

REVAMP TO REVITALIZE AND GROW

A COLLECTION OF INSIGHTS
FROM **SURGE OPTIMISM**



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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, *Revamp to Revitalize and Grow*. 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



Angela McMillan

**Director of Special Events,
Communication, and Marketing,
Greater Kalamazoo Association
of REALTORS**

Angela McMillan LOVES communication because it has the power to bring us together, motivate us, and inspire action; it also has the power to divide, depress, and defeat. Angela is passionate about lifting people up through communication because, as she puts it, “Words matter.”

She is constantly honing her skills to help organizations create exciting interactions with the people they serve. She has an educational background in liberal studies, with an emphasis in innovation, design, and society. She is a critical thinker who finds creative solutions and has a proven track record with implementing inbound marketing, developing member-based communication and operations to delight customers, elevating event communication and management, and leading strategic planning and organization. Angela has actively studied communication, marketing, and people for over 15 years and is excited to share her experience with you.

She believes in sincere, direct, communication. She is a card-carrying optimist, wife, vegetarian, lifelong learner, proud mother of 2 kids and 2 cats, and lover of life. Her favorite things include peacocks, trivia, and dark roast coffee.





Mary Byers CAE, CSP
President, Mary Byers Inc.

Mary Byers, CAE, is co-author of *Race for Relevance: Five Radical Changes for Associations* and *Road to Relevance: 5 Strategies for Competitive Associations*. She's the former director of communications and member services for the Illinois State Dental Society and served in that capacity for nine years prior to starting her consulting business in 1998.

Mary specializes in working with volunteer association leaders and chief staff executives to help define their roles and clarify their vision through leadership conference programming, facilitating strategic retreats and coaching.

Mary is a certified association executive and a member of the National Speakers Association. She is also the author of seven books.





Danielle Baron CAE
Executive Director CAATE -
Commission on Accreditation of
Athletic Training Education

Danielle Duran Baron is the Executive Director of the CAATE, Commission on Accreditation of Athletic Training Education, the national accreditor of professional, post-professional and residency athletic training programs. Prior to that, Danielle was the Chief Marketing Officer at ABET, the global accreditor of college and university programs in STEM disciplines. In that role, she directed the organization through an award-winning rebranding initiative and managed the efforts of the marketing, communications and events staff to reflect ABET's global scope and to reach an increasingly diverse audience.

Bringing 20 years of global experience in communications, branding, marketing, events and business strategy, she is a journalist by training, and her work has been published in the United States, Europe and Latin America. She has a bachelor's degree in communications and international relations from Randolph-Macon Woman's College, a master's degree in journalism from New York University and an executive MBA in marketing from Ibmec Business School, in Rio de Janeiro. She is also a Certified Association Executive (CAE) and an ASAE Diversity Executive Leadership Program (DELP) Scholar. A native of Brazil, she is fluent in English, Portuguese and Spanish and conversant in French and German.





Addy Kujawa, CAE

**Chief Executive Officer,
American Alliance of
Orthopaedic Executives**

Addy Kujawa is a results-oriented, diplomatic, creative, energetic, dependable, motivational leader with outstanding, proven skills in most areas of association management. She is an expert in strategic planning, visioning, and executing an organizational plan. She knows how to engage members, volunteers, and staff in organizational mission goals and objectives. She is consistently successful at identifying and capitalizing upon market opportunities to maximize reach and drive revenue growth.

Addy currently serves on the Board of Directors for the Indiana Society of Association Executives, has served as Chair and Vice Chair on the ASAE Membership Section Council and has also served on the ASAE Gold Circle Awards Committee and a number of other volunteer positions. She has been a content leader for negotiating, culture, hiring, membership models, AMS selection, personal branding, and more. Addy's experience includes more than ten years in public relations for the American Academy of Orthopaedic Surgeons, and nearly ten years as chief executive officer for the American Alliance of Orthopaedic Executives.



02

THE UPS AND DOWNS OF REVAMPING COMMUNICATIONS

New copy, new association?

BY ANGELA MCMILLAN

What is the aesthetic and overall experience that members have with your association? How do communications play into that experience? Do you need to shake it up?

At the Greater Kalamazoo Association of Realtors, we realized that while our meetings and services were of value to our members, we weren't doing enough to make them exciting and engaging. **By taking an experiential approach to our services, we were able to revamp what we already had, make some tweaks and (sometimes) see high engagement as a result.**

In this ongoing revamping process, what worked and what didn't? Below are some examples of communication experiments we have tried out to make our services and events pop.

Annual Meeting

At our annual meeting, we install our incoming leadership, recognize our existing and outgoing leadership, and recognize various members who have been active on committees or won awards. It's the largest gathering of real estate professionals in our community and **we wanted to make it an event to end the year with pride and celebrate all that we've achieved.**

The revamp started with the program. What started out as a one-sheet, timed outline of the event schedule was turned into a keepsake item. We added pictures of our incoming leadership, their titles, offices and how long they'd been members. We provided bios and pictures of the current recipients of our REALTOR of the Year award, alongside a list of all our previous recipients. We listed all of our committee members, investors and business partner members,

and the schedule for next year. It was designed in house and printed offsite to make a lovely hardcopy piece.

There were also several pages of photographs and collages of members. Our Facebook page indicated that members engaged with us most when they saw pictures of themselves doing association activities. They could flick through this brochure before the event began. **Small things like this made such a huge difference to the experience of that event for our members.**

Additionally, we hired professional emcees to better engage the audience and keep the program running smoothly. In last two years, we added a recap video of program and event photos from throughout the year, and included interview-style videos of our board and committee chairs talking about what they love about being a REALTOR and/or being a member of the association. Finally, we have segmented our members into various groups so we can offer personalized, tailored invitations to attend the annual meeting. For example, we send hardcopy VIP invites for high-level donors, board members, committee members, and award recipients. We send tailored email messages for the remaining members, segmented by type of membership. This may sound complicated, but **once the system is established you should be able to execute easily between your membership services person and communication department year after year.** The return on your time is well worth it!

Policy Manual

Our association provides a multiple listing service for a real estate database that we oversee. Our members agreed to specific rules and regulations to use this service that lives in our association policy manual. It's admittedly a very dry and boring document. Rates of violations were increasing every time we did an assessment.

As a communicator, that told me that the policy in its existing format was not being consumed. The content was valuable but the format was not engaging. How could we take this policy and revamp it into bite size pieces of content that will grab attention so members won't be subject to fines and violations? Working with the head of that department, we developed nine different ways for our members to access this piece of content. It took two years.

First, we wanted to create a visually pleasing guide. The marketing department broke each section down into one to two sentences. In terms of graphics, we put light bulbs next to the things we wanted people to remember and warning signs next to the items that we see the most frequent violations on. **It was all laid out in a beautiful and easy-to-read format, both digitally and physically.**

Once we had the simplified version of the document, we broke it down further into one-page white papers for each policy. It was a text version set up like a guide with step-by-step instructions and screenshots of the system. Another method we used was the ever-popular video, creating ten clips under 2-minutes, featuring the head of department explaining the policy and giving specific examples of questions members might have about it.

We released those recently, and are seeing huge viewership and engagement so far. The first video got 200 views in a week and our members were sharing them on social media. Considering we have a membership of a thousand, it was gratifying to witness that instant response.

And The Blog That Never Was

I had the idea to start a blog for our members. The goal was to host it on our website, make it mobile responsive and available to anyone. It was an opportunity to take the guides and white papers created by our committee and making them easier to use by freshening them up and adding some graphics.

It took some time to create and we were excited to publish it. **However, we quickly learned from early feedback from our members that they did not favor those resources being searchable and available outside of the association.** We discussed it as staff and realized our members were right. This was their content that they created, and a blog was not achieving what we had hoped. They felt the value was being diluted. It was taken down and the white papers stayed on our intranet. **This was a lesson in listening and letting go.**

From the Chat - Where to Begin the Revamp?

When the desire to revamp and revitalise stems from issues we face.

"5 whys is about root cause and making sure that you are focusing on the problem and not symptoms of the problem."

— Alice Strachan —

"I think exclusion is one of the biggest issues facing 501c organizations today. If we are supposed to be coming together why do we build silos, walls, etc.? It even translates to events. Working to make everyone feel like they belong is an effort that has to be undertaken by each one of us."

— Cecilia Sepp —

03

QUICK AND EASY TIPS FOR REVAMPING YOUR ASSOCIATION

Make your work more effective one project at a time

BY MARY BYERS

Revamping can revitalize and grow all aspects of your organization. There are unlimited ways that the concept of revamping can be used in the association arena. However, it comes with risk and uncertainty. To help you prepare for this process, I have compiled a checklist of things to think about as you embark on any kind of revamp.

Start small, think big

Sometimes a small change can result in a big result. Think about revamping information into bite-size pieces. Change management experts always encourage people to focus on the quick wins: find something small that you can change quickly. You'll hit it out of the park, and that makes it easier to tackle bigger, more difficult tasks later.

Center member need

One of our strengths as associations is playing in the space where our members live. They are the subject matter experts, often working in different forums and sections of your industry. Part of the challenge is being relevant across the spectrum. The business intelligence piece of that is thinking about what your members need to succeed. How can we help equip them to do better at what they do? **What can we do that they cannot do themselves?**

Adapt what worked elsewhere

Revamping takes energy. All of us are on deadline and as soon as we finish one project we have to dive headlong into another one. It's easier to just pull

out last year's agenda, process or format with a slightly altered look, instead of revamping. **Adaptability is key. What have you seen work elsewhere?** Take it and tweak it so that it fits your culture and organization. There are ideas that wouldn't work well in one organization that would work wonderfully for another organization.

Get people on board

Be careful about how you communicate revamping processes to volunteer leaders. Do you have the green light to spend this money? **The bigger the project, the bigger the potential impact or controversy.** The faster you try to execute it, the more suspicious people will be. Ensure buy-in all round before you begin, and take the process at a steady pace.

Prepare to fail

It's important to go into a revamping project understanding that it might not work, or that if it works now it might not continue to work. **Revamping means learning to let go of what is no longer serving you.**

And finally, it helps to think about things as a work in progress, always. **Revamping is an ongoing project that will never be truly finished, so enjoy the process!**

From the Chat - Reflecting on Tools to Benefit the Revamp

"Your staff can do videos too. They don't have to be done professionally, sometimes 'amateur' video is more real and likely to connect with an audience."

— *Harry Rothmann* —

"I am quoting a good friend, Michael Butera, "People don't like data because data challenges traditional beliefs."

— *Meena Dayak* —

04

TRUST IN DIVERSITY: HOW TO MAKE PEOPLE FEEL WELCOME

Invigorate your events by inviting new perspectives to the table.

BY DANIELLE DURAN BARON

Revamping has become a buzzword. Everybody wants to be different and do something that will make them stand out. This applies to all aspects of association culture, including diversity and inclusion. How can associations go from talking the talk to walking the walk when it comes to inclusion, at their events and in all aspects of their culture?

If you tap into the same resources - i.e. go back to the same people - every time you plan an event, you will ultimately produce a new version of the same thing. The packaging might be different but the content will not change. When you want to do something new, the first thing you need to do is to **bring in different perspectives and people who will in turn bring in their own networks.**

It's not complicated: people just need to know that they're welcome, that their opinion matters, and that their suggestions are valuable.

At one event I helped organize, we produced a program book including information and images. One year, the cover picture was the silhouette of an African-American woman with the backdrop of Baltimore City, where the event was taking place. It generated a big buzz. **People could see small changes happening in a concrete way and wanted to help push it further.**

One of our dear members and panelists was particularly interested in supporting our diversity and inclusion efforts. We opened the door on ways she could help and it was enough to make her feel validated in offering her opinion. We needed to fill some sessions and she referred to her network, who felt that we meant what we said and that their voices were going to be heard. That trust brought new people in.

For another event I helped organize, we overhauled the dynamics simply by listening. A participant responded to a feedback survey saying that while she'd enjoyed the conference, all the panelists were men, and most of them were white. **It didn't sit right with her not to see people of color or women in speaker spots.**

Some people are quick to dismiss this kind of feedback. They might say that they would love to have people from these demographics at their event, but they can't find them. That makes me wonder: where did you look? **Did you extend your search outside of your inner circle?** If you look among the people you know for speakers and panelists, they will probably look a lot like you.

Instead of paying lip service to diversity and inclusion, bring in people of color and bring in women and make all of your members feel represented. You create a bond with people when you bring them in. **If you already have a relationship with someone and invite them to come on board for an event, they're in step with your work;** rather than inviting someone you don't know out of the blue and making them wonder why you reached out to them at all.

The more diversity you bring in and the more inclusivity you foster, the greater an audience you're going to be able to reach. By listening to your audience, you can revamp your events to give attendees more of what they want to see. With research to back up changes and transparency along the way, **revamping goes beyond the ideas of individual staff and starts being about delivering on promises to members.**

From the Chat - The Overwhelming Acceptance of Failure!

Again and again, experimentation was discussed in light of learning from mistakes.

"We spend too much time beating ourselves up over failures instead of learning from them."

— Brian Calvary —

"Talking about failure is really hard to do, and it's difficult to be vulnerable enough to say that the effort was a failure vs that it's the person who failed."

— Hilary Marsh —

"Failing is winning...you learn so much when you fail."

— Jennifer Wickline —

"Failing is learning."

— Harry Rothmann —

"The only people who don't fail are the ones who don't try anything."

— Cecilia Sepp —

05

HOW TO REVAMP YOUR HIRING PROCESS FOR A BETTER CULTURE

This association experimented with new ways of identifying talent.

BY ADDY KUJAWA

At the American Alliance of Orthopaedic Executives, we have a small staff that we have been slowly growing since I came in as CEO nine years ago.

A small group can provide an opportunity to create an organic and consistent culture, with fewer people to consider, hiring new staff to fit into our ideal culture became more of a conscious concern as we grew.

We realized that we were struggling to find people to fit the culture we all wanted to create. Often we would come across someone and they'd be a great culture fit but lacking the skills that we needed. I always believed in hiring for personality and teaching the rest, but some skills are critical in a role. You need to know someone's capacity before bringing them on board.

It was time for a revamp of how we sought out new staff. **How could we account for both required professional skills and a good culture fit when filtering through applications?**

Instead of using a typical position description, we switched to simply outlining our objectives, required interests and skills, and our culture. People respond to that with a cover letter where they can tell us what they would bring to the position, culture and company. From there we get first interviews and arrange phone conversations between the prospective hire and the person they will be reporting to.

The next round is a test or exercise that we put together collectively. This gives the interviewee a chance to demonstrate their ability to complete core tasks of the role. To close it out, we hire as a team. **A team interview with a staff of ten is a lot but it can be really fun if you're open to it!** We conduct them virtually when necessary.

The experience has been great. When we bring people in, everybody feels very invested in their success, and getting them onboarded and trained well. Together, we help them build their career path within our organization.

Revamping any association process can seem like a long and hard road, but it doesn't have to be. Tweaking something small can make a big difference to your association culture. There's no such thing as too small in revamping. **Look at a piece of the problem and see where it goes from there.**

From the Chat - Creating an Environment to Foster Change

Which environment characteristics can make change more effective and relevant.

"Sometimes starting with something small first...can create an environment for more change."

— Jennifer Wickline —

"I usually try a shorter timeline for implementation so you have research and a plan but get out there quicker. Definitely can create pressure but pressure creates diamonds."

— Cecilia Sepp —

"Listening at the edges is also important. What you learn over a drink with a member at a conference can speak more than survey results sometimes."

— Meena Dayak —

06

FURTHER RESOURCES

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

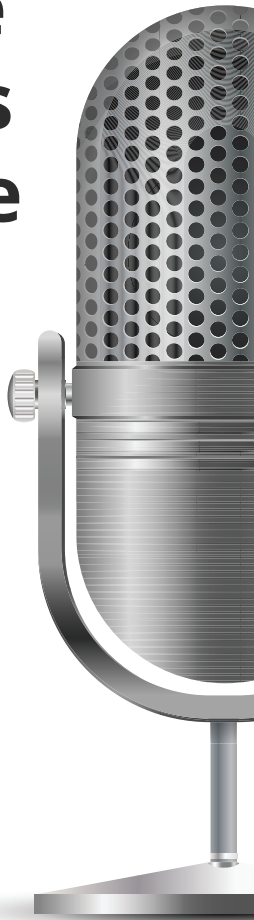
- [Article](#): Diversity Doesn't Stick Without Inclusion
- [Article](#): The Difference Between Diversity And Inclusion And Why It Is Important To Your Success
- [Article](#): The Daily Show's Secret to Creativity
- [Article](#): The Secrets of Staying Power: How the best brands came to be recognized around the world.
- [Guide](#): MLS Policy Quick Guide Reference Example
- [Tax Help](#): Best Practices for Tax IDs in the MLS System
- [Article](#): A Rebranding Strategy to Ensure Future Success
- [Video](#): Effective Meetings: Level 10 Meeting for Entrepreneurial Leadership Teams

Attendee recommended:

- [Website](#): Canva: A graphic-design tool website
- [Platform](#): Tableau Software is a software company that produces interactive data visualization products focused on business intelligence.
- [Product/Service](#): Watson Assistant: Natural language processing for advanced text analysis.



How Can We Solve Industry Problems Through Collective Knowledge?



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