

GETTING CLEAR ABOUT CULTURE CHANGE

A COLLECTION OF INSIGHTS
FROM SURGE SPRING



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INTRODUCTION



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

SURGE Spring 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 ideas. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook delves into the session, *Getting Clear About Culture Change*. It includes themes from the speakers' conversation, contributions from attendees, links to further resources, and more.

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

TABLE OF CONTENTS

- 01** FEATURED SPEAKERS
- 02** HOW TO LAY THE FOUNDATION FOR CULTURE CHANGE
- 03** ASSOCIATION CULTURE: WHAT NOT TO DO
- 04** CAN ONE TEAM CHANGE A WORKPLACE CULTURE?
- 05** AGAINST BRAINSTORMING: THE DESIGN SPRINT SOLUTION
- 06** FURTHER RESOURCES



01

FEATURED SPEAKERS



Michael Grant
Director of Marketing & Communications, Canadian Society for Medical Laboratory Science

Michael is a creative communicator who has a penchant for wild ideas. He has spent twelve years working in marketing and communications for the not-for-profit sector, moving over to the association world in 2010. In his current role, Michael heads up a fearless team of creative professionals who are responsible for CSMLS's web presence, social media, advocacy, publications, and member recruitment & retention campaigns. Always looking to be innovative with small budgets, Michael's work has garnered national and international awards for marketing and communications excellence.





Anne Nevel

**Senior Director of Industry
Education, Healthcare
Distribution Alliance**

As HDA's Senior Director of Industry Education, **Anne Nevel** is responsible for the development and oversight of the strategy for industry education by developing content and supporting information-sharing for HDA's conferences, seminars and other programming. Additionally, Anne directs the planning, organization and coordination of industry relations committees and working groups. Prior to joining the HDA staff in November 2016, Anne provided educational program oversight for various healthcare and trade associations to including the American Gastroenterological Association and the Helicopter Association International. She graduated from Florida State University with a degree in Criminology.





Jamie Notter

**Consultant, Speaker & Author,
Human Workplaces**

Jamie is an author and culture consultant at Human Workplaces who uses culture analytics and customized consulting to drive growth, innovation, and engagement for organizations around the world. He brings 25 years of experience in conflict resolution, generational differences, and culture change to his work with leaders leveraging the power of culture. Author of two books (When Millennials Take Over, and Humanize), Jamie has a Master's in conflict resolution from George Mason and a certificate in OD from Georgetown, where he serves as adjunct faculty.





Greg Roth

Speaker, Trainer & Creative Consultant, The Idea Enthusiast

Greg is a speaker, trainer, and creative consultant. He likes to talk about ideas and marvel over how they happen. Greg loves to work with folks who want to get better at their lifestyle, not just want a handful of hacks. People hire Greg to speak to and entertain an audience on different subjects, train or facilitate a private group, one-on-one coaching, or as a creative individual who acts as a staff “wildcard.”



02

**HOW TO LAY
THE FOUNDATION
FOR CULTURE
CHANGE**

There are key steps you can take to prepare for culture change.

BY JAMIE NOTTER

Culture change is not rocket science. Conventional wisdom may say that it is hard, that it is undefinable, or that it takes many years to accomplish, but I disagree. People participate in culture change all the time--they just don't realize that's what they're doing.

My business partner, Maddie Grant, and I have been doing change work in side organizations for twenty years. Initially, we were each being called into organizations to solve specific business problems, but we quickly learned that our real job was shifting culture. I have learned over time that there are some key building blocks that must be laid down before moving forward with culture change. **Pay attention to these steps, and you'll pave the way to success.**

Create a Culture Team

Culture exists, of course, in every corner of your organization, but you can't have EVERYONE doing all the work related to culture change at the same time. So your best bet is to create an internal team that will drive the effort. **I recommend curating a group with as much horizontal and vertical diversity as possible.** Having team members from across the board allows the culture conversation to spread into all corners of the organization. And having multiple levels in the room means that each layer of the hierarchy is able to see the culture issues from a different perspective, which is key.

That being said, make sure the culture team has a strong connection to the most senior level, and specifically the CEO. As a good CEO friend of mine has said, the CEO can't single-handedly drive culture, but they can kill it in a heartbeat. Make sure the CEO is aware of your work and has the opportunity to shape it along the way.

Define Your Existing Culture

When you start moving down the road of culture work, you're going to be tempted to immediately dive into your vision of an ideal culture. **Resist that temptation, and instead focus intently on what your culture is, here and now. Before you can change, you have to get crystal clear on "what is."**

I worked with a client that focused heavily on innovation. They were great at having conversations about creativity and future thinking and innovative ideas, and they wanted to focus on those components of their culture. When we got a little bit further into the weeds of innovation, however, they realized that while they talked a good game at the concept level, they weren't very strong when it came to the action side of innovation--things like experimentation, risk-taking, and beta-testing.

It was crucial for them to look at the bigger picture of their existing culture and locate the missing pieces in their quest for innovation. They had to step back from ideas and into process before moving forward.

Success Drivers

And when the time comes to talk about your ideal culture, you **MUST** connect it to your success drivers. What is your superpower? What variable has a disproportionate effect on your organizational outcomes? What makes a difference to the organization and your members? Success drivers are the factors that lay the foundation for your success. **It is imperative that the culture you create is completely aligned with what makes you successful.**

I once had a client that believed wholeheartedly in inclusion. The association was formed for the purpose of including those who were otherwise left out of their industry, so inclusivity was at the heart of their work. But when they were designing their ideal culture, they realized that their emphasis on inclusion was actually slowing down their decision-making processes. Their members wanted them to be nimble and ahead of the curve, but including every voice in decision-making processes was getting in the way. Their success driver was figuring out how to hold onto their inclusive values while moving faster as an organization.

In the end, they realized they needed to radically change their approach to project management. They are now rigorous in defining exactly who is responsible for decision making, and they have no problem excluding others from that process if needed. And that is how culture change works. You get clear on a priority for your culture--one that is connected to what drives your success--and then you simply start changing processes, and structures, and even technologies in ways that make the new culture both real (immediate, visible) and permanent (long-term, infrastructure).

It's definitely hard work, but it is within our grasp--and pays hefty dividends.

From the Chat: What Do Culture Teams Look Like?

Dedicated culture teams can take many forms and include many voices, if every team member's input is handled properly.

"One way a culture team could work would be to **position them as a think-tank** and set up a show-and-tell aspect of how they interact with the rest of the organization."

- Greg Roth -

"I was on a culture team once but it turns out they just wanted me for my millennial-ness and didn't care about my input, so there's something to avoid. **Some places want to make it look like they're doing 'work' on their culture when they have money to spend but don't want to make a change.**"

- Lisa Campo -

"At my previous organization, we had our Chief Operating Officer (a true believer in change) and two others leading the culture change effort as a core team, and we met with every department to kick off, obtain feedback, and discuss the change we wanted to see. **The effort has got to be lead by the true believer, not a title.**"

- Sharon Grace -

03

**ASSOCIATION
CULTURE: WHAT NOT
TO DO**

Some association cultures are destined to fail.

BY ANNE NEVEL

What does a healthy workplace culture look like? It can be hard to picture your ideal working world. But I bet we can all think of what we don't want in a workplace. I'm going to relay my experience of working for an organization that got culture wrong, in the hope that we can all learn from their mistakes.

Red flags

I noticed some red flags before I went to work there. For a small organization, there were many positions open at once. I had to wait longer during the interview process than I would usually expect. **But I was optimistic about the organization and saw a lot of opportunity in my potential new position there.**

When I started work and some issues became apparent, I decided to be a part of fixing it. Early on in my time there, they conducted a staff survey which seemed like a good sign that they were taking their problems seriously. However, soon I heard talk from staff that this had been done before with negligible results. People were skeptical that it was even anonymous, and worried that if they wrote anything negative they would be cornered about it.

The results of the survey came out a little skewed. I spoke to a board member and he said the results indicated that people were mostly concerned about the disappearance of free oatmeal from the staff kitchen. **I realized then that they were ignorant of the bigger picture.** It was all about communication. The oatmeal was there one day, then gone the next, with no warning or explanation. The oatmeal was symbolic of a larger lack of transparency.

Taking action

In meetings with the management team and leadership, I tried to bring up the issues I saw around me. I referred to my experiences with similar situations in other organizations and how they improved culture. **No one else expressed interest in taking my ideas and running with them towards solutions, so eventually I took the lead.**

To start, I sent out an email to the entire staff explaining my plan and how it would be a fun initiative to get involved in. I had interesting responses and put together a diverse group of staff from various departments and levels. One person turned up at my office and asked, “Is this where we get to complain about everything going on in the organization?”

Pushback

When we got together for meetings, some great ideas came up. We started sharing our ideas at staff meetings. People responded well to begin with, and praised our ideas, but when it came to taking action there was no support. Pushback started happening from other parts of the organization, like the HR department, who didn’t want us to pursue certain projects.

For example, the group decided we should start celebrating staff birthdays. One department was already doing it, so we brought this simple idea to the leadership with a view of expanding it outwards. They were reluctant to follow through. They created obstacles by saying we should put out a survey to find out who wants to participate. **On one hand, they encouraged us, but in the end it never worked out.**

Stepping back

Ultimately, I realized I was fighting an uphill battle. Sometimes you might do all the right things and be passionate and rally the right players. But if there is a deep-rooted lack of trust, and a leadership culture that values lip service over walking the walk, you won't be able to make the progress you want.

This organization was not willing to admit they had a problem. They had a higher turnover rate than they reported. I could have continued working there and kept my head down and let things go, but that's not my style. Soon enough, I got a call from a recruiter about a position with another organization in my state and called it a day.

From the Chat: Interviews, Hiring and Getting Hired

How can interviewees and interviewers detect and communicate cultural values during the recruitment process? Attendees offer their tips and experiences.

"It seems people will say good things about how the office and organization operates even if some of it is not true. **They know what to say to sound great and avoid admitting where they have issues**, or perhaps are unaware or in denial about their situation. How do you get to the truth before taking a job to avoid discovering a less desirable reality after being there for awhile?"

- Kate Smith -

"Ask about how departments work together. I have found that says a lot. Also, **make sure you get to speak to your prospective immediate coworkers** - they will drop hints if they're not happy."

- Lisa Campo -

"Ask for a tour of the office. Look for fun stuff and listen to staff interactions."

- Pete Magnuson -

"While waiting for a prospective employer to welcome me to a job interview, I could hear an employee yelling at a supplier through the thin walls about a tight deadline. This was a for-profit job. It was very technical and they indicated it was lots of sitting behind the screen analyzing data alone in a quiet atmosphere. **During the interview, I asked about the culture, fun and balance.** 'Oh, it's great: flexible, family friendly, lots of group outings.' When an offer was pending, I put them to the test and asked about shortening my lunch, or coming in early in order to leave earlier for school events a few times a month. I got a hard 'No, we won't do that.' I was so surprised that they seemed to think that monthly happy hours were enough. I didn't take that job."

"Nowadays, **I always try to find out as much as possible before applying for a position.** I'll check their site, GlassDoor, check with my LinkedIn contacts, and ASAE members. If it's a nonprofit, I always download the 990s from GuideStar.org. You can get a lot of info, like top salaries, revenues, expenses, net assets, how many hours their board members volunteer and which programs get the most financial support. Sometimes you can find out vendors they are using – like an AMC or AMS or consulting company. All this helps you start to get a picture of the culture at the organization and at least helps you know what questions to ask."

- Carolyn Hook -

"If screening a potential workplace from the applicant point of view, I invite the employer to share their perceptions of the workplace culture. I approach this by directly by asking, '**How do you describe the workplace culture here at XYZ Association?**' or a little less directly, '**What attributes are you looking for in an applicant that would work well within your team and the association at large?**' The answers to either question have helped me vet the employer beyond the job description and has yielded greater awareness to the demeanor of my future colleagues, peers, and management."

- Tammy Barnes -

"From the hiring side, my old organization used to **take interview candidates out for an informal lunch** after the interview. It was amazing how many people dropped their guard and revealed some enormous bloopers."

- Lucie Robathan -

"Job interviews are based on an illusion! Employers want to talk about how awesome they are, and so do candidates, and nobody tells the truth. A big advantage of having a really clear, written-down culture is that you can share it with candidates and see how they would fit. **This also reduces the bias that makes people hire others just like me.**"

- Maddie Grant -

04

**CAN ONE TEAM
CHANGE A
WORKPLACE
CULTURE?**

Culture change that starts small can have a big impact at associations.

BY MICHAEL GRANT

Usually when we talk about workplace culture, we're talking about the entire organization. However, it is possible to look at culture on a more micro level, which can be important when trying to make significant change at the team level.

In 2010, I was brought in as leader of the communications team at the Canadian Society for Medical Laboratory Science (CSMLS) when the association was undergoing an overhaul. I knew that to accomplish the mandate I had been given by leadership, our team would need to make some significant culture shifts. This is my experience of changing culture for the better at a team level.

When I arrived at CSMLS, change was everywhere. **The organization was entering a period of rejuvenation both internally and externally.** It wanted members to experience that change. Communications was set to play a big role in that.

The communications team wasn't known for its creativity, innovation, and collaboration. It was stuck in a cycle of executing annual activities and projects, in a similar way it always had. Silos and turf protection were more common than the organization would have liked, and this team wasn't exempt.

Since then, we've re-positioned ourselves as an integrated and integral part of the larger whole, working closely with the other business units. We have aligned our communications programs with the organization's strategic plan and now drive parts of that plan. Our work has even garnered some industry awards for its creativity and execution. I'm proud of what the team has achieved and the team deserves all the credit for that.

There were some intentional actions I took to initiate the type of culture I thought the team needed in order to have the success I wanted it to have.

First, I looked for some quick wins to demonstrate that change was really happening. I think people tire of endlessly hearing about change, so I wanted to focus more on showing rather than telling. These did not need to be big, grandiose gestures either. For example, I booked meetings with every team in the organization to learn about what they did, where there was potential to work together and where we could help them. The perception of what the comms team did within the organization started to shift.

Within the team I needed to create a shared vision. We had a lot of turnover at the time and needed new employees to integrate into the team quickly. **During the hiring process, we looked for people who wanted to go on this journey with us, set bold and ambitious targets, and get creative.** When we had this team together, we got everyone involved. We over-included instead of under-included. The whole team participated in brainstorming activities, campaign planning and creative design to instill the idea of proactively taking ownership of our good ideas. We also moved a lot of projects in-house, both for budgetary needs and to reinforce this cultural piece.

Recognition was important to build confidence and reinforce behaviours. When we started to have some success in our endeavours, we talked about it and shared it. Taking the time to notice achievements, and sometimes just grabbing a drink after a project sunsetted, was important for morale, so we could move on to the next project feeling motivated and excited. We submitted for, and won, several industry awards. This not only energized the team but validated that our work was of a certain calibre. And being able to share these awards with our organization's leadership didn't hurt either.

As we were growing together as a team, at times it did feel like we were “different” than the rest of the organization. But we weren’t on this journey alone. The whole organization was on its own cultural shift and we were part of that too. We were just able to move along the continuum a little quicker because of our size and willingness to embrace change. I’d like to think we were an example to the organization of how culture can drive results and that we had a positive impact on the larger-scale culture shift taking place. The credit for the large scale change really belongs with the entire organization, as it took leadership from every level of the organization to accomplish it.

Eventually, and thankfully, our team didn’t seem like an outlier anymore.

From the Chat: Engagement With Culture Change

What do staff and other stakeholders want to experience in their workplace culture? Attendees talk surveys, rebrands, and member leaders.

"we are a small group and the **culture change is not only focused on the association staff**, but also on member leaders. How do we engage the members into the change?"

- Cliff Johnson -

"When our association went through a rebrand and major web redesign, it was in many ways a culture change because **we were changing things up from the way they'd been for 76 years**. A year after these major projects, we've had a great response from outside and we're meeting our goals. However, we continue to see internal struggles to adopt the new ways."

- Meena Dayak -

"Associations must be careful when polling their staff about culture. There is a risk of being overly pushy and overbearing at the same time. Without proper communication, staff members may feel pressured to complete these surveys, or worse, they might feel that they cannot be honest out of fear of repercussion. **Transparency is also key for building trust and changing culture**, so when the results come back, organizations must share them with their staff."

"We can use not-so-stellar results as teachable moments and share with our teams the lessons learned as well as the strategies for moving forward. Instead of pushing yet another survey, we need to take time to listen. As I've learned in my career, **no response can sometimes be a very clear response**. So if people are not responding to your surveys, it is not because they are not getting enough of them. Chances are there is something much deeper going on."

- Danielle D. Baron -

05

**AGAINST
BRAINSTORMING:
THE DESIGN SPRINT
SOLUTION**

Spending hours in meetings to solve simple problems? There's another way.

BY GREG ROTH

My pet peeve in the association world is bad brainstorming. The need to constantly generate new ideas is a challenge for most organizations, and we need new approaches that don't exacerbate the problem.

I have been an association professional for over a decade, and for the last few years I've worked as a marketing professional and, accidentally, as a culture consultant. **To offer an alternative to traditional brainstorming, I will discuss the case of a client that asked me to facilitate a creative retreat for their marketing team.**

I worked with this client for six months as a marketing strategist between the VP and the new junior-level hires. They were lacking someone of my experience level in the organization. I worked tactically with them on various projects over a six month period, allowing me to observe the culture there over time. The VP asked me to facilitate a retreat for 20 people about solving problems collaboratively and creatively.

At the retreat, I ran a [Design Sprint](#), a compressed version of design thinking. It is a five-day process that a team can work on for an hour every day to solve a specific problem. You pick the challenge at the beginning of the week. You devote an hour per day to each phase. At the end of the week, you have a prototype or a solution to present as a result.

We used the challenge of their newsletter's declining open rates as a test example to give them an idea of the structure in a 30-minute process. Once a team is familiar with the framework, it is easy to run through this design sprint process multiple times for multiple issues. It is learned and understood through repeated doing.

Here are some of the advantages of this problem-solving style.

All ideas are heard

With strong facilitation, it involves everyone and helps new hires to find their voice professionally and in the organization. **Unlike brainstorming, which allows the loudest voices in the room to hijack the conversation at the expense of other ideas, this process makes space for introverts to express themselves.** For this reason, groups are limited to about six people.

No time wasted

Another pattern I wanted to push back against was **death by meetings**. Sometimes at this organization, I wouldn't see the VP for entire days because he had eight hours of back-to-back meetings absorbing his time. I've seen this pattern of inefficiency killing autonomy and engagement time and again. Working in faster, leaner ways showed the team that there were other routes to productivity.

Opportunities to say no

A critical part of creative culture is **being able to say no for the right reasons**. This was one of the main takeaways that came from the retreat: people felt empowered by the opportunity to push back against imperfect ideas that they would regret pursuing down the line.

Speaking in words they understand

The language of change has to be comprehensible. The acronyms and the invented, complex language of change management consultants can be so alienating to people. **To get buy-in, connect with people in quantifiable ways that make sense for them.**

From the Chat: The Changing Face of Meetings

Moving away from long, inefficient meeting cycles means technology and innovation stepping in to fill the gaps.

“Our staff meets every other week to give updates and it used to be so mundane. We have since made the change to use the meeting not to give reports and registration numbers, but to **talk about a praise and a challenge**. Other staff who are having the same challenges with their clients may have more experience and helpful tips to share. We talk offline about advice afterwards so that we don’t tie up the staff meeting with our client issues. It’s working great!”

- Kelley Atkinson -

“We just implemented Slack at our organization and it made a huge positive difference in organizational culture, so much so that **we were able to attract employees who would have otherwise been on the fence**. Slack in particular is becoming a cultural expectation, like email. The burden of justification not to use it is on the organization.”

- Gordon Withers -

“At one organization where I worked, we did our update ‘meeting’ in Slack each week. This way all references to **topics that overlapped were in one place and it was searchable later when you needed it**. To be sure people read the conversation (instead of just looking things up later as they needed them), we had a quiz with prizes that were chosen ahead of time by the group.”

- Carolyn B Thomson -

06

FURTHER RESOURCES

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

- [App](#): Slack communication tool

- [Article](#): When Doing Strategy, Make Yourself An Outsider
- [Article](#): Salesforce CEO Leading By Example to Close Gender Pay Gap
- [Article](#): Brainstorming Is Killing Your Creativity
- [Article](#): Clean Up Corrosive Interpersonal Dynamics on Your Team with This System
- [Article](#): Amazon's Weird Meeting Culture

- [Blog](#): How We Manage Projects on a Fully Remote Team

- [Book](#): Leaders Eat Last: Why Some Teams Pull Together and Others Don't
- [Book](#): Firms of Endearment: How World-Class Companies Profit from Passion and Purpose
- [Book](#): The Five Dysfunctions of a Team: A Leadership Fable
- [Book](#): Uncontainable: How Passion, Commitment, and Conscious Capitalism Built a Business Where Everyone Thrives
- [Book](#): The Happy, Healthy Nonprofit: Strategies for Impact Without Burnout

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