when it comes to a lack of communication skills affecting the employability of job candidates.

As the Director of CompTIA AITP, an association for IT professionals, we talk a lot about not only the skills gap but a confidence gap. Qualified candidates don't apply for jobs because they have a preconceived notion of what is a tech worker. Most think a tech or IT professional is just someone hidden in the back office in a corner somewhere and playing with wires and the server. It's so much more than that. Do they listen well to people's problems to help them solve? What's their communication like? These are all things that are quite broad and are desperately needed—especially from those that are attracted to the tech field naturally.

There are many different types of learners that hope to serve, like the 18-year-old that's starting in school or a tech program and there are those mid-careerists who know they are missing something and therefore return to an association to get that intel. Over 800,000 jobs openings exist in the tech industry right now and not enough people that are getting a bachelor's degree or who are enrolled in tech colleges to fill that pipeline. So where are the other people who have the talent and who can go into that field? Whether they're 40-year-olds who are shifting into this area because we're expanding that definition of what a tech job is or gamers that are looking to explore a career in tech—they're coming from all over the place. We call them **career shifters**.

We did a lot of research and surveying of what students and employees think are soft skills in a job that they need and what employers are asking for. In our organization, we surveyed hiring managers and HR staff to understand the skills that they think are missing in job candidates. **There is a clear disconnect in these groups.** For the hiring managers, teamwork, collaboration, and communication were listed as the top skills needed in tech positions, as well as presentation skills in some cases. For the job candidates, it was a little different. When you ask those looking for employment, they think, "Oh yeah, I got those skills." But in interviews, the HR and hiring managers thought the **candidates couldn't communicate their own stories and experiences** that made them qualified for the position. There was a lack of awareness of what the candidate could do. Even if it was a recent graduate who gave a lot of presentations, there's a difference from negotiating with other teammates on a project and making a case for the need for a new software to streamline systems and fulfilling a need by saving a company money. The individual could only talk to how something worked versus why you need to have it.

Furthermore, when you think about writing a job description, you usually put in details in that you think might have been lacking in a past employee or that you wish that you had someone who could handle and do. Right? With that in mind, we also took job descriptions posted and aggregated them to find the common denominator in all those descriptions that are listed on indeed.com. Again, **communication was number one** as a need here.

So let's ask ourselves the good questions. What's the role of an association to help fill that gap and provide that opportunity for people to gain that experience? What organization could be better suited to enhance communications skills or problem solving skills? Well, associations with local networking events and virtual and in-person educational training is a perfect place to help those new in the industry!

FROM THE CHAT

“We need to be better marketers to professors and students. That’s a tall order.”

- Carolyn B. Thompson -

“Industry specific associations need to pinpoint the skills required for all levels and jobs within that industry. Often a job analysis is a starting point but that can also be cost prohibitive for some associations. Strong member communications and well designed member and industry surveys can help build a thorough analysis. Continual monitoring of the industry can help keep the results current. Once gaps are identified a multifaceted approach to education with a clear roadmap of how to earn the education, skills and possible badges or credentials would help guide the association’s educational blueprint.”

- Lynn Mortilla-Rocap -

04

THE ROLE OF ASSOCIATIONS IN THE EDUCATIONAL LANDSCAPE

By Aaron Wolowiec

In the educational landscape, associations have an important role to play in helping learners become job-ready. By learners, I don't just mean those at the start of their professional careers, but also those at a later stage looking to make a change in career paths. We can find them in our staff, our members, and just about everywhere. We never stop learning, do we?

While higher education is the traditional medium to develop skills and to advance in your career, **associations provide a different solution**. In some ways, we even compete with higher education institutions.

HOW CAN ASSOCIATIONS CATER TO LEARNERS?

First, let's look at gap analysis. What is it? In its simplest, most purest form, it's about **understanding the actual performance against the potential or desired performance**. Basically, associations want to spray some association foam to fill that gap, to fill every crevice and nook and cranny between where learners are and where they want to go.

They need to identify what knowledge, skills, and abilities learners need in order to:

- A) Get a specific job or,
- B) Advance in the career ladder or get a promotion.

For example, there seems to be a gap between theory and practice; what's being taught in the classroom isn't necessarily the skills that are needed for candidates to actually be placed and be successful in jobs. Associations can fill that gap. If we look at training for event planning, I know about places that are training the next generation of event planners with professors who aren't actually planning meetings and events. So they're not teaching things like negotiating difficult contracts, navigating the wide disparities in hotel WiFi, overcoming room block poachers, and incentivizing attendees inclined to book on Airbnbs rather than in the hotel room block—mainly because those professors haven't encountered these situations in the real world.

To cater to your learners, it really starts with **evaluating your current education portfolio, and then adding programs, products, services that could support learner growth and development**, to fill the gaps and to be job-ready. But then, be really clear and intentional about sunsetting programs, products and services that are past their prime. I think we hang on for far too long to things that are no longer a good fit for us and our members. Like Marie Kondo in *Tidying Up* on Netflix, associations need to fold up some of those things that aren't serving them well. Thank them, say goodbye and put them in the pile to be donated, and be open and prepared to welcome something new into your space.

The accessibility and the number of ways that associations can provide learning are abundant in terms of delivery platform, model, cost, and content. I like to think that our education portfolio is broadly a mix of not just face to face programs and online learning options, but also resources that communicate value and that help teach our learners and our members. These include learning vehicles such as blogs, newsletters, websites, magazines, podcasts, and the like.

However, this comes with a word of caution. Lately I've seen firsthand this overabundance of information and content—we think more is more. But ultimately **our learners lose when we adopt this mentality**. We challenge them to make sense of the various communications we send or events we hold. To be successful, associations need to become the guide to help learners and job seekers navigate the myriad ways to learn within our organizations. It's almost like an institution of higher education having an advisor lead learners through the development and implementation of a systematic curriculum plan.

Using gap analysis will help us develop and deploy **a more realistic education portfolio** that our members actually want (and need!). So instead of taking a stab in the dark in terms of the content we should be offering, let's leverage this approach. It will help us provide learning opportunities that we know they need and we know they'll be interested in.

FROM THE CHAT

“Interesting note is that many of our state associations have looked at the reasons why members were losing their jobs to specifically inform the learning programs they were developing.”

- Dennis Sadler -

“I see a major gap, both with my clients and myself, in associations helping mid-career professionals. I feel like, historically, we’ve done a decent job helping new grads, but my experience is that more advanced education/content is a real challenge for us to provide.”

- Elizabeth Engel -

05

HOW MICRO- CREDENTIALS ARE AFFECTING LEARNING PATHS

By Veronica Diaz, PhD, CAE

A hot topic on the rise in the education space is micro-credentials. What are they? Simply put, they are meta-data rich, competency-based, digital credentials that can be shared on various platforms to showcase specific skills an individual has acquired through a learning experience. As the Director of Professional Learning at EDUCAUSE, micro-credentials have been of particular interest to me, as well as how they support learning in associations.

Next generation platforms are evolving to put a spotlight on the skills represented in micro-credentials' meta-data. For instance, when someone is viewing a micro-credential and they click on the skills, they'll see workforce data, jobs, income ranges, employers seeking the skills developed, as well as adjacent skills. Micro-credentials do two things for the learner that are important in the association professional learning context. First, they help recipients clearly understand what they've accomplished through the detailed information provided in the rich meta-data embedded in the micro-credential. This digital artifact is far more desirable and valuable than a one-dimensional paper certificate. Second, they illuminate learning pathways. Because micro-credentials support rich information sharing, they offer language with which to discuss the learning accomplishment with employers and peers alike. This puts the onus on associations to develop learning pathways for our learners and help them to become more savvy in how they leverage skills they've gained through digital marketplaces, like LinkedIn. Not only do we need to carefully detail the skills they've acquired, but support them in leveraging those skills and experiences. Many professionals, even seasoned ones, need to be supported in developing their professional profiles in a way that effectively addresses job market needs and maximizes the value their earned credentials offer.

Micro-credentials are therefore a convenient, flexible, desirable option for associations and learners to support and participate in learning pathways, while also communicating their professional growth to a variety of audiences. Associations are in a unique place to support learning by refining and developing the value proposition in learning experiences. In higher education formal learning experiences, you learn from a subject matter expert, but in the association space, we're connecting professionals directly to who they want to be—their future professional selves. We're supporting them in getting to the next level of their career. Doing that means participating in formal learning, but also in networking, mentoring, and other engagement opportunities. It's really a unique value proposition associations offer and micro-credentials can be leveraged to support that value.

FROM THE CHAT

“Associations have the credibility to certify competency - they are ripe to disrupt certain aspects of traditional higher education.”

- Tristan Jordan -

“I believe we need to start educating individuals earlier on careers. Someone starts as an accounting major way before they know what careers are available in accounting. I am actually working on this to a small degree. I am working on compiling a list of students from across the country that I will survey for industries they want information/content on and work with leading associations to provide that information and content.”

- Jon Bassford -

“Associations are uniquely positioned to be the main ed source. We just have to have the products people will buy and the marketing so they know we have them.”

- Carolyn B. Thompson -

006

HOW TO RESUSCITATE YOUR EDUCATION



By Lynn Mortilla-Rocap, CAE, CMP

It's no secret that traditional lecture-style educational sessions are no longer the most effective way to educate. But how do you overhaul outdated learning techniques for interactive and engaging sessions, especially when you're working on a budget?

It starts with lots of pre-planning. Your conference teams, committees, speakers and anybody else who is working on your conference or meetings need to understand that you want to revolutionize the way you're doing things and shake things up. This means **you need to give very clear instructions** to those you're working with, as well as clear instructions on any call for papers that you might have. Adoption of new ways of doing things is never easy, so work to let your words paint a picture of what you are aiming to create. Hone in on how learning happens and list some innovative education techniques to invite presenters to select from for their format.

You need to **know your audience and design learning that enhances specific career stages and learning needs**. Novice attendees, for example, are looking for foundational education with a focus on the nuts and bolts. This format may benefit from more structure, with less concentration on participation. Meanwhile, participants in the prime of their career seek applied learning and keys for success in their professional development. The approach for this segment should therefore be highly interactive and extremely informative. For the sage, seasoned professionals, you need to offer highly technical and very detailed learning tracks that bring cutting-edge information and maximum immersion.

If you find that your meetings are still flatlining and **you need to really breathe life into your education, I have three CPR resuscitation tips for you.**

1. COMMIT TO CONVERSATION

Energize learning by highlighting experiences and inviting content and conversations that engage and create high-level interaction.

2. PITCH THE POWERPOINT

Bullet points and text do very little to invite engagement and conversation.

3. REINVENT, REVOLUTIONIZE AND REDESIGN

There is always room for improvement in your learning tracks and learning forms, but there is especially need for change when you see that they are not working. Think about multiple modes of designs for learning such as laser focused Ted Talks, ignite sessions or deep dives. Storytelling, the use of case studies, and roundtable discussions that create modern day think tanks invite participation and encourage peer learning. Don't be afraid to pre-poll attendees to solicit their input.

Purposeful planning combined with imagination and creativity can certainly help you breathe life back into your meetings and educational sessions.

07

FURTHER RESOURCES



During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about education in the association industry. We've compiled them into a list here.

- [eBook](#): A Guide To Successfully Designing Engaging Learning
- [eBook](#): Tradeshow (R)evolution - 50 Attendance and Revenue Growth Strategies
- [Report](#): Projections of Jobs and Education Requirements Through 2018
- [Article](#): The TIME/Carnegie survey shows the American public and senior administrators at colleges and universities are divided over how to fix higher education
- [Article](#): The Four Career Competencies Employers Value Most
- [Custom Training Events](#): Zappos Insights helps companies evaluate their values and implement changes to make the workplace a better place for everyone.



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