CREATING A CULTURE OF SUCCESS

A COLLECTION OF INSIGHTS
FROM SURGE OPTIMISM

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2018
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, *Creating a Culture of Success*. 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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FEATURED SPEAKERS

Rhea Steele MS, CAE

**Chief Operating Officer,
Council for the Accreditation of
Educator Preparation**

Rhea uses her strategy, governance, and facilitation expertise to build high performance teams that anticipate business needs and deliver against organizational goals. An action-oriented leader, she ensures her team works across the organization to carry out mission-centric projects and stay on the lookout for opportunities to improve processes and policies. She uses her more than 13 years of experience in associations, non-profits, education, and museums to cultivate a dynamic, transparent, and inclusive culture. She graduated from the University of Colorado with a bachelors in Fine Arts and Anthropology and a masters in Museum and Field Studies.

Mike Moss CAE
President, Society for College and University Planning

Mike Moss, CAE, is the president of the Ann Arbor based Society for College and University Planning (SCUP). In collaboration with the Board of Directors, he is responsible for providing leadership and vision for the organization and guiding the development and implementation of the strategic plan, programs, policies, and practices of the society.

SCUP develops individual and organizational planning capacities to strengthen and transform institutions of higher education. Integrated planning is a sustainable approach to planning that builds relationships, aligns the organization, and emphasizes preparedness for change. Integrated planning engages all sectors of the academy—academic affairs, student affairs, business and finance, campus planning, IT, communications, and development. It involves all stakeholders—faculty, students, staff, alumni, and external partners.

Prior to SCUP, Mike served as chief operating officer for the International Facility Management Association and senior director of operations and education at NACE International. Mike's past positions have provided him with a broad range of experience, from organizational design and strategic planning through certification management and member relations.

Sarah Sladek
Founder & CEO, XYZ University

Sarah Sladek is a best-selling author, speaker, and CEO. Since 2002, her life's work has been dedicated to helping organizations engage future generations of members and talent. As the founder and CEO of XYZ University, Sarah has grown a culture-focused company comprised of generational researchers, presenters, and strategists. XYZ U has helped hundreds of organizations grow membership and reduce turnover among younger generations. As a leading researcher of generational insights, Sarah has authored more books and research papers on the generational topic than any other consultant. In addition to being an author, Sarah is co-founder and producer of the Millennials to Members online course, the first interactive curriculum designed to help associations develop an engaging, future-focused membership strategy. She's also founder of the RockStars@Work Conference, the nation's first business conference focused on bridging talent and leadership gaps in the workforce.

Sarah's expertise has been prominently featured in international media, and she has keynoted events worldwide. Backed by years of experience and supported by solid research, Sarah remains committed to helping organizations engage every generation to thrive and prosper in the new economy.

Kathija "Kat" Mohammed
CHO, CHIA
Director of Education, AAHOA

Kathija "Kat" Mohammed is a true advocate for education and is currently the Director of Education for the Asian American Hotel Owners Association (AAHOA). Kat has been the head of Education Department since its creation in 2016. She works to education hotel owners across the US with both in-person and digital education.

At the young age of 15, she started her managerial career as an Assistant Manager in a cookie shop in the local mall. From there, Kat has held various leadership positions of which she has a proven record of meeting and exceeding expectations. As a modern day nomad, she has gained valuable insights and life experience by moving 33 times in her life, with a few more moves on the horizon. Kat lives and breathes by the golden rule and has woven it into her leadership and training styles.

Kat continues to follow her passion to educate and hopes to positively impact as many people in the world as possible.

Kat is a lover of life (and chocolate), is wife to David, and mother of Nyla. She graduated Summa Cum Laude from Ramapo College of New Jersey with her degree in International Studies, Anthropology, and Sociology.

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WILL YOU TAKE A GRASSROOTS OR EXECUTIVE-LED APPROACH TO CULTURE BUILDING?

The key to impacting culture as leaders lies in purpose and accountability.

BY RHEA STEELE

Organizations becoming more intentional about how they create and sustain their culture; realizing now what a fundamental impact in has on employees' ability to be successful. For the purpose of this article, I define culture as the traits of the organization played out in the behaviors of all employees.

In my association career, I've approached culture design from a variety of vantage points: as an executive leader working across the organization, to an informal leader working on grassroots change. I've seen wonderful successes and brilliant failures from all vantage points. Changing an organization's culture is different than other types of organizational change (think implementing a new timecard system) because the change touches on people's values - the things they hold most dear. **In order for the change to stick, it has to be grounded in the true values of the employees and volunteers** and owned in such a way that employees feel personally compelled to hold each other accountable for reinforcing the culture.

At one organization, we worked closely with the board to build a collaborative and symbiotic culture. We held their priorities as our priorities and they committed to aligning the work of the organization to the strategic plan. **Among themselves, they were also intentional about cultivating a culture where discourse, equity, and data-driven decision making were valued.** As a result those values made their way into the day-to-day work of the organization work, resulting in a very positive impact on the culture.

In another organization, the most successful strategies were tied to accountability and common understanding. This organization worked on culture from the executive leadership level. We made sure that we, as leaders, had a common understanding of what we wanted the culture to look like, and what behaviors went along with that. We focused on accountability by holding each

other accountable to displaying the behaviors we were looking for. At times, this involved calling each other out publicly for out-of-alignment behaviors. **With our teams, we had regular conversations celebrating "culture-positive" behaviors when we saw them and addressing "culture-negative" behaviors immediately.** The repeated communication and reinforcement helped everyone practice what we were preaching.

The culture of an organization is shaped by the worst behavior a leader is willing to tolerate.

— Gruenert & Whitaker —

I discovered the "executive-led" approach wasn't the only way to align culture with purpose. In another organization, some of the best ideas grew from the grassroots. The organization intentionally valued the fresh perspective of those new to the organization, asking questions and encouraging them to apply solutions in a very different way. Employees at the grassroots level were intentionally engaged in discussions about the design and and implementation of the culture - and at times took full reign over task force activities. As the executive leaders relinquished control, employees at all levels engaged and took greater ownership of their role in supporting the culture we were building.

The culture of an association is instrumental to achieving organizational goals and meeting the current and future needs of members. **Will you take a grassroots or executive-led approach (or some combination of both) to culture building at your organization?**

From the Chat – What Challenges Does Workplace Culture Face?

When an organization has multiple priorities, culture has to be flexible.

"How do we convince ourselves that culture is a real work tools that's as important as technology, strategy, etc?"

— *Reggie Henry* —

"Some associations value the expertise of staff members more than they value staff members' being part of the association's culture."

— *Bruce Rosenthal* —

"Thinking of the Google example of good culture - Google publicly displayed some cracks in their culture as of late. The takeaway is that culture is a very fluid thing that needs constant attention to remain healthy."

— *Rick Rutherford* —

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MAKING CULTURE HAPPEN: A PRESIDENT'S PERSPECTIVE

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What role does governance play in shaping organizational culture?

BY MIKE MOSS

There's a running joke that when the boss is away, people are their true selves. How can leaders and culture curators capture that organic atmosphere and provide an environment where people can be their true self in service of the organization? It's not from sitting behind a desk with the door closed on conference calls for eight hours. You need to see it in its live environment, not only from survey results.

The executive director is the champion of what the staff needs and requires to be productive, happy and service-oriented. They also play a part in the prioritization of culture, but they won't shape it alone. Culture in action starts with your staff, informed by the members and supported by the senior leadership. They interact with the members the most: they hear complaints and compliments, they hear what's working and what's not in their association and in the workplaces of members. Defining the best work environment can start from the inside out. It is the executive director's job to communicate this to the board, and own it, fund it and live it.

Good workplace culture is not an outcome that just happens – it has to be a strategy of the organization. Associations are behind as an industry, only just turning the corner from lip service about culture to intentionality and support. We are underfunded. We are under resourced. But I'm optimistic.

Culture needs to be funded, and is therefore profoundly impacted by governance. A lot of associations are being held back by boards who haven't made culture a strategic priority. Our governance is culture. It's an inside out operation: how we interact with our members or potential members, with other organizations and with partners. That culture is defined not by a set of written doctrine but by personas and behaviors that we define, support and embrace collectively.

SCUP, where I serve as president, are in the middle of a cultural reformation. We've written nine culture priorities. My job is to challenge what comes up and work out what resources are available. I ask a series of questions to delve deeper into the ideas. It isn't my job to define them, but to guide our capacities and capabilities. I am an alignment mechanism in these discussions. Are these priorities aligned with our strategic plan? The sparks are driven by the staff.

As a result of the staff's effort, we now have a very friendly and welcoming culture. We allow dogs to come to work. At any given moment, there could be three dogs walking around the office and it's very calming. They're not a distraction, no one's allergic, and we all look forward to seeing our tail-wagging office mates. With the success of this small change, we are now exploring other avenues that allow us to have the balance of fun, productivity and service.

From the Chat - Aligning Perspectives on Culture

Who gets to set the tone?

"There's too big a disconnect between culture desired and culture in practice in some organizations."

— *Dennis Sadler* —

"We need to keep in mind that all organizations have multiple cultures. There is a staff culture, a board culture, and a member culture. Each culture is going to be different because they serve different purposes and different groups. That being said: staff can be innovative while a board might be traditional because they find the place they agree. The starting place for alignment is the mission."

— *Cecilia Sepp* —

"The staff are the champions of good customer service, therefore culture has to support and nurture that objective."

— *Rick Rutherford* —

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MORE THAN JUST A TREND

Are associations doing enough to create their ideal culture?

BY SARAH SLADEK

Culture has become a hot topic as of late. It affects our workplaces and, in associations, it affects our membership. We have experienced a culture shift. When I was researching my book Talent Generation, one of the main conclusions I came to was that we have been operating for quite some time according to a 20th century mindset: this idea of hierarchy and structures and processes and people keeping jobs only because they need the work. Now we're shifting into this 21st century mindset - a little bit behind the curve, but we are catching up.

In this century, people want purpose. They want a job that means something to them. They want an experience. The more we explore what kind of culture matches this desire, the more we realize that culture determines our organization's success.

In the for-profit world, Google is renowned for having an exceptional workplace culture. **Google as a workplace is known not for what it does, but rather for what it stands for.** Its principles define its culture, and of course it is one of the most successful companies in the world.

Some readers might be thinking:

"We're not Google, we are an association. We can't be innovative and intentional about culture while we're dealing with things like Capitol Hill and government and hierarchy and bureaucracy."

Is that really holding associations back from thinking about culture? There's room for opportunity here and we're busy making excuses. I have heard associations

get into debates about who is ultimately responsible for the culture. Is it the leaders, the members, or someone else entirely? This too can be a form of derailment in the culture conversation.

Research from the corporate world shows that the top 10 percent of companies, ranked in terms of performance and success and employee engagement, have cultures largely driven by leaders. Those leaders demonstrate that they care about the company and set policies and practices in place. They set the tone and then get the team on board with it. **In associations, it's convoluted because we have these tug-of-war power struggles between boards, leaders, staff, volunteers and members.**

It's important that associations rise above this and pay attention to what is establishing their employee culture. Knowing that will influence membership experiences and membership culture, and help you get a handle on changing what needs to be changed.

A millennial wrote a [letter to the editor](#) at a national publication a couple of years ago that generated a lot of controversy. She wrote:

"Don't confuse culture with collateral. Yes I am a cash strapped millennial who appreciates free lunch. But I don't wake up at 6am everyday to play foosball in the breakroom. I need to be surrounded by people who are on fire for what we're doing. I need a manager who is motivated to push boundaries and think differently. Working in a cool office is awesome. So is free lunch but a purposeful culture is more important. A culture of purpose drives exponential growth."

Benefits are often great and meaningful things, but are they enough? **What about the purpose of the people I'm working with?** Associations have tremendous purpose and they're doing tremendous work. Capitalizing on that and communicating that effectively is key to attracting passionate staff who will thrive in a strong culture.

Our industry is constantly changing and it's anybody's guess what's going to happen in future. And yet, there are cues that are telling us what we need to aim for. **Start by creating a culture of success.**

From the Chat – Hiring With Culture in Mind.

Have you considered how diversity plays a role in a successful workplace culture?

""Culture Fit" is tricky - watch out for it being code for discrimination and/ or enforcing a monoculture. This coding can even be overt, or completely unintentional, but in either case it can be a way for unconscious bias to affect hiring decisions. Luckily, there are tools and services that help counteract our unconscious biases, such as removing names from resumes, blind interviewing, and even voice processing that disguises a candidate's gender. Diversity is not only morally and ethically imperative, but it has been proven time and again to contribute to strengthening and organization. Make sure to have diverse backgrounds and viewpoints as a cornerstone of your organization's culture."

— *Gordon Withers* —

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WHAT DO YOU NEED? CULTURE AND LEARNING THAT LOOKS DIFFERENT FOR EVERYONE

Looking to improve organizational culture? Ask staff what they want.

BY KAT MOHAMMED

Staff culture is something I handle on a daily basis in my role as a Director of Education. We facilitate professional development for hotel owners and I find that across the industry, regardless of your role, culture ties into everything you do. It's the tone you set for the workplace attitude - from how you interact with one another to your performance as an individual staff member.

Why isn't culture a mainstream conversation for associations yet? Two of the greatest challenges are budgetary constraints and manpower. I have not experienced an association where one person has one person's worth of a workload. There's always a need for extra people and budgetary constraints limit solutions. The same challenges apply to professional development, which is intertwined with staff culture. There is added value for the association when you develop staff by enhancing an employee's potential to improve job performance. Additionally, it benefits the employee by increasing her/his human capital and sends a message that the employee is valued.

If you are in a leadership role, learning what your employees need will help you figure out how to grow and improve your culture. Often it won't be unrealistic or beyond your budget. Sometimes we assume we know what's best for our employees, when really we should be holding one-on-one meetings or conducting surveys to get to know them better. From the outside, boosting morale might look like having donuts every Friday in the breakroom. If you ask employees what they want to see, the answer could be totally different.

Staff can identify areas where they need to develop professionally. They can see the changes coming up for the organization and industry and know what additional tools will get them to where they need to be. Leadership can step in to support that, either financially by paying for training or by allowing staff the time to work on professional development. If someone who is managing multiple projects needs to step away from them for additional professional development, acknowledge that and don't berate them for needing more time.

Leaders can also celebrate the successes of training along the way. Professional development won't always happen internally. Instead of gathering everyone in a room to watch a webinar together, you could give each person 30 minutes a week dedicated to personal learning relevant to her/his role.

Consider offering individualized rewards to recognize staff achievements. Once you get to know your staff, you may find out that some employees go to Starbucks every day so they will appreciate a Starbucks gift card. Others may appreciate a *Bring Your Dog to Work Day.*

Maybe your younger staff (and members) want learning opportunities more than they want perks. Our board has two seats specifically for young professionals. We also have a committee dedicated to this demographic and frequently survey young professionals at education events. We capture the ideas of that audience because in most cases, they will become the business's successor at some point. Why not try to get them involved right now? At our annual convention, we allow hospitality students and professors to attend at no cost to gain exposure and the opportunity to network.

There's huge value in bridging the gap between what staff want and what association leadership can provide, and it doesn't have to be expensive or a misuse of time. In the long run, everyone will feel the results.

From the Chat - The Intrinsic Motivation for Staff to Take Part

Peer to peer, what is in our control and what isn't?

"We can all play a role at our association to keep our team members motivated, inspired and support each other living purposeful lives - it's not an easy skill however, but warrants effort daily!"

— Susan Noell —

"The internal training is like music I think, you can't tell your friends to like a song but if it's popular they will listen to it to discover it on their own."

— Emery Wolfe —

"Mindset is something that's, no pun intended, always on my mind. It all starts there, because our mindset sets our direction, which sets our ideas, which sets our decision making and actions."
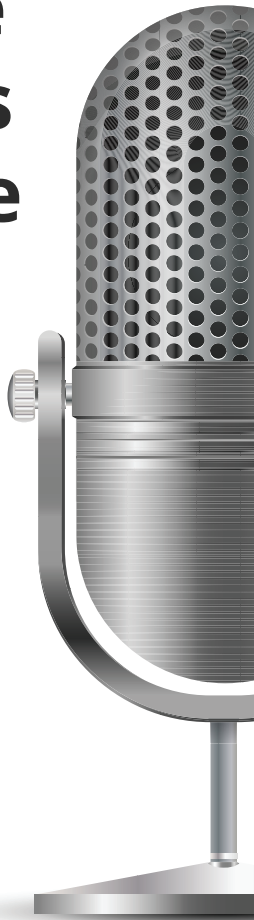
— Aldo Maragoni —

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FURTHER RESOURCES

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

- [Book](#): The Fuzzy and the Techie: Why the Liberal Arts Will Rule the Digital World by Scott Hartley

- [Chrome extension](#): Helps you get your tabs under control to increase productivity, reduce stress, and bring focus to your work.

- [Article](#): How Toxic Employees Affect Organizations