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TOP INSIGHTS FROM THE ASAE TECHNOLOGY COUNCIL

A Collection of Insights from
SURGE Co-Creation



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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, *Top Insights from the ASAE Technology Council*. 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





Anita Joshi

Director of Technology, National Investor Relations Institute

Anita has been involved in key leadership roles in the technology field for many years. She is currently the Director of Technology at the National Investor Relations Institute (NIRI). Anita is responsible for and manages all aspects of the association's IT architecture and day-to-day operations. She is involved in many projects including the association's mission-critical events, and its main internal, member and public-facing applications. She operates at a strategic level executing in a tactical way to ensure that strategy is implemented successfully.

Previously, she worked as Senior Director of Information Services for the American Subcontractors Association (ASA) for almost 11 years. She was responsible for managing all IT as well as the operational activities of the organization. She designed computer networks, implemented financial and other mission-critical applications including Association Management Systems (AMS) for the national organization and chapters. She oversaw departmental staff as well as finance and office administration. She has written many technology related policies.

Before joining ASA, she served as Information Systems Technician for the American College of Health Care Administrators.

Anita is a strategic professional with a career reflecting solid leadership qualifications. Anita received her Master's degree in Computer Information Systems from Strayer University in Washington D.C. She currently serves on ASAE's Technology Council.





Katherine Matthews

Business Intelligence Analyst, National Council of Architectural Registration Boards

Katherine Matthews is a Business Intelligence Analyst for the National Council of Architectural Registration Boards and a passionate data evangelist. In her work for NCARB, she helps the team to find and leverage insights in their data while supporting a self-service approach to analytics. Katherine is also a volunteer leader for two area user groups and is currently serving as Vice-Chair on ASAE's Technology Section Council.





Reggie Henry

*Chief Information and Engagement Officer,
ASAE*

Reggie Henry joined ASAE in November of 1994. His responsibilities are to implement “exemplary” systems at ASAE that can serve as a model to the rest of the association community and to “ratchet-up” the use and understanding of technology among ASAE members. He has been working with and/or for non-profit organizations since 1985.

Mr. Henry speaks regularly on technology and strategy issues. Some of his most recent speaking engagements include the 2017 Abila User’s Conference, 2017 Association Executives of North Carolina Spring Conference, 2017 AMC Regional Meeting, 2016 ASAE Technology Conference, 2016 CESSE Winter CEO Meeting, the 2014 Union of International Associations Roundtable in Dublin, Ireland. In 2009 he was invited by the Secretary of Smithsonian to participate in Smithsonian 2.0, a Gathering to Re-Imagine the Smithsonian in the Digital Age. Reggie was recently named one of the top 40 CIOs in DC-MD-VA area.

Mr. Henry holds a B.S. in Economics and Computer Science from Georgetown University. Mr. Henry serves on the Curriculum Committee and faculty of the Institute for Organization Management (U.S. Chamber of Commerce) and the Board of Directors of Educause, a nonprofit association and the foremost community of IT leaders and professionals committed to advancing higher education. He enjoys cooking, drawing, pottery and golf.





Ron Moen

VP & CIO, American College of Chest Physicians

As the CIO at CHEST, Ron's mission is to engage new ideas, collaborative approaches, and creative solutions for the benefit of association staff, volunteer leaders, and the engaged community. Ron fosters a culture where individual contributors connect on a collaborative team to shape culture, process, and outcomes.

Previously, he worked for Personify Inc., a leader in association membership management software, where he was Senior Director, Business Development. He also has 15 years of experience at the Association Management Center (AMC), where he supported AMC's full-service headquarters as Director of Information Services, directing the technology services; outsourcing business; and helping professional, health-care, and trade associations meet their information systems needs.



02

GUEST SPEAKERS





Rhea Steele

Chief Operating Officer, DECA, Inc.

Rhea has over 13 years of experience in the non-profit, education, museum, and association fields which has resulted in deep expertise in governance, strategic planning, evaluation, policy development, high-performance teams, culture change, facilitation, and operations. As an action-oriented leader, she enables her team at DECA, Inc. to work across the organization to carry out mission-centric projects and stay on the lookout for opportunities to improve processes and policies.

Rhea is an engaged member of the American Society of Association Executives (ASAE), where she serves on the Technology Section Council. She is a Public Director of the National Architectural Accrediting Board where she serves on the Governance Committee, Finance and Audit Committee, and the Information Interface Work Group. She is a co-founder of the Association Women Technology Champions which provides networking and learning opportunities for women in the DC area. The Association Forum and USAE named her a Forty Under 40 award winner in 2016, she was honored in 2017 as Association TRENDS Young and Aspiring Association Professional, and in 2019 was honored by DCA Live as an Association Innovator.

Rhea received her B.A. and M.S. from the University of Colorado-Boulder (CU). She has presented and written about culture change, process improvement, strategic visioning, ethics, innovation, and the future of work.



03

WEIGHING THE RETURN ON NOT INVESTING

By Reggie Henry

A while ago, while keynoting a conference on using data and new technology, and there was one particular person in the audience who was full of questions. This person was asking about the Return on Investment (ROI) on this, that, and the other. At a certain point, I got off the stage, walked up to this attendee, and asked them what inaction will result in, **what is the return on not investing?** What if your association members think you're not forward thinking? What if that one new technology could be transformative for your organization? Without investing, what can you do to keep up with their everyday lives vis-à-vis technology?

There was satisfaction in witnessing how many people had an "ooh moment"! C-suite staff are no strangers to discussing investing, but it's less common to talk about inaction. How do we measure what happens when we don't invest? What's the price of missing out?

As far as technology goes, the shift in weighing the return on investing and the return on not investing is everything. When technology used to come and go, there was a beginning and an end. **Now, technological investments don't have finish lines, they are ongoing business investments.** Technology has exploded in the past 5-10 years and we're constantly catching up and creatively coming up with metrics for the non-stop innovations around us. Anything we focus on is constantly iterated until it may look the same but is completely new! For example, look at Apple products. iPod classics were discontinued in 2014, and five years later, there are over 2 million items available at the Apple App Store. With the runaway growth and success of iPhones, we have Apple Music, and the iPod is a default application in your phone now.

Now, how can you begin discussing the return on not investing in technological growth? How can you possibly risk not investing? **The idea is to replace failing with learning,** and approach any risky investment with that mindset.

I failed extremely well a while ago. Member accounts to Listserv were the top 2% or 3% of why people joined ASAE. I started thinking it was a bit old school, and that new platforms and software were emerging that offered so much more. I was excited and eager to move forward, but with Listserv being such a valued service, there was resistance from staff and members to replace it.

The association serves the members, and I needed to build a case for them to trust the vision of what would become [Collaborate](#). How can I engage the community in something they hadn't experienced before? To put an image to a virtual concept, we asked "What might an association town square look like? What's happening here? What interactions are going on?" With answers like debating, selling, and learning, it became clearer what I was hoping to build for the community. **The idea of an online association town square was something people could buy into, and the return on not investing was non-existent.**

Involving the community in this investment was paramount to its success. The concept was enthusiastically validated, and the much-needed execution iteration sold itself! Like in many cases, investing in the community isn't necessarily investing in a *thing*, but in the results *the thing will bring*.

That being said, the actual execution sucked so badly. During a board of directors meeting, I went straight to the president and said "Thanks for investing in the idea! Now let's get back to work."

On a related issue, this is why I love the Technology Fail Fest held at our Technology Conference every year. It's a group of risk takers who tried something new and failed, and now they can share what they tried, what they learned from its failure, and the steps to move forward! This is so much more than just celebrating failure for the enjoyment of storytelling, this is about institutionalizing failing it as a way of learning! **This is a conversation about how to get off the dime on something and move forward.**

People interact with technology every day, and every day, the expectations are raised. For an organization to fall behind is risky business. There used to be a 10-year gap between technology coming into its own and it being adopted. Now that gap is gone. The universe is shrinking and expectations have changed, **things we used to think were risky can no longer be put off.** Association professionals see the world evolving outside of their organization, then don't do what needs to be done. The return on not investing in technology is faint. It's time to face this reality, eliminate excuses, and find ways to deal with it!

FROM THE CHAT

“It’s not about being an on-demand service provider, but being an on-demand value provider, listening to how and what members value through their connections with their associations.”

- Rick Rutherford -

“I have a friend who always speaks to Siri in a very polite, formal tone because he wants the robots to know he is a nice person so that they spare him in the uprising”

- Katherine Matthews -

“My association is constantly coming up with new things, and recently has made pivotal changes. My pitch is always telling the board that our tech solutions need to be ready for us to tackle these new changes. That takes strategy and money.”

- Melissa Patterson -

“Don’t prejudge older stakeholders as being necessarily non-tech savvy. There actually is significant research that says otherwise.”

- Robert Rich -

04

**DATA: OF THE PEOPLE,
BY THE PEOPLE, FOR
THE PEOPLE**

By Katherine Matthews, CAE

Much of the general conversation around data is about how it can be used to shape or shift the subject's behavior. I would argue that we should be expending as much, if not more, effort in **interpreting the data and using it to shift and shape our behavior to better meet the needs of our members and customers.**

We're seeing an interesting co-evolution presently – consumers are becoming more comfortable with (or, perhaps, desensitized to) sharing their data with companies, but they are simultaneously expecting that we are doing something meaningful for them in exchange. I think this is perfectly fair! After all, if we aren't using this data, then why are we collecting it in the first place?

In my current role as Manager, Data & Analytics, for the National Council of Architectural Registration Boards, I am deeply motivated by our organization's strategic goals: Facilitate Licensure, Foster Collaboration, Maximize Value. In the previous iteration of our strategic plan, we included a goal to "centralize credential data". When we updated the plan and removed this goal, I was delighted because it demonstrated **a deeper understanding of the purpose of data** – not to collect it for collecting's sake, but to incorporate it into everything we do in order to better accomplish our goals. In support of this, we are very fortunate to have a Chief Information and *Innovation* Officer, which I like to think of as a "designated visionary" for NCARB. Our culture very much centers around finding ways to eliminate friction for our members, volunteers, and customers whenever possible.

One of the projects that I see incredible potential in is our "Licensing Manager" application. We're developing this web-based application for our boards to use to issue and manage licenses. And **data stewardship is at the core of the project** – we're integrating the tool with our in-house system of record to keep records in parity in both systems; we're migrating the board's data to a relational model that will be better suited to analytical uses; we're using industry-leading security and privacy practices so that these jurisdictions can confidently assure their licensees of the safety of their information. One of our primary goals with this product, and with all new tools we build and deploy, is to have the system be conversational instead of simply available. By that, I don't necessarily mean chatbots (though we'll certainly get to those!), but rather that the information is always at-the-ready so that questions can be answered and decisions can be made in the flow of a

meeting or conversation. We're **shifting the paradigm from asynchronous research to a collaboration between the business users and the relevant data**. My hypothesis is that making this shift will ultimately help demystify data – if we are consistently incorporating data as part of our day-to-day, then we won't think of data as a megalithic resource requiring special skills.

Internally, we're beginning a project to dig in deep on our helpdesk information. We'll be looking at shifting patterns in contact methods (less phone, more email) and any trends in the types of questions being asked. The critical piece of the project will be facilitating access to the information in a structured, accessible manner so that leadership can begin monitoring it continually instead of relying on periodic, large scale research projects. Of course, the other piece of the puzzle will be trying to solve or ameliorate any common pain points we find. (Perhaps this is where the chatbots will make their debut...)

For nerdy data evangelists like me, these are exciting times. I am encouraged by the growing community in the association space of people who are embracing their data and iteratively taking on new projects. We can start with **solving common challenges** faced by our members and customers and build towards tackling challenges for the industries they represent. In the data lake, a rising tide lifts all boats.

FROM THE CHAT

“Might be interesting to know ‘why’ people are resistant to using an app. Maybe there isn’t as much value in them (as currently constructed) as you think.”

- Robert Rich -

“At my association, we put everything on the app, our app downloads over 90%. We are now almost green using the conference app.”

- Anita Joshi -

“A big theme here at SURGE is small wins lead to big wins.”

- Lisa Campo -

05

HOW TO SUCCESSFULLY ONBOARD A NEW LEADER IN YOUR ORGANIZATION

By Rhea M. Steele, CAE

As we reflect on organizational culture, we recognize the importance of onboarding in supporting new employees to understand, engage, and reinforce our desired culture. The onboarding of new senior leaders is similarly critical since these individuals have a greater sphere of influence within the organization and can have a significant impact on culture (good or bad) in a very short time.

While onboarding is often conducted over months, new leaders need intensive, short-term onboarding in four areas to be truly successful.

UNDERSTANDING THE IMPLICIT AND EXPLICIT CULTURAL AND COLLABORATION NORMS

New leaders need an understanding of the implicit and explicit cultural and collaboration norms of **both the organization as a whole and the leadership team as a unit**. High-performing leadership teams regularly talk about the culture of both their team and the organization and take specific behavioral actions to ensure both are fine-tuned for organizational success. **These conversations should be reopened** and become more deliberate when onboarding a new member to ensure the shift in dynamics ensuing from the addition of a new personality does not negatively impact culture.

UNDERSTANDING HOW THE LEADERSHIP TEAM ADDRESSES AND MANAGES CONFLICT

All leadership teams experience conflict, it is part of the healthy dialogue and debate allowing the best decisions to be made for the organization. Everything from how discussions are structured to how emotions/individuals are handled when discussions get heated should be on the table. The best time for a new leader to understand how conflict is managed **is before one arises**. This will allow her/him to prepare for the dialogue and resolution as it plays out among the team and better manage her/his emotions during the discussion.

UNDERSTANDING THE INTERSECTION OF THE BOARD OF DIRECTORS AND THE LEADERSHIP TEAM

Knowing whether the board is operational or strategic; driven by the strategic plan or special projects; and the level of detail they are seeking in preparation for discussions (among other things) are all important for the new leader to understand. It is also critical for all members of the leadership team to have **a common understanding** of the level of engagement they can/should have with the Board and know how to communicate information from individual Board interactions back to the full team so everyone stays in-the-loop.

UNDERSTANDING THE INTERNAL POLITICS AND RELATIONSHIPS OF THE ORGANIZATION

Whether the relationships are member-member, member-staff, or staff-staff, it is critical for a new leadership team member to get up-to-speed quickly **on the interpersonal dynamics at play in the organization**. Often, current leaders are reticent to share relational information because they want to avoid creating bias for the new team member. However, unknowingly stepping into a fraught situation can have a negative impact on both the new leader and the organization. Proactively sharing relational information will allow the new leader to more deftly maneuver and set him/her up for greater success.

Finally, all members of the leadership team have **the responsibility to create an inclusive environment for the new leader** - inviting him/her into conversations, asking for perspectives, and helping him/her find and work within the right “lane” in the organization. The new leader “doesn’t know what he/she doesn’t know.” The more information other members of the team can share, the more quickly the new team member will be able to make a significant positive impact on the organization.

06

FURTHER RESOURCES



During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources around topics brought up during the session. We've compiled them into a list here.

- [Article](#): Facing Your Cybersecurity Fears
- [eBook](#): Put Your Data to Work: 52 Tips and Techniques for Effectively Managing Your Database
- [Study Report](#): Measuring Performance: Purpose, Process, and Practice
- [Article](#): Meeting Members' Technology Needs
- [Report](#): Tech Success for Associations: Balancing IT Maturity, Readiness, and Expectations for a Satisfying, Sustainable Future
- [Article](#): How Data Will Predict the Future
- [Article](#): Is Your Association Ready to Support Artificial Intelligence?
- [Guide](#): ASAE ForesightWorks Data and Technology Action Set
- [Engage](#) is a VR education and corporate training platform. It enables educators and companies to host classes, meetings, private lessons and presentations with people from across the world in a safe, virtual, multi-user environment.



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