

MISSION CRITICAL: ADVANCE YOUR INDUSTRY'S WORKFORCE THROUGH REAL LEARNING

A COLLECTION OF INSIGHTS
FROM **SURGE** OPTIMISM



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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 Optimism 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 delves into the session, *Mission Critical: Advance Your Industry's Workforce Through Real Learning*. 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 Optimism** [event page](#) to watch all the sessions for free, at your leisure

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01

FEATURED SPEAKERS



Lowell Aplebaum CAE

CEO & Strategy Catalyst, Vista Cova

Lowell Aplebaum, CAE 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.





Tracy King, MA, CAE
**CEO and Chief Learning
Strategist, InspirEd**

As Chief Learning Strategist & CEO of InspirEd, Tracy leverages her more than 20 years in the education industry consulting with organizations on education strategy and learning design. She advises associations on how to grow a reliably profitable and sustainable CE business that transforms learners. Tracy specializes in the intersection of learning science and technology. She's a thought leader, invited speaker, and the author of *_Competitive Advantage_*. For more information please visit her online at www.inspired-ed.com or www.tracy-king.com





Jess Halverson Bowyer
Strategist, CPA Center of Excellence®, powered by the Indiana CPA Society

As strategist for the CPA Center of Excellence®, I focus on innovations in the way we do professional development, centered on competency-based lifelong learning for professionals.

During my time at the CPA Center of Excellence, I've designed competency-based online learning (a first for the CPA profession), developed partnerships with businesses and academia, done strategic planning, led collaboration projects, participated in the rulemaking process, spoken publicly and written on the future of work, learning and associations, created websites and user experiences, and met so many interesting people.

I believe that lifelong learning is essential, and that everyone should have the opportunity to pursue learning that fits their goals and needs.





Carolyn Thompson
President, Training Systems INC

Carolyn B. Thompson is an experienced training designer, facilitator, event planner and HR consultant for TRAINING SYSTEMS, INC., a customized performance improvement and HR consulting company dedicated to helping small and medium sized organizations enhance their ability to recruit, inspire and retain quality employees and improve performance through training. TRAINING SYSTEMS, INC. also provides training design and delivery services to training companies, the training departments of large companies and trade & professional associations. Carolyn is responsible for marketing and helping clients determine the best methods for achieving the performance they need.

Carolyn's training design and facilitation style are highly interactive and include many hands-on methods and materials designed for learning that goes beyond the training session. She has facilitated training throughout the country for trade/professional associations and small, medium and large companies, both for profit and non-profit. Over the past twenty years she has trained thousands of people from students to entry level staff to managers at all levels.



02

THE MANY PATHS OF LEARNING TOWARDS WORKFORCE DEVELOPMENT

Workforce development in associations is a monumental task to be tackled piece by piece.

BY LOWELL APLEBAUM

I experienced an “aha!” moment when I attended one of my first association conferences. I had been a casual Twitter user - a lurker mainly who would scan streams for interesting insights. At this conference, my approach shifted, as instead of taking notes by hand, which I rarely went back to, I started tweeting about what I was learning at the conference. During sessions, I had people responding in real time. I was learning from people sitting around me, and even those not in the same room. Afterwards, I found that the process of writing tweets made me remember what I learned long after the session was over. Social media became not just a communications tool but a learning tool for me. This experience using Twitter was a lesson in how we use the tools around us to better imprint, understand and retain what we learn - and it is one I continue to employ today.

I open with this because learning theory teaches us that **one of the best ways to engage a learner is through narrative and storytelling**, rather than questions and answers. Now that I have your attention, we can zoom out on the larger questions about learning and workforce development that are at stake for all of our organizations. Aside from social media, what are the other learning paths and tools we can pursue in the hopes of building a stronger workforce, stronger organizations and stronger people?

A main challenge when discussing learning is its sheer magnitude. As an overarching term, it's the means by which we prepare for the future by individually and collectively becoming better today. Under a magnifying glass, it's a world of unique experiences and approaches.

For many of our organizations, learning has transformed from the isolated topics covered at conferences into partnering within and supporting an industry by

actively developing a workforce. Developing a workforce is not something that happens overnight. **Aiming for incremental improvements and milestones of success can help us understand that it is a journey** and that we are all on the right path.

For example, one milestone might be the retention of star members learners within the organization. There is opportunity to take those students who have a positive experience with an organization's learning programs and bring them back as ambassadors to guide new learners. They might even become teachers. **Are you reincorporating past and present learners into the process as teachers and storytellers?** Learning doesn't have to come from the inside of the organization out. It can be an ever-growing network of teachers, mentors and learners guiding each other through the resources offered by the organization. One member might wear many hats over the lifespan of their membership.

This approach is reflective of the changes we are seeing in the professional landscape today. The traditional pathways of any career are being shaken up. A professional used to belong to one company for 50 years. **Nowadays there's a lot more fluidity.** People might go from being part of an industry, to servicing the same industry, to being a consultant, to circling back into the industry, all in one career. People can make multiple career changes over the course of their professional life. This complicates, but also opens up possibilities, for developing a workforce fit for the 21st century.

Developing a workforce through learning is a task monumental in its scope. Learning has the potential to be a real core reason why our organizations will exist and succeed in the future. It will become central as we enter times of disruption where there is greater competition in traditional lines of organizational revenue, like networking. **Learning can be at the core of how we improve industries through our members, and ultimately improve society.**

From the Chat - Attendee Recommended Podcasts

On the work side of the work-life integration approach.

[Tagoras - Leading Learning Podcast](#): Tips, insights, and perspectives to help you maximize the reach, revenue, and impact of your continuing education and professional development business.

[Bernard Bull's Moonshot Edu](#): Exploring the frontiers and futures in education.

[Call to Action](#): This digital marketing podcast breaks down both the art and science of our craft, from strategy and planning to execution, measurement and optimization.

[IdeaCast](#): A weekly podcast featuring the leaders in business and management.

[Design Matters](#): A podcast about design and an inquiry into the broader world of creative culture through wide-ranging conversations.

[Distillations](#): A podcast where science and the humanities overlap, it's about science in society, or about how things came to be.

[Rationally Speaking](#): Explore the borderlands between reason and nonsense, likely and unlikely, science and pseudoscience.

03

**ARE YOUR LEARNING
PROGRAMS TRANS-
FORMATIONAL?**

To strengthen your workforce pipeline, develop mastery through education.

BY TRACY KING

Learning is transformational: that means change should happen as a result of it. Is the learning you are providing engaging brains to change, or is it learning by name only? Associations have so much power to strengthen the workforce pipelines of their industries and develop mastery for individuals by better leveraging their educational portfolio to offer transformation. Let's look at two ways to jumpstart this into reality.

Listening with intention

The foundation of education strategy is knowing how to position our programs within our market. We need to understand how deep that market is, where the shifts are happening, and what futurists are saying. The other part is using existing channels to listen to what's happening around us.

Fashion a listening campaign. Consider: How are we using evaluations? How are we using your forums? How are we using conversations at conferences and on social media? Can they become part of a listening campaign where we formally pick up the seeds of organic exchanges to inform our content priorities? We can listen for the pain points, the solutions members are seeking and the questions members are asking. This can lead to a formal research approach, alongside internally noticing trends and gathering intelligence, by listening to the channels of information that are already in place.

By listening with intention, **we are poised to assess the needs of our association based on disruptions and shifts in play.** If there's anything surprising in these observations, we can revisit content priorities for the coming year.

Developing mastery: go deeper, not just broader

With that in mind, if we're always looking for brand new topics in our listening tour, we are never going to get to the point where we're able to build programming to develop mastery. We're just going to be throwing information at members on a broad range of subject matter that doesn't necessarily link up or lead to deepened understanding and practice. **How much of our programming is information-based and topic-related, and how much of it is skill and knowledge development that strives for mastery?**

When we think broader than what our "average" members need now, we can start to have deeper conversations around the workforce pipeline. How are we partnering with other organizations to ensure there are qualified candidates for employers to connect with? How are we helping to advance a professional through their career maturity? What does it look like to continue to funnel all of their learnings into moving this workforce forward? Shifting to a broader perspective opens up conversations that are critical to our success in positioning ourselves powerfully as the source of ongoing continuing education throughout the life of a career.

Developing the pipeline does not necessarily mean we need to offer more events. Learning is not an event. Sure, you can learn at an event. But developing mastery requires developing skill, deepening knowledge, and advancing as part of an ongoing process. As organizations, we can build these pathways through our entire portfolio of learning in order to facilitate that growth. We have in person experiences that could be connected to webinar experiences, that could lead to e-learning experiences, that could lead to a mentoring experience. Learning pathways can achieve greater outcomes than just providing information about a topic. We can do this by leveraging what we already offer.

In my new book [*Competitive Advantage*](#), I recommend an easy way to **pilot learning pathways begins by discovering natural connections you can make between and among existing programs**. First, take all of your programs for the upcoming year and plot them out on a calendar. Now consider where your content priorities for the coming year will be addressed in your programs already in development. For example, at a conference maybe you're talking about ethics in a Forum. You then realize you have an article about ethics scheduled and a webinar in development also. Each of these touchpoints can be connected and coordinated to achieve a larger outcome driving the ethics conversation deeper and challenging improved practice. Often, powerful synchronicities between programs within the portfolio pop simply by whiteboarding. And once you see how powerful learning pathways are for your constituents, you'll want to build them with intention and measure the incredible transformation they afford.

The new value proposition in the CE marketplace is transformation. Professionals invest in programs that result in a change they want to see - to do or be something new or better. But are we offering transformation or are we primarily offering information? If participants leave our conference sessions and nothing changes, we failed. **To advance our workforces, we must embrace transformational learning.**

From the Chat - Views on Listening

What you can learn from taking feedback seriously.

"Great notes on listening. I just moderated a forum this week on annual partnerships. It started as a discussion at an education forum back in the spring. So many members were interested in learning more that we created another event. Surveys are great, but if you observe the learning sessions you have, you'll find the side topics that get people excited. Turn those into your next event."

— Melissa Clark —

"LMS's do give statistics, a type of listening, but you need that with feedback. It's incomplete to listen to feedback ONLY and not the statistics with it."

— Emery Wolfe —

04

CHANGE ONE THING

What's the trick to the huge task of transforming association learning?

BY JESS HALVERSON BOWYER

One of the hardest things about changing learning is how BIG it all seems. You may know something needs to change, but not what. Or maybe you know what, but not how.

Let's start by addressing why we need to change: our members. At the CPA Center of Excellence® and Indiana CPA Society, these members consist of nearly 8,000 CPAs and accounting professionals.

Learning needs to change for our members because their world is changing. Advances in technology like robotic process automation, blockchain and big data are set to revolutionize how CPAs work. Clients are changing — a small CPA firm built around local clients now has access to a global marketplace with remote work options. Hiring CPAs is increasingly competitive, and due to these changes brought on by technology and globalization, the non-technical skills like critical and strategic thinking, communication skills and an entrepreneurial mindset are crucial. These types of changes are affecting many other professions as well.

Like our members, we as associations also face an increasingly competitive marketplace. LinkedIn is expanding its online networking and resources. Learning startups like Degreed and online course providers create competition from an entirely new space. Vendors specifically targeting our different audiences, especially for licensed professions where continuing education is a requirement, have commoditized online learning. It's time for us to quickly respond in order to remain essential to professionals. **A learning portfolio of a bunch of in-person seminars and some conferences isn't going to cut it anymore.**

Luckily, we are uniquely positioned to do this. We have the connections between the educators and the members. We often can be more agile than larger organizations or government regulators. Best yet, we have access — **if we want to know more about what our audience needs, we can just ask them.**

The challenge is that responding to this huge amount of change is going to take a different type of thinking than to keep doing what we did well before. There are two parts to this change: a strong vision (why) and diligent implementation (how).

Our vision at the CPA Center of Excellence® and Indiana CPA Society is to change the CPA profession and pipeline to a competency-based model for learning. Currently, hours-based learning is the standard. Working towards this vision is complex — it has required lengthy strategic planning, hours and hours of advocacy work, patience, product development, organizational change and, often, trying something to see if it sticks (and finding out it doesn't).

On good days, you get to directly see how what you are working towards will change someone's career or business. A student tells you they got the job because of something they learned about from your program. A member excitedly shows you their firm's new career development program for their staff and talks about how it helps their retention. You see someone light up when they "get it." Dedicated volunteers sincerely thank you. Involved members spread the word.

On bad days, the implementation process can be frustrating. If I told you everything we've tried and failed at to get a third of the way to our goal, you would not want to start. But here's the thing: with the type of change demanded by today's changing environment to create value for our members AND to keep associations successful for the long run, not changing is not an option. So what is an overworked association professional to do?

Start with one thing. Start with one conversation. Accept the fact that you will not have all of the answers or a clear roadmap when you start. **Have faith the answers will become apparent after you start working towards your goal.** The most powerful thing I've learned from this process is the idea of incremental change. I'm a person who loves big ideas and can talk with you for hours about what the future should be or could be. I can see how the pieces could all fit together to make our vision a reality. And I'd really like that to happen... yesterday. Learning to be comfortable with changing one small thing at a time has been challenging for me accept.

Now that it has been a few years and I can see the results of our initial steps towards change, I'm enthralled with the idea implementation breakdown: **what the small steps are that we can implement that will create the snowball effect.** It's only by changing many small things that we will get to large change. You'll need to give yourself permission to start, and possibly fail a few times, and not be overwhelmed by the magnitude of changing learning.

Everything is already changing in our environment, and we are situated in the most advantageous position to help our members. The competition doesn't know them like we do.

All we have to do is start.

From the Chat - Attendee Recommended Podcasts

On the life side of the work-life integration approach.

[Stuff You Should Know](#): A platform to educate the public about common things and how they work.

[Stuff You Missed In History Class](#): Fairly self-explanatory.

[Still Processing](#): A set of discussions about the big cultural events of the day, from society and art to dating and work.

[Side Hustle School](#): Create a new source of income without quitting your job.

[Dan Carlin - Hardcore History](#): The focus of each episode varies widely but they are generally centered on specific historical events and are discussed in a “theater of the mind” style.

[Gastropod](#): Gastropod looks at the hidden history and surprising science behind different food and/or farming-related topics.

[The Skeptics Guide to the Universe](#): A podcast dedicated to promoting critical thinking, reason, and the public understanding of science through online and other media.

[Barbell Shrugged](#): Shrugged Collective is a network of fitness, health and performance shows that help people achieve their physical and mental health goals.

[Myths and Legends](#): This show brings you folklore that has shaped our world, some with surprising origins.

[I Will Teach You a Language](#): You'll get ongoing motivation on your language learning journey and tips to become a better learner.

[Coffee Break Languages](#): Learn a language in your Coffee Break.

[America's Test Kitchen](#): Proof is a new podcast from America's Test Kitchen that goes beyond recipes and cooking to solve food mysteries big and small.

[President's Inbox](#): Talk with experts about the foreign policy challenges facing President Donald J. Trump.

[FiveThirtyEight](#): The FiveThirtyEight team cover the latest in politics, tracking the issues and “game-changers” every week.

05

HOW TO BE A NOTICER: ORIENTING LEARNING TOWARDS THE FUTURE

Inform your education programs with this unique strategy.

BY CAROLYN THOMPSON

Is the learning you offer future focused? If you start changing your learning programs once you discover a new direction or need in your industry, it's likely too late. It takes months or years to retool things like learning design, pathways and marketing. We need to find out what's going to happen in our industry next year, in five years, and in ten years, then align the learning. We have to service not just what has been, but what is going to be.

How do organizations make the practice of thinking about the future a part of their day-to-day? You know the saying: "if everyone's responsible for it then no one is." This is why so many of our organizations are falling behind.

A Two-Pronged Approach

Approach the ongoing, essential task of strategically noticing precursors to the industry's future from two fronts: **everyone** and **someone**. Make sure everyone knows how to be a "noticer". At the same time have someone, no matter their title, designated to be a noticer.

Our customized training company is many times hired because we work with a lot of different industries, business models, and skill needs. We have to pay attention to everything around us to be prepared for anything. It's as much a passion as a skill. **We are energized by gathering and analyzing the huge amount of information that comes our way.** We practice strategic noticing and so can you.

Locate Your Noticers

These are some attributes of strategic noticers:

- think like you're new to your industry
- be actively on the lookout for ways to update your own knowledge and skills
- take in information (some call it trivia) by osmosis
- read blogs, newspapers, magazines and books and listen to podcasts about your industry and beyond
- ask questions

Everyone should have the noticer role listed in their job description, be assessed for these attributes, have learning available to fill in gaps in those attributes, and be evaluated in their performance appraisal for doing these actions.

The designated someone should naturally possess these attributes. Maybe it's not you. Maybe it's not the person in the Learning & Development or Education departments. Some organizations have futurists, the ultimate noticers. Your organization may not be able support a dedicated position for a futurist or noticer, but if you have a staff member or volunteer who is naturally a noticer, they'll be doing it anyway, no matter what else is on their to-do list. The strategic part comes in when we harness the information they take in.

Guide Your Strategic Noticing

Here are some ways to source the information you want to notice:

- ask your general membership what you should be keeping your eyes open for
- ask former members why they left

- ask the customers of your members questions about the industry
- ask volunteer leaders what's changing in the industry and association
- create and read learner evaluations
- read what people are saying in the industry and association forums, online communities, and listservs
- read and respond to association and industry social media
- listen to what futurists in the industry are saying

Make a Plan

Before you start your strategic listening campaign, plan what you're trying to pick up. **What seeds, pain points, and solutions are people looking for?** What kind of questions are they asking?

You also need to plan an output method to make it easy for people to data dump. [Slack](#) or a spreadsheet template lets everyone use the same category heads, making for easy comparisons.

What's Next?

The amount of information around us is staggering once you start to notice it. And it doesn't stop there. You have to recognize patterns and identify highlights through all the noise of the data coming in.

The patterns you discover are desperately needed by every part of your association. Get people talking about the trends and the highlights. Intentionally listen to those conversations with the channels you already have in place. Hear from multiple voices. **And then get busy creating the learning experiences and learning pathways that are going to be needed for tomorrow.**

Author's Note: This strategy is only one end of the spectrum for marking trends. Full-on market research is just as important to understanding your landscape. **Invest in that research every three to five years, depending on how much disruption is in your industry.**

From the Chat - Thoughts on the Planning Required for Educating.

Gone are the days of distributing information in one format for a indiscriminate audience.

"My learning "aha" was when I first discovered design thinking and it's application to conferences, that if we start with the end in mind and connect all our planning and learning design to the needs of our audience then you create the "right" learning environment...not just one that is flashy and fun."

— Molly Marsh —

"All of this diversity in delivery methods is amazing and must require a tremendous amount of tracking to make sure information gets updated across all of these paths and channels."

— Tim Parsons —

06

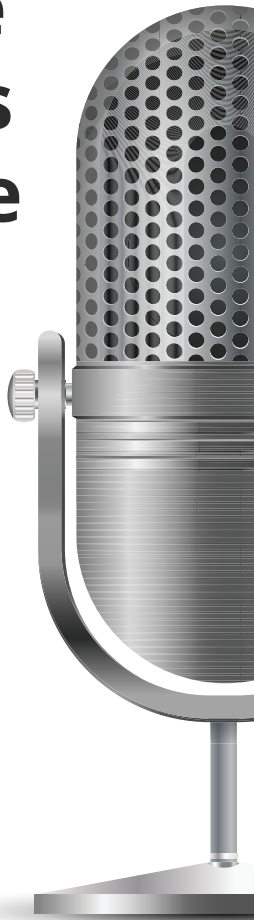
FURTHER RESOURCES

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

- [Book](#): Competitive Advantage: Create Continuing Education That Is Profitable, Sustainable, and Impactful by Tracy King CAE
- [Presentation](#): Cracking the Credit Hour
- [Program](#): The INCPAS Scholars program is a career awareness and mentoring program for minority high school students
- [Book](#): Make It Stick: The Science of Successful Learning by Peter C. Brown, Henry L. Roediger III, Mark A. McDaniel
- [Resource](#): Job search engine to determine probability of your job being automated.



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