

CO-CREATION: BUILDING SHARED PURPOSE AND VALUE WITH MEMBERS

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, *Co-Creation: Building Shared Purpose and Value With Members*. 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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01

FEATURED SPEAKERS





Sarah Frohnhoefer
**Senior Director, Business
Strategy & Development at
Marriott International**

Sarah Frohnhoefer is a business strategist whose methodology is grounded in co-creation and user experience. She currently works for Marriott International leading a joint venture with the Alibaba Group. Prior to joining Marriott, Sarah worked with many companies, government organizations, and non-profits to redesign their business models by identifying unmet customer needs and transforming their business to deliver on these needs. A few initiatives that may be familiar to our SURGE community include her development of ABIM's member co-creation methodology and her design of Harvard Medical and Business Schools' Forum on Healthcare Innovation Challenge to accelerate healthcare innovations speed to market. Sarah holds an MPA in International Economic Policy from Columbia University and an MSED in Educational Science from Pace University.





Eric Lanke

President & CEO, National Fluid Power Association

Eric Lanke is the President and CEO of the National Fluid Power Association, a trade association of more than 340 organizations serving the hydraulic and pneumatic industries. He is responsible for setting NFPA's strategic direction, and overseeing the programs and communications needed to achieve its objectives. He also serves as the President and CEO of the NFPA Education and Technology Foundation, an affiliated charitable organization that supports outreach, education and research programs in fluid power.





Nick Marzano

Director of Education, Society of Hospital Medicine

Nick is a lifelong learner with over 15 years' experience in education and organizational leadership. Currently, he brings those very alliterative traits to bear as Director of Education for the Society of Hospital Medicine. He also serves as director on several nonprofit boards, and consults with organizations to design more engaging events and strategic processes. He welcomes your new ideas, challenging thoughts, and banter on Twitter.





Eric McKeeby

**Director of Community
Engagement, American Board of
Internal Medicine**

As Director of Community Engagement at the American Board of Internal Medicine, Eric brings more than 15 years of communications, engagement, public affairs, marketing and grassroots action experience with an emphasis on education, health, science and urban renewal. Eric specializes in executing community-driven programs focused on health, engaging a range of physician, patient, health system stakeholder and interest groups.



02

BEFORE YOU BEGIN: CO-CREATION TIPS

Working with members to make decisions takes intention, planning, and even culture change.

BY ERIC LANKE

Co-creation happens when an association and its members work together to create something that is valuable for both the association and the members. Generally speaking, it is important for the association to maintain decision-making control over the use of resources in the co-creative project, whereas the participating members should be given control over design decisions. If too many of the design decisions are made on the staff side, you risk creating something that might be sensitive to the needs of the marketplace, but without you having engaged in a co-creative exercise with your members.

| *Members derive value from the process of development*

Remember that members can and should derive value not just from the finished, co-created product, but from the process of development itself. At my own association, we've done a series of roadmapping sessions where we use a facilitated process to identify technological challenges facing our industry. The end product helps us set an agenda for the overall industry, and our members can take the end product back to their own companies and embed it in their own development processes. But members who participated in the roadmapping process have also learned how to roadmap, and this can help them address other challenges within their companies. The Roadmap is useful to them. **But the process of roadmapping is even more valuable.**

| *Consider internal relationships*

There is too often an unfortunate adversarial relationship in associations between the group people consider the association and the group people consider outsiders. Whether that's staff versus board, or staff and board versus membership, it's a dangerous way to think about your association. **Embracing**

co-creation is a way of beginning to redefine this relationship between “the association” and “its members.” Co-creation helps bring your members inside your association and helps establish an important duality between the decision makers and the participants in a co-creation experience.

| *Define roles for those involved*

In my association, there is one process that determines our strategic objectives, then another process that develops programs for each of those strategy areas. Both are critically important, but we have to be clear about who is responsible for each so each group succeeds. If people think they're in charge of strategy, they're not going to accept the design constraints that you place on their program development process. If they don't accept that their role is to live within a particular strategic objective, it's not going to work. Lack of clarity on this essential point creates tension in the co-creation process, and often prevents the organization from delivering the results it seeks.

| *Look for opportunities for collaboration*

Co-creative opportunities are practically everywhere, and can help an association address some of its most intractable problems. By way of example, my association, like a lot of manufacturing-based trade associations, is still trying to figure out what we call “the workforce challenge.” Member companies have a hard time finding the engineering talent they need to grow their businesses.

This problem is a wonderful co-creative opportunity for our association and its members. We started by experimenting with a middle school outreach program that's branded for our technology space. We initially developed it at the association level and pilot-tested it in our local community where we're headquartered. But very quickly, we shared it with our members and asked them to run it independently in their local communities. Now, we are regularly bringing all these folks together to share the successes and failures they've encountered. That keeps the co-creation practice running -- slowly iterating a better product and vastly extending its reach.

| *Don't underestimate your abilities*

Finally, remember that if you're an association, then you're probably already doing some level of co-creation. It's endemic to the association environment. **But being more intentional about co-creation can expand on the value of member engagement tools already at your disposal.**

From the Chat: Building Events and Conferences

How can co-creation revolutionize your next annual conference or networking event?

“Who is using co-creating to shape their events either with members or sponsors? Co-creating events is a great way to make sure that members are getting the content they want, and **feeling like they are a part of the process.**”

- Melissa Clark -

“I consider all association events to be co-created since **almost all rely on members creating and presenting content.** Usually the model (at least that I’ve experienced at multiple associations) is that members submit proposals and a volunteer committee selects those that will present.”

- Maggie McGary -

“Is anyone using an annual conference as **an opportunity to co-create live with their members (whether that’s a product, a decision, or a vision for the future)**? We are in the early stages of planning a large scale session for our next meeting, and would love to connect with others who have attempted this. I’m surprised how rarely I see a dedicated space or effort for this at conferences.”

- Nick Marzano -

“At a user conference, we had an idea board that people were encouraged to add to. We took the top ideas and had an open session where these things were discussed with everyone who attended. **It informed our roadmap.**”

- Rick Rutherford -

03

HOW TO CO-CREATE WITH EMPATHY

The question is not if you start co-creating but when.

BY ERIC MCKEEBY

The first step of any co-creative process is listening to your audience with empathy. Making decisions as an organization after gathering external viewpoints is a one-way dialogue. To move into the realm of co-creation, stakeholders must have a seat at the table beyond this initial input. This is an opportunity for organizations to learn from the wisdom of others.

In my previous position at the American Board of Internal Medicine (ABIM), we found that the community was eager to share their ideas. When we announced that we were undertaking a co-creation process, we started by putting out surveys, and members wanted more. **They wanted to break down the gates and join the fun.** The more we could do to facilitate that, the more it became a true co-creation process.

ABIM is a credentialing body and does not have dues paying members. However, diplomates who have earned the organization's credential often feel like they should be voting on who's in governance and participating in other ways typical of a membership association. Earning the credential proves that physicians are staying up to date with knowledge in their field, which is necessary not just for physicians but for patients and society as a whole.

The more diverse the community involved in a co-creation process, the higher the stakes. We have 200,000 people from different walks of life, locations and specialties. What's a community physician in Montana got to do with someone working in palliative care in California? Trying to serve everyone at once is like trying to get everyone in a mid-sized city to agree. When you have a highly educated and vocal audience, that's not easy.

The organization was at a turning point when ABIM began the process. Physicians were gravitating away from the organization in various directions. There was so much backlash and upheaval that the only way to counteract that

was to entirely switch our approach to making decisions. It was an opportunity to rethink our direction as a community and get a lot of stakeholders involved, including other organizations that represent physicians and patients.

On-boarding everyone took time. **When an organization that usually works in a hierarchical structure engages in co-creation, there are many internal dynamics that have to be addressed**, including ensuring that everyone understands the potential benefits that will come out of it. A more inclusive and expansive approach has helped bring the organization to life.

Another challenge that people may face when trying to start up co-creative processes is pressure to invest any available funds in operations or in the core products of the organization. I fear that if the process is thought of as a function and not a capability, then when the initial problem is solved, folks move back to the way they've done things before and focus on investing in what they think will yield more profits. Effective co-creation itself takes ongoing and conscious investment.

A great starting point for anyone interested in co-creating is coming up with a bumper sticker slogan that sums up what you're working toward. The purpose that kept ABIM moving forward despite these challenges was **the need for shared knowledge**.

I believe that the question isn't if you start co-creating but when. It will happen organically or you can plan for it to stay in control. **I encourage everyone to think through their strategies and capabilities for co-creation and empathetic listening sooner rather than later.**

From the Chat: Getting Comfortable With Discomfort

Bringing members into processes is never going to be easy.

"When people get uncomfortable, you're getting somewhere. If everyone is uncomfortable, **you may have found the pain point**. Sometimes you or your organization is the pain point and that's okay."

- Sarah Frohnhoefer -

"Discomfort creates movement."

- Rick Rutherford -

"In online communities, the same rules about discomfort apply. Too many associations a) **don't listen or pay attention to discussions in the online community** and/or b) get freaked out when there's disagreement or tension."

- Maggie McGary -

04

**CO-CREATION: THE
VALUE IS IN THE
PROCESS**

Just ask your local government. No, seriously.

BY NICK MARZANO

In another life, as a middle school English teacher, my classes would kick off the year by proposing, discussion, and voting on a class constitution: a list of expectations, norms, and promises we would agree to uphold for the rest of the year. Year to year, and class to class, the lists didn't look that different. But the process of participation, and subtle nuances in wording and norms, really mattered to the students. Just as important as the end result, the journey had generated buy-in.

Co-creation is the making of shared value alongside your customer, your audience, your members. It's a tool for those times you need to go deeper than a survey or focus group, inviting participants to brainstorm, explore, and make shared decisions together. If this sounds similar to design thinking, you're on the right track. Both are rooted firmly in empathy. But whereas design thinking includes a range of methods that focus on observed behavior, co-creation almost always refers to well-designed, facilitated workshops in which you work alongside your audience to generate ideas, explore and prototype, or converge on priorities. Your members are sidekicks on the adventure, not just research subjects. **Because of that, co-creation is often as much about the process as the product, something I've written about before in the context of the [IKEA Effect](#).**

We can certainly use the principles of co-creation and meeting design in our daily routines. If you've ever sought your team's ideas, exploration, and decision on a new workflow or goal, you know what co-creation feels like.

What if associations went bigger than co-creation in the office? **What if we involved members in the co-creation of essential programs, key strategic questions about the future of their profession, or decisions about how a portion of their membership dollars should be allocated?** Co-creation at this

scale requires a commitment to the process, as well as an investment in time and resources. You'll need a plan to design, house, and facilitate workshops that ask the right questions and move the conversation forward. You'll need a plan for advertising to ensure the right people are in the room. And you'll need a communications plan to keep participants informed in between sessions, as staff explore feasibility and try to operationalize the outcomes of co-creation.

Is it worth all that? To answer that, we could look to any number of corporations and industries who are making co-creation an integral part of their strategy and product design. Instead, let's look to another often cash-strapped type of corporation: local government. If that sounds surprising, consider the incredible diversity of the people cities are required to serve, and the enormous impact that one city decision can have on thousands of lives. To tackle this complexity, some cities rely on the power of the co-creation process.

There are plenty of use cases worth noting. **Co-creation is relatively 'old hat' to city planners, who have to consider the desires, hopes, values, and needs of a community, and understand the positive or negative effect the built environment could have on residents before finalizing a plan.** In another example of co-creation at work, New York City allocates a million dollars a year to each district for a [participatory budgeting program](#). Ideas and decisions on how to spend the money are generated through sessions and online forums run by and for citizens. And co-creation can help right the ship when citizens are furious over an executive decision.

My hometown of Philadelphia wrote the book on this as it attempted to deal with the fallout of the financial crisis.

Like a lot of cities, 2009 was a tough year for Philly. The City needed to close a budget deficit of deficit of \$108 million, and fast. When the Mayor announced emergency cuts to public services like community pools and libraries, citizens were livid. These were high value spaces and services for the community.

In response to this outcry, the City recognized the need for a new approach. Partnering with the University of Pennsylvania's Project for Civic Engagement, they hosted four workshops to explain the situation and workshop solutions. **Through guided exercises, participants were invited to discuss the services that mattered most.** They also worked within the constraints of the very real financial situation, to consider alternatives, safeguard essential resources, and weigh in on tough-but-necessary cuts.

Co-creation didn't magically restore city coffers. Some services had to be cut--no way around it. But it did raise some creative ideas the city had not considered. It also created a map of the services the community valued most, and generated buy-in on the shared sacrifices that had to be made. After a unilateral stumble, the City regrouped, presented a seemingly immovable object to the community in a realistic and transparent way, and created a better way forward through co-creation.

As associations, we can learn a lot from local government about the power and potential of co-creation. If cities and urban planners can engage citizens from diverse walks of life to create innovative programs and a shared vision for the future, we can find a way to co-create with the various special interests and audiences that make up our membership. In the process, we may help more members to view their association as more than a bundle of services, meetings, and discounts. **Just maybe, more will come to think of it as *their* association.**

From the Chat: When the Time Comes to Sunset

There's an art to phasing out projects that no longer serve the organization.

"Any advice on sunsetting activities that are clearly no longer providing value in order **to realign resources for innovation**? We have the data but lack the courage for fear of taking something away from the members."

- Dennis Sadler -

"It all goes back to relevance and value proposition. **You can experiment with sunsetting the same way you can experiment with launching**, in small experiments and not all at once. It also starts with checking our ego at the door, many times we don't sunset because we are hoping we can turn it around and save face."

- Guillermo Ortiz de Zarate -

"Sunsetting is just as important as launching! Often times, organizations get so focused on adding value, that the thought that a current offering isn't adding value any longer sometimes gets overlooked."

- Dana Murn-Kohal -

05

FURTHER RESOURCES

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

- [Blog](#): Six Reasons Why Co-Creation Makes SURGE a Transformative Event
- [Book](#): The Power of Co-Creation: Build It with Them to Boost Growth, Productivity, and Profits
- [Book](#): Visual Leaders: New Tools for Visioning, Management, and Organization Change
- [Book](#): Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers
- [Paper](#): The IKEA Effect: When Labor Leads to Love
- [Video](#): How the 'IKEA Effect' can motivate people to work harder

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