FIVE-STAR PROFESSIONAL DEVELOPMENT RESULTS ON A ONE-STAR BUDGET

A COLLECTION OF INSIGHTS FROM SURGE SPRING

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, *Five-Star Professional Development Results on a One-Star Budget.* 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!

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FEATURED SPEAKERS

David E. Elliott

Learning Facilitator in Social Learning and Social Innovation

After more than 15 years working with NGOs and the higher education sector, David is now focusing his efforts on social/peer-to-peer learning and social innovation. All of David's work is grounded in years of experience, continuous lifelong learning and formal education. He is a graduate from the University of Guelph (BSc and MSc), St Francis Xavier University (Adult Education Certificate), he earned his Foundations in Design Thinking certificate from IDEO-U in 2017 and is a Certified Training and Development Professional (CTDP) through The Institute for Performance and Learning (I4PL). He also serves as the Chair for the I4PL Ottawa-Gatineau Chapter. Over the last 20 years he has worked and volunteered in Canada, Kenya, Tanzania, Cameroon, Italy and Vietnam.

Allen Lloyd

Executive Director, Montana Society of CPAs

Allen has evolved from an administrative assistant to an Executive Director working to take ideas and turn them into results. As Executive Director of the Montana Society of CPAs, it is his responsibility to work with members and the board to move forward the mission of the organization. He manages staff members and makes sure their efforts are focused on the pillars of Membership, Sustainability, Connection, Professional Excellence, and Advocacy.

Dana Murn-Kohal

Membership Manager, American Academy of Cosmetic Dentistry

Dana has 8 years of experience in non-dues revenue creation; membership service, research & growth; and developing online learning strategies. Dana has been trained to facilitate strategic planning and brainstorming sessions. She was also the inaugural recipient of the Wisconsin Society of Association Executive's Young Professional award in December 2014. Dana holds a Bachelor's degree in Political Science and Women's Studies from the University of Wisconsin-Whitewater.

Jenn Reid

Senior Manager and Learning Partner, T&O and Corporate Areas/BMO

Jenn Reid manages a team that supports role-based learning, compliance training, and enterprise-wide strategic capability development for over 60,000 people globally. Jenn has a consulting background, and has worked with leading organizations to design and implement major change initiatives, learning strategies, and other strategic projects. She specialized in change management, team effectiveness, process optimization, and strategic communication. Jenn is a Certified Training and Development Professional (CTDP), and Project Management Professional (PMP), and is a member of the Board of Directors for the Institute for Performance and Learning.

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GUEST SPEAKER

Emilio Arocho

Director, Technology and Digital Strategy, Food and Drug Law Institute

Emilio Arocho is a Washington, DC-based professional with a decade of experience empowering nonprofit organizations to operate as more functional businesses by allocating their modest resources towards mission-focused digital transformation strategies. As Director of Technology and Digital Strategy at the Food and Drug Law Institute (FDLI), he facilitates data-driven decision making across teams, and tailors cloud architecture and business processes to anticipate and exceed stakeholder demands. Emilio holds a Bachelor of Arts degree in Philosophy from Mount Saint Mary's University.

03

CO-WRITING PROJECT: BEHIND THE SCENES

The attendee chat during the Professional Development SURGE session was particularly animated, generating insights that deserved and demanded further elaboration. We therefore ran an experiment, inviting a few of the most engaged chat participants to join us and the speakers in a Google Doc, at the same time, for an hour-long collaborative writing project. The Doc included a set of questions which the participants were able to answer, along with a function that allowed them to comment on each other's contributions. The idea was for everybody in attendance to delve deeper into some of the pertinent themes raised in the original SURGE discussion, building upon and feeding off each other, and creating in the process a set of conversations that could be used in this ebook. A large portion of what you see below is a product of that process. **You can explore behind the scenes of this project here.**

04

PROFESSIONAL DEVELOPMENT MYTHS BUSTED

Supplement traditional measurements of professional skill sets with these tips.

BY DAVID E. ELLIOTT

I am approaching this article with a few beliefs about professional development already in place. First, for an association to be successful, constant learning is essential. Second, countless learning opportunities are available that are free or low cost. Third, learning is for everyone; from the receptionists to the mail person to the executive director.

However, there are some steadfast beliefs about education holding back the association community today. Let's run through each myth and look at how we can bust them.

1 Others know better and I have to pay for their knowledge.

We tend to believe others know better and that you get better learning if you pay more for it. This limits and underestimates the amount of expertise we already possess as association professionals. **For me, to teach is the best way to learn.** Peer-to-peer knowledge sharing facilitates deep understanding by filtering information through people's specific languages and contexts. Job shadowing or observation can be a useful way of doing this. Spend a day watching another team in a totally different department work on their projects.

2 Learning happens on a strict schedule (i.e. when we have the budget for it.)

There's a time lag between the culture of the employees and the culture of the organization. The organization might think learning only happens at the end of the fiscal year when they have the budget for it, as opposed to day-in, day-out. When learning opportunities are reserved and budgeted only for a select few in certain roles, people get shut out. **Bite-size improvements add up and make a difference.** Making learning a regular habit indicates a culture that goes beyond token educational events once a year.

3 Recognition should be reserved for rare occasions.

Recognition is either underutilized or misdirected. Instead of giving out a "ten years of service gift" once, let's use recognition to reinforce everyday achievements that we want to see emulated. For example, giving a shout-out to someone who took a course and shared what they learned with colleagues. Recognize valuable behaviors intentionally.

4 Everyone learns the same way.

I've always been a fan of competency frameworks. I like the structure and the organization they provide. However, this planning style can produce a one-size-fits-all set of solutions that says, here's what we need to learn this year to get the organization moving in a fixed direction, rather than being adaptive and tailored to individual needs. Utilize the tool in the right way. No one wants a competency framework that becomes eighty five items -- it's too hard to manage. **Short and sweet is key. What must we know to survive?**

5 Asking for help reflects badly on you.

People need to be comfortable saying "I don't know", instead of associating shame or embarrassment with that phrase. There's maturity in admitting what you don't know and recognizing where you need to grow. It opens doors and speeds things up when you can ask for help. **There's power in saying, "Tell me more."** And the person you ask will feel good when they can teach you something they are passionate about.

And finally…

6 Learning is separate from work.

I have heard some people talk about the idea of "sharpening the axe". If you take time to do that, you can chop the wood faster. **That to me represents taking the time to learn to make yourself and your organization more productive, efficient and effective.**

From the Chat: Overcoming Barriers

What are the biggest barriers to continuous professional development that you come up against day-to-day? How can they be broken down?

"Definitely time management. How many of us schedule our day so that we have professional development or learning as a part of it? **We have become slaves to our email inboxes!** But there are so many resources out there that are free and easy to access."

- Helen Viksnins -

"People don't want to work hard and learn new things. Too many people fight change like taxi drivers fighting Uber. It doesn't work that way anymore. People need to learn new skills to stay relevant but they just want to do what they already do. Our education system doesn't help this by putting people in boxes of majors that are tied to specific careers. As we change careers more often, **we need better resources for lifelong learning to allow us to pivot from career to career over time.** Colleges should allow students to come back and take classes in other areas to broaden their skill sets over lifetimes."

- Allen Lloyd -

"The idea that when you are at work, learning is this separate thing. **Learning can happen in the office, and in fact, it should happen in the office!** You can learn a lot from your co-workers, take an online course, and read an article while at work. These are not "wasting" time. These are valuable pieces of information that are only going to help you perform your job better. Learning and being in the office need to go hand in hand."

- Dana Murn-Kohal -

"Time and prioritization. **My problem is that I want to learn everything (really) but need to get many things done.** Also, finding quality learning experiences with so much noise out there. Everyone is promoting an online course nowadays. There just isn't enough time, at least to get into a deep learning space where you won't be distracted. Selecting learning resources is a big one - my job, like the jobs of many of us who work at smaller organizations, has many different unrelated facets to it, and sometimes it's hard to decide what is more important this year.

"For our members? The hardest part is definitely time and motivation. There are so many things CPAs have to learn just to maintain their competence (new tax reform, for instance) that it's hard to also get professional development that helps them accelerate. We're also trying to instigate a competency-based learning movement for CPAs as licensed professionals, and that takes quite a lot of work and so much communication with different stakeholders. This is how we're hoping to break down some of the difficulties. **If adults can learn at their own pace, have competency models to guide them, and use different types of learning beyond sitting in a classroom, they will get to be even better professionals.**"

- Jess Halverson Bowyer -

"Greatest barrier = workload + lack of manpower. The best way to break this is to make PD a priority on our own. Block off 30-60 minutes on the calendar every day/week and read and article, watch a webinar, do something to improve yourself. The long term way is to implement a culture of learning in the organization that is tracked, shared, and incentivized. Print a certificate and award it at a staff meeting "Employee with greatest amount of PD hours completed." "Employee to receive a new certification." **People love some form of recognition.** It could be a handwritten "thank you" or "congratulations" for those who prefer to avoid attention. This will encourage employees to develop, feel the need to continue to develop, and eventually, it will feel like a necessary part of their job description."

- Kat Mohammed -

"Time and paradigms. For me there is usually a paradox at play where a little bit of learning, which may take some time, can help reduce the time required to complete the work that is keeping the person so busy. Short sightedness doesn't allow some to see how the investment in learning can pay dividends, often very quickly. **My motto is "work smart, not hard."** An additional barrier, similar the one above is the resistance to change or comfort with the familiar. People may admit to being or feeling busy, but at the same time are resistant to changing the familiar pattern of work. A healthy paradigm constantly asks, is this work needed, at what priority does this work reside relative to other items and is this the most effective way to accomplish this task? These questions need to be asked frequently given that needs, priorities, processes and tools all change over time."

- David E. Elliott -

05

KEEP YOUR EYES OPEN: UNORTHODOX LEARNING

ASSOCIATION SUCCESS.ORG

Sometimes the greatest lessons come from the most unexpected places.

BY ALLEN LLOYD

Learning is everybody's job. Five or ten years ago, people at work might have thought, I'm just a cog in the wheel, done their job, and survived. However, that attitude is not viable today. The world is changing too fast to rest on our laurels. **Without ongoing learning efforts, organizations (and people) become stagnant and suffer.**

Everyone has their own learning style, and experiencing things - pushing buttons - is how I learn. When putting together training, I realized I could hold a Skype meeting with myself and use the record feature to create short specialized videos. **Making a five-minute video where you can share your screen and train people on new software or processes is quick and efficient.** Some people overcomplicate it and worry that it requires a Spielberg-level of production, but it can be very simple once you get used to filming yourself.

A couple of years ago, I managed the reimplementation of our AMS. There were a hundred little changes that people had to be made aware of, like buttons moving to different parts of the system. Initially, we tried calling meetings once a week where everyone would learn these lessons together, but it was a slow and time-consuming process.

A more nimble way to spread the information was for me to make videos explaining changes. Everybody needed to know these things, and everyone could learn at their own pace. I tried it once and sent it out to everyone. All of a sudden I could hear my voice from 20 different computers in different corners of our open plan office. Over time, I got better and better at it.

I learned from my kids that being excited makes people listen. They love the game Minecraft and watch this guy on YouTube called DanTDM. I hate Minecraft but I will watch him with them because he's so engaging and excited about the subject matter. To incorporate that into my videos, I would get super excited about these buttons and where they move to. It was boring content but I could hear people laughing in the office. I was willing to let people laugh at me if it meant they were learning how to use the software!

Keep your eyes open. Life teaches us so many lessons organically. Watching a video about gaming with my kids seemed like a complete waste of time but **I found a way to apply its style to my own work life.** How are other people doing it? How can you repurpose that in your own job? That's learning.

From the Co-Writing Project: Learning Can Be Cheap

What advice would you give to someone with few resources who wants to kickstart their professional development journey?

"There are many online courses that you can now take for no or low cost. I'm also a big reader. I like to read Harvard Business Review articles and have some association specific websites that help to keep me informed of things that I need to be aware of for the future. You can learn from many different instances. **Don't box yourself into thinking learning can only be a traditional conference setting.**"

- Dana Murn-Kohal -

"Khan Academy, Youtube, Google Scholar… Khan Academy is great, because **you can test yourself on the site**. I have this dream of creating my own personal PhD program where I study certain topics and end up writing a dissertation on my own, creating a learning contract that I follow through with as the year progresses."

- Helen Viksnins -

"Be curious and **don't be afraid to fail** as long as you learn something. Just because something doesn't apply to what you do today doesn't mean it might not apply to what you do tomorrow."

- Allen Lloyd -

"Don't just learn what you think you "should" learn. Give yourself the freedom to learn about things you just want to know because it's interesting. You'd be surprised at how many connections you'll make when you're thinking of something supposedly outside of your comfort zone or your expertise, that you're then able to bring back to your work. **You'll learn more when you're invested in what you are learning, but invested doesn't have to mean dollar**

amount. Check out local meetups, Google your question, and look up videos on YouTube. Don't be afraid to try something new and screw up. Most of all - have fun! Learning is fun."

- Jess Halverson Bowyer -

"Take 15-20 minutes to brainstorm what you want in life and commit it to paper. Write down absolutely everything you wish you could be. Look at that list, and break it down another step: what skills are needed for each thing you listed? Break it down further: are any of those skills available through reading or watching free resources online? Can any of the experience be gained through volunteer activities? Are there networking groups and events in the area you can seek out and participate in at no cost? **Once you start doing all that you can with minimal resources, you will equip your tool belt with more and more tools that will eventually lead to increased resources.** This may come in the form of people or connections made who can open doors for you."

- Kat Mohammed -

"Start small. These are some easy wins for groups and teams:

- After action reviews - debrief on projects, what worked, what didn't work, what can be done differently in the future
- Group rather than individual participation in webinars, followed by a discussion of what can be taken away and applied

"And for individuals:

- **Identify what area you want to grow in**
- Identify how you like to learn (don't read a book when you would prefer something more interactive)
- Seek feedback on strengths and areas for improvement - share your strengths (top ten list, lunch and learn, corporate newsletter, etc) and develop areas that require improvement."

- David E. Elliott -

06

BAKE LEARNING INTO CULTURE

Professional development can become part of day-to-day operations.

BY DANA MURN-KOHAL

I am lucky to work for an organization that values lifelong learning. For me, keeping on top of my field and enhancing my skill set does not come second to my day-to-day work -- it is an integral part of it. How can organizations make professional development a part of their culture and the air that they breathe?

Strategic priorities

Some organizations include culture and professional development in their list of strategic initiatives. This prioritizes these issues internally and for the board, who get regular updates on the progress of the strategic plan. You also have to educate your board volunteers about the internal learning culture. For example, we've all known boards that are uncomfortable with the prospect of failure. **However, failure is a natural side effect of the learning process -- people learn from trying things and working out what went wrong.** When such an experiment is underway at your organization, it's important that the board are prepared to let this happen.

Hire for culture

Make sure that people you're hiring are lifelong learners who believe in a learning culture. **From the first impression you make on a potential employee, ensure that they understand your mission statement and that you're upfront with what your culture stands for.** Incorporating the language of learning into your culture statements can help with the hiring process.

Learning at all levels

Everyone in the organization has something to offer. Do people below management level feel comfortable pitching ideas to leadership, or questioning ideas coming from the top when they have concerns? Creating a space where that's not seen as threatening allows for checks and balances. **Reverse mentoring is becoming more celebrated.** Major CEOs of companies are being coached by millennials because they have fresh perspectives to bring to the table.

Share the learning

Co-learning can be horizontal as well as vertical. Sharing knowledge and skills between jobs and departments is an effective and low-cost way to encourage professional development and break down silos. When I come across content that is relevant to my coworkers, I send them an email. In my organization, that gesture is warmly received.

What do staff want?

Staff surveys help to understand where individuals are on their own learning journey. Everyone has a unique style of learning. **If you can pinpoint what individuals need through data, it helps you to offer tools and opportunities to help them thrive.** These surveys can happen quarterly or biannually, so you can follow up on the success of your efforts.

Personal learning plans

I'm a process-oriented person. I enjoy using self-paced educational resources, like Coursera, that I can find online for no or low cost, and work on anywhere, anytime. As a millennial, it is totally in my comfort zone. **I try to reserve half a day per week for learning, because it gives me time to focus and achieve more.** In our busy lives, it's easy to pop in and out of activities without keeping a steady routine. Structure allows me to implement lessons in different projects while they are fresh in my mind. This can be hard for people to get their head around.

"You take half a day of your working week to... not work?"

The idea that learning is not work is untrue. It takes a shift in culture to accept that, even if I am not working on an immediate project, what I am learning will come into play for the organization later. **As an individual, I advocate for myself and identify what areas I need to improve upon and what steps I need to take to reach my goals.**

From the Chat: Who is Responsible for Professional Development?

Is it more useful to view professional development as an individual project or an organizational project? Why?

"It's essential that it be organization-wide, because otherwise **those who are motivated to seek out professional development will gain the benefits** while those who don't take advantage lose out on the opportunity."

- Helen Viksnins -

"In my opinion, it has to be a two-pronged approach. You can have an organization-wide strategy, but **if the individual doesn't buy into the plan, it's not working.** Individuals have to have their eye on professional development as a way for them to grow personally and professionally. It is short sighted to view professional development as something that you 'have' to do because your organization 'said so.'"

- Dana Murn-Kohal -

"It is a mix that needs to be based on the organizational goals. If the organization needs to be addressing technology issues with our members then the staff need to learn about the technology so we can better serve our members. At the same time, we need to be aware of the different skills our staff have and finding ways to leverage current skills and interests with where the organization needs to go. **People need to see development as a personal investment.** Moving forward, our skills are what make us marketable and if we invest more in our skills we will be a much more marketable person in the future."

- Allen Lloyd -

"Both. If the individual doesn't contribute to deciding what to learn or selecting things that interest them, they don't have that intrinsic motivation that creates the best learning experiences. The organization needs to be involved because it should be looked at as a strategic advantage to have better qualified staff.

To take this one step further, **there's a new type of reporting called Integrated Reporting that is taking off in some larger businesses and other countries.** Basically what it does is take into account human capital, strategy, governance and prospects when reporting on an organization instead of just the financials. This helps create the framework for putting ROI on learning, which makes it easier to have the conversation about why professional development is valuable. If the individual knows that his boss will recognize the importance of his learning, it's easier to ask for what you need. It all has to work together."

- Jess Halverson Bowyer -

"I agree, both. It will always come down to the individual to want to better themselves. If there is ambition, it will lead the way and force the individual to see things through to the end or seek out greater challenges. Ultimately, the individual should know what their weaknesses are or what other areas they would like to learn more about. From an organizational aspect, **if the organization invests in its people, its people will invest in the organization.** This is a tool for success and if made a priority, it could really foster loyalty and commitment (and reduce turnover!). Also, the organization can identify skills the employee maybe lacking either for their own job title, cross-training, or to move up to a higher ranking title."

- Kat Mohammed -

"I come back to the issue of culture. As an organization, it needs to be part of the culture. However, for the individual, it needs to be a project, something specific, meaningful and relevant. A balance needs to be found between what everyone receives in terms of content and what meets people where they are with what they need. At the organizational level, broad spectrum content needs to be on the essential competencies or values of an organization, lifting everyone to a high level on a very focused set of skills and knowledge. Where the organizational momentum can be gained is in **the support of learning in general, the culture around learning, that should be the same regardless of function, role or geography.**"

- David E. Elliott -

07

FAIL FORWARD: LEARNING ANYTIME, ANYWHERE

The key to continuous learning? Don't be afraid of making mistakes.

BY GREG ROTH

Learning happens everywhere, all the time. Opportunities for education and professional development are not limited to formal events like conferences and certifications. Thinking about learning as an anytime, anywhere activity means getting comfortable with the process not being perfect. When you are creating a learning resource for members or colleagues, start small, play with it and see how it lands with your learners. I call this "failing forward."

For example, you can put out a two minute video on a specific topic a lot faster than you can put out a 60 minute eLearning module. It can be as simple as recording it on your phone and sending it out to a test group, then learning from their feedback before going into a big production process. The results might surprise you and lead you to entirely new methods of serving your members or colleagues. **This way, you also engage the learners who are involved in the feedback process, instead of treating them as passive consumers.**

Internally, it's also important to set the tone from the top – whether that's with formal leaders, or informal influencers. If leaders and influencers are modeling a culture of continuous learning, where they're openly and publicly engaged in their own development, they make it that much more accessible and enjoyable for others.. **Leading by example helps foster a culture of lifelong learning.**

It's also important to remember that a one-size-fits-all approach rarely works. Your learning preferences will be different from the person next to you, and **some topics may lend themselves better to one delivery mechanism over another. With some people or programs, you'll have great success with a more formal learning environment, while others may thrive on Instagram or YouTube.** Find ways to meet learners where they are. And remember to keep iterating.

The emphasis on failure has limits, of course. To avoid failing on the big stuff, it's best to break things down into small pieces and use an agile or lean methodology where you learn lessons from a minimum viable product first, and iterate. Fail on the small stuff, learn from it and move forward, whether that's in the learning products that you deliver, or in your own day-to-day work. **Contribute to an organizational culture that accepts failure as a part of the process.**

From the Chat: Your Personal Learning Style

Do you have any anecdotes about a particular learning curve or experience that changed the way you work?

"I learn best by interacting with other people. I am also energized by new ideas I hear or experience in learning situations. Going to ASAE conferences, most notably Great Ideas, I always return with notebooks full of "great ideas." **I learn both in the sessions as well as in random conversations with people at receptions or between sessions.** One session I participated in was about list-making and I have been using the Evernote app for several years now, so I have an archive of helpful notes and ideas."

- Helen Viksnins -

"**I learn best by doing and failing, then failing better next time.** A lot of my professional skills came out of voluntary roles that I took on as a student organiser and activist, so there was room to fail without the pressure that paid employment creates. For example, I learned the hard way how to deal with media in press relations roles, after a couple of interviews I gave where journalists painted unflattering and inaccurate pictures of groups I was working with. Now I know to be concise and not give away any more information than is necessary to get my point across!"

- Ellen MacAskill -

"It depends on what I'm trying to learn. With new skills at the office, like how to complete something a certain way, I like to be shown and ask questions. When learning about a new big idea (for instance competency-based learning), **I love learning through the research process, by reading articles and looking at what others have done.** When working on something conceptual like this I also like to ask experts one on one questions, and am excited to learn from an advisory board we put together for that reason later this week. With something where there is a "right" answer like learning new software, I like learning something, trying it, and then figuring out what I did wrong. Also, I read and listen to podcasts constantly. One of my new favorite ways to learn is by listening to a podcast while I'm doing something that doesn't take much active concentration (dishes, driving, laundry). It makes the boring stuff more fun!"

- Jess Halverson Bowyer -

"I am a self-paced learner, because I like to be able to learn at all times. In-person events are great, but I can't always devote the time to be away from the office for a long period of time. **Being able to pop into a self-paced, online class for a few minutes and then do something else provides me with the freedom to learn whenever and wherever.** I've actually taken an IDEO U course at the poolside before!"

- Dana Murn-Kohal -

"I am a learn-by-doing person. If I can't apply something right away my brain just forgets it. One thing that transformed how I work was learning how to use pivot tables in Excel. **Overnight I was able to answer my own data questions and then dive deeper to provide my organization with deeper insights.** Coupled to this is learning SQL to be able to access data in a more efficient way. As we generate more data it is important to learn the baseline skills needed to navigate the data and be able to communicate with both business owners and data technicians."

- Allen Lloyd -

"My learning style is more in-person. I ask a lot of questions and have always benefited from extra credit and recognition for being an active participant. Now that I am well out of college and have a family, I do not have the luxury to sit in a classroom for days or hours. I have found that I need to block off time where I will not be interrupted and focus on the lesson at hand. I like to make physical notes as I go along, sometimes even re-writing the info on the slide. There is something about committing the words to paper which allows me to retain it. My only quirk with my note-taking is that I like to use different colors. **The different colors help me more easily identify areas I need to pay attention to when I revisit my notes**, but also makes the process more of a "fun" experience for me."

- Kat Mohammed -

"I'm a facilitator so guess what, **I learn well by teaching. I call the process reverse engineering.** I need to take something apart to understand it for myself and then I reassemble it in a way that is more accessible to people. I have taught a few photography courses and the process has made me a better photographer. I've moved away from content and now focus more on facilitation. Here I find the classic plan, do, study, act cycle along with studying others and external feedback to be great."

- David E. Elliott -

08

USING TECHNOLOGY TO INSPIRE AN EVOLUTIONARY MINDSET

ASSOCIATION SUCCESS.org

Integrating technological fluency and flexibility into the way we work creates a culture of innovation across departments.

BY EMILIO AROCHO

It is impossible to ignore the rapid technological developments happening outside of our associations. Software tools are becoming more complex while also becoming easier to learn and use, with new features being added at an unprecedented rate. **Staying on top of this whirlwind of change has many benefits, and it is also changing the way my association operates.**

Instead of IT standing isolated and independent from other facets of the organization, digital operations are becoming more entwined with each individual department. This shift offers greater professional development opportunities for staff, both because of the ease of adoption inherent to the technologies we are employing, and the abundance of learning resources we have available for individuals to become versed in those technologies. By **diffusing technological expertise among staff**, we are iterating digital improvements and achieving data insights at a faster rate than ever before.

One of the ways we have achieved this is to carefully select the technologies we adopt. **Technology providers must be as customer-focused as our association strives to be member-focused**, offering user-friendly experiences, unerring customer support, and excising unnecessary complexity or customization requirements. This empowers individuals with drive to learn about a new tool outside of their regular area of expertise and apply it to their work. People at my organization are regularly impressed when a team member uses data modeling software to address an unanswered question in a succinct way, or exhibits a deep understanding of our data quality requirements, or conducts complex member analyses, despite only being a couple of months on the job.

People cross-departmentally are coming to see technology and data as a complement to their work, rather than a hurdle to be overcome – **and as such digital innovation conversations are becoming the new normal.**

We have also adapted the way we integrate data into our planning. We talk about data before a program is conceived, as we are conceiving of it, and during its execution. By constantly emphasizing what data we want to collect, what we plan to do with it, and how we will use it to improve, everybody is offered a more transparent sense of the larger analytical picture. **Data language is woven organically into the discussion**, making it feel less like a box to be checked and more like a crucial component to the work we are already doing.

This evolution is exciting. Junior staff have been instrumental in driving this culture forward, and this evolutionary mode of work is appealing to them because it goes beyond being assigned specific task, directly into creating and contributing to new opportunities for the organization at large. Having easy-to-learn technologies can both empower individuals to pursue new projects and contribute to an association-wide culture of innovation.

This has been an interesting development in our association, and one which we did not intentionally embark upon. It is really affirming to see wider innovative technology trends mirrored in the way we as an association operate, and **to see a culture organically forming that is more fully rooted in an evolutionary mindset.**

09
FURTHER RESOURCES

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

- **Online Courses**: Khan Academy
- **Online Courses**: LinkedIn Learning
- **Online Courses**: Lynda
- **Online Courses**: Coursera
- **Online Courses**: IDEO University
- **Online Courses**: Udemy
- **Online Courses**: ASAE Online Learning Series

- **Book**: Sprint: How to Solve Big Problems and Test New Ideas in Just Five Days
- **Book**: The Happiness Advantage: The Seven Principles of Positive Psychology that Fuel Success and Performance at Work
- **Book**: The Checklist Manifesto: How to Get Things Right
- **Book**: Willpower: Rediscovering the Greatest Human Strength

- **Communication Framework**: Integrated Reporting

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