

# THE WORKFORCE CRISIS (AND WHAT TO DO ABOUT IT)

A COLLECTION OF INSIGHTS  
FROM **SURGE 2017**



**SURGE**  
2017

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# INTRODUCTION



**W**hat you're about to read is the result of an experiment in virtual collaboration. **SURGE 2017** assembled association professionals from across the globe to harness collective knowledge within a virtual summit of a completely new model.

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, one of the 12-part SURGE series, delves into the session, ***The Workforce Crisis (And What To Do About It)***. 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 2017 **event page** to watch all the sessions for free, at your leisure!

**SURGE**  
2017

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01

# FEATURED SPEAKERS



## **Bryan Kelly**

**B2B Marketer and Copywriter**

**Bryan Kelly** is the former VP of Marketing for Aptify and is now leading the “Community 2.0” charge as CEO of rasa.io. Aside from having the opportunity to combine his love of marketing and software into one really fun profession, Bryan enjoys taking long walks—seriously. A former recovering runner, he intentionally walks about 5 miles per day to stay healthy and get ideas flowing for the workday.





**Sarah Sladek**  
CEO, XYZ University

"Since 2002, my life's work has been dedicated to research, strategy development, training, and education to bridge the generation gaps that exist in organizations worldwide and engage future generations of talent. I founded the nation's first and only firm solely focused on this mission. XYZ University has an exceptional track record of helping organizations reduce turnover, grow membership, develop leaders, and seize market share among Generations X, Y and Z."





## **Scott D. Wiley**

**President and CEO at the Ohio Society of CPAs**

**Scott leads** a team of 40+ professionals that create and deliver innovative advocacy, education and business solutions for 85,000 CPAs and accounting professionals working in businesses of every size and sector across Ohio. Influencing the national policy agenda for the accounting profession is a top priority for Scott, who represents The Ohio Society of CPAs and the national association community on Capitol Hill. He does this through his active participation with the CPA Society State Executives Association and as Immediate Past Chair of the Board of ASAE. Scott is making a diverse and inclusive CPA talent pool a top priority in Ohio. He serves on The American Institute of CPAs National Commission on Diversity and Inclusion, and has increased funding for diversity recruitment initiatives through The Ohio CPA Foundation where he also is president. He holds a B.A. in Communications from the State University of New York at Oswego. He resides in Powell, Ohio with his wife Lynda and their Children, Caroline and Chase.





# GUEST SPEAKERS





## **Lisa Campo**

**Marketing and Communications  
Manager at ACTFL**

**Lisa Campo** is a professional curmudgeon who has worked in the association space since 2011. She began designing emails in 1998 as AOL was flourishing, and has been interested in email design, coding and analytics ever since. She loves dogs and hates word clouds.





**Daniel Pink**  
Author

**Daniel H. Pink** is the author of six provocative books — including his newest, *When: The Scientific Secrets of Perfect Timing*, to be published in January 2018. His other books include the long-running New York Times bestseller *A Whole New Mind* and the #1 New York Times bestsellers *Drive* and *To Sell is Human*. His books have won multiple awards and have been translated into 37 languages. He lives in Washington, DC, with his wife and their three children.





## Lakisha Woods

Sr. VP & Chief Marketing Officer  
at the National Association of  
Home Builders

**Lakisha Ann Woods**, CAE oversees all revenue-generating programs unrelated to NAHB's International Builders' Show exhibit space sales. She also identifies new business opportunities and handles NAHB branding and public image initiatives. During her 13 year tenure at NAHB, Lakisha has developed strategic marketing plans that resulted in up to a 300% increase in revenue for several products and services. Prior to joining NAHB, Lakisha was the Executive Director of Marketing and e-Business for the Associated General Contractors of America (AGC), where she managed the associations overall marketing efforts including the national and many local chapter websites. Lakisha is the current Chair of ASAE's Communications Section Council. She holds a Bachelors of Science degree from the University of Maryland in College Park and lives with her husband in Beltsville, MD.



# **SECTION 01**

## **OUR WORKFORCE CRISIS**

**03**

**ASK THE COMMUNITY:  
WHAT BROUGHT YOU TO  
THE ASSOCIATION SPACE?**

My wife has been in the space since we were high school sweethearts. Fifteen years ago her association had a tech need, they brought me in as an IT consultant and I haven't left since.

***Mark Kibble***

I answered a print ad in the Washington Post.

***Greg Melia***

I stumbled into this industry, and it was the best move I ever made.

***Susan Noell***

I was looking for a job where I could use my journalism degree. There was an opening for editor of an association publication. I stayed there for 36 years in various roles!

***Sherry Milligan***

I always wanted to work in public service or for a charity. I ended up at an association with a charitable mission!

***Matt***

After 9/11, I was a Veteran and no longer wanted to work in emergency management. My first boss, another Veteran, hired me and I haven't looked back! Thank you Russ McKinnon, CAE.

***Vivian Abalama, CAE***

I stumbled and bumbled. My background is in film and I was looking to leave. I started temping and slowly my skill set was needed more and more at the office.

***Emery Wolfe***

My friend worked at a good association and liked it, so when she moved I took her job!

***Heidi***

04

# ASSOCIATION CAREERS AND WHERE TO FIND THEM

**By Lakisha Woods**

“Whenever I meet someone new in the association industry, the conversation eventually comes around to how we started our career. Nine out of ten times, the answer is the same: by happy accident. It’s how I started and it’s probably how you started. **While it was one of the best decisions of my life, it was never a consideration when I was in school.**

“Why is association management not perceived as a career path when we begin our careers? We all love the freedom and creativity association work allows us, the daily unique challenges we face regardless of the industry we represent, and the rewarding sense of knowing we’ve helped our members or made a difference in society. These are all powerful messages, but people don’t know about this career option. Imagine the talent we could recruit and cultivate if everyone understood the rewards of working in this industry. **Let’s commit to showing the public and potential employees what we do, why we love it, and why they should consider a career in association management.**”

*AssociationSuccess.org took on Lakisha’s call to action and built a campaign highlighting the benefits of working in associations. We want people to reflect on and share the things that make this work worth it. So we asked the community: what do you love about working for associations? Watch to find out their answers...*



**VIDEO: Association Recruiting: People, Passion and Purpose**



05

# FIVE WAYS TO REPEL MILLENNIALS FROM YOUR ASSOCIATION

*When we consider the workforce crisis, we must consider the changing demographics of employees across the board. Today, millennials are the **dominant generation** in the US workforce, surpassing retiring Boomers and the Gen Xers before them. It's no wonder the media spends so much time trying to pin this generation down to a stereotype. From a professional perspective, what really motivates them? And how should associations go about recruiting them?*



Let's hear from millennial expert (and millennial!) Lisa Campo

**Millennials, born between 1981 and 1997, are taking the workforce by storm.** What kind of reputation do we have? Let's see: we're lazy narcissists. We don't want homes and we can't afford homes. We destroy every industry. Clearly, we're terrible at getting anything productive done. So instead of hiring us to work for your association, you should try to keep us out of it! Here are some ideas for you.

## **01.** Assume millennials are social media savvy.

To make us never want to work for you, assume we're all social media geniuses. Surely, everyone in their twenties knows exactly how to find the right social media management tool for you, create every channel and use them all effectively. They can teach everyone else how to do it too, even if it's not on their resume! We're just so good at it. We do it on our phones all day.

## **02.** Pay no attention to your online presence.

Ignore any websites where people get to review your company or your association, like Glassdoor. Especially when there's fifty reviews saying how your company is bad, there's no opportunity for advancement and the pay is low. Avoid! Don't even go on the internet at all.

## **03.** Invest in silly incentives instead of salaries.

How about a pool table or an Xbox? Millennials love stupid investments, because we are ourselves very stupid. No one will notice the measly size of their salary if they are distracted by incentives like this. Anything to keep us there longer hours and pay us less money.

## **04.** Don't invest in your employees' benefits.

Millennials love the gig economy, so we don't really care about healthcare or retirement. We don't want any help from you, we just want to go from gig to gig scraping to make rent every month. Paid time off, sick leave, bereavement leave - not necessary!

## 05. Avoid investing in professional growth.

Be sure not to hire and train good managers, either. We're happy to enter your association at the bottom rung of the ladder and stay there, where we belong. Is there even a ladder? We wouldn't know about the benefits of attending conferences, learning about our field or meeting fellow professionals at networking events. We're too young to understand.

**All joking aside: I love working for associations.** I love my current job and my boss. I love the benefits we receive. Millennials don't deserve to be denigrated - we want to be treated like anyone else. To attract younger employees, prioritize transparency, create a culture where everyone can succeed, offer benefits, and hire managers who are good with people. Talk to people about what they want. If you respond to your employees' needs, you'll start to see higher morale and lower turnover. **The worst outcome of all, you may even be punished with an office that represents a wide mix of age groups!**

## From the Chat: Millennials and Mentorship

*I love the idea of requiring committees to have X% of young leaders. Many "experienced" members will talk over our younger members, as they feel they don't know the necessary history and can't see the big picture.*

*-Kat Allison-*

*From my research on Millennials, they really crave mentors. **Mentorship might be a nice way to involve members in the association.***

*-Jack McGrath-*

*I like the thought of a **win-win situation** where each generation can use their strengths, experience, and needs to create a better association together.*

*-Marc Johns-*

*Older members need to acknowledge that there is much they can learn from younger people! **Beyond allowing younger members to have a voice, we can encourage them to be leaders in the organization and listen to what they have to say.** Younger members are seeking mentors, and the "experienced" professionals can serve that need. That way both benefit.*

*-Deb Rodney-*

Want to learn how to host your own virtual event, much like **SURGE 2017 ?**

**AssociationSuccess.org** is in the process of creating an online course that will walk you through the steps involved in putting on your own interactive virtual summit.

Want to be notified when the course is available?

**SIGN UP HERE**

# **SECTION 02**

## **THE WIDER WORKFORCE CRISIS**



# **A WORKFORCE CRISIS SURVIVAL GUIDE**

*By Sarah Sladek*

**We live in an era of disruption. The workplaces and career trajectories we took for granted in the past no longer exist.** Due to changes in technology, the economy, and changing needs of generations from Baby Boomers to Millennials, the shape of the labor force must be reimaged in order to survive. We need to look at the causes of skyrocketing turnover and declining productivity to save our industry. Where do we start?

**Visit the future and mind the gaps:** What will your industry look like in 2030? How will technology impact careers in your field? What will the workforce look like, based on current trends and projected data? Workforce development is a long game. Once you have identified what measures you may need to take to get to this projected future, take action and prepare now.

**Engage young people and potential professionals:** Instead of waiting for college students to come to you, think of reaching out to them, or even younger potential professionals, to welcome them into the industry and make it accessible to them. Engage with them and with the people who influence them: teachers, guidance counsellors, and parents. Industry professionals want to engage with young people, as a way of giving back and creating their own future.

**Use data specific to your association's context:** The same recipe will not work across the board. Analyze the data from your industry and work out how best to use it for the unique challenges faced by your association. What is best for your state or locality, for the shape of the future in your industry, and for current and future professionals? Consider how membership structures and dues play into this, and the ways you reach out to your community in person or online.



**Embrace change as a leader:** Leadership must be enthusiastic, optimistic, and willing to work with people who differ from them. Instead of being reluctant to try out new ideas because of finite resources, recognize that associations will always have finite resources and take the leap into new ways of working and collaborating with various generations of professionals. This takes a CEO who goes beyond their individual vision and surrounds themselves with a like-minded and excited team.

**Consider the legacy you want to leave:** How will the steps you take now benefit the future of your field? Associations can impact the workforce in a unique way. They alone have a bird's-eye view of what goes on in their industry. This omniscience can bring together employees, employers, members, prospective members, industrial partners and association professionals. Use that power of change and you will see the results reflected back in an increased and diverse membership at your association.



# **CASE STUDY: OSCPA AND THE SCHOOL TO CAREER TRANSITION**

*By Scott D. Wiley*

**"At the Ohio Society of Chartered Professional Accountants, we have implemented a business model that keeps the next chapter front and center.** We analyzed data from the US Bureau of Labour Statistics and found a forecast for significant growth in the need for auditors, analysts and management consultants between now and 2024. However, the number of high school graduates in the state will decline by 8% between now and 2023. We have to compete with an educational shrinkage on top of the brain drain to cities like Chicago, New York, and LA.

"Instead of waiting for college graduates to come to us, we have rolled out a high school workforce pipeline plan. We frame accountancy as an **opportunity profession**. When we reach out to high school students and the adults who influence them, we want to learn what stereotypes about our industry come to mind, and then turn those on their heads. People hear 'accountant' and think of taxation and auditing. What they don't think of is the growing advisory segment of the profession, and the cutting-edge technology that shapes the future of accounting.

**"To these incoming association members, we say: choose your own adventure.** Whether that looks like a career in public accounting, entrepreneurship, or the nonprofit sector, we emphasize the competitive starting salaries, high employment rates, and long-term earning potential of a career with us.

"We aim to create continuity for prospective accountants throughout their education. Our association steps in and offers young people in high school and college a complimentary membership. Such a membership offers a place on our email list, information about scholarships, and invitations to networking events open to students.

“Complimentary membership welcomes them in, providing an entry point into the community and profession. Up until three years ago we had around 2000 college student members. Today that number has more than tripled, to 7200.

“This workforce development plan pivoted the entire focus of our association. Without ignoring other new and existing projects, we have staff members dedicated to this area and a team working to support them. It has transformed our entire staff into an association of influencers. **It has positioned us as thought leaders, and elected officials and business leaders now turn to us for solutions.**

“Young people aren’t looking for miracles. They’re looking for you to find ways to help them feel part of something, and deliver opportunities that they can believe in. **Engage young people as part of your association’s workforce development plan, and secure the future of your industry.”**

## From the Chat: The School to Work Transition

*We have found that there are three linked gaps that need to be addressed: the skills gap, the exposure gap, and the opportunity gap. The skills gap begins with an exposure gap, because young people can't prepare for careers they don't know about or understand. The opportunity gap disproportionately affects underserved communities. Most young people have a very limited understanding of careers and know only about the typical careers (such as doctor, teacher, lawyer, and what their family and family friends do). People in underserved communities have a very small funnel of career information to learn from. **If young people aren't exposed to the opportunities available to them, they will never consider those careers.***

-Nick Hare-

*Association management should be a college major and a career path! **Students should be shown how they can progress in a career by working with a number of different associations and gain valuable experience with a variety of responsibilities.** Young association executives can impact professions and industries with their work for associations as every facet of life is impacted by associations and their roles in our society. Associations are located in geographically diverse places, but many are in or near state capitals and large metropolitan areas like New York, Chicago, Denver, Dallas, and Washington, DC so there are opportunities to work in some exciting and desirable locales for young professionals.*

-Jay Daughtry-

*Some health professions are represented in US high schools through a group called the Health Occupations Students of America. **It introduces them to many and various health professions.***

*-Sherry Milligan-*

*Associations need to become key influencers at the secondary education level. Waiting until college is too late for many of these young people. **It's hard to compete with the dreams of professional athletes, entertainers, etc. unless we mentor them at the secondary education level by providing real options for a great and meaningful career choice.** This calls for collaboration with local school districts to set up career events with people from a variety of associations.*

*-Rick Rutherford-*

*In North Carolina, we struggled when trying to get into schools to speak to students about careers. **Most schools wanted a referral from a parent that already had a student at the school.***

*-Kim Lawyer-*

*We are trained when we are younger to imagine that 'good at sports' means 'be an athlete', or 'good at maths' means 'be a mathematician' - rather than to think about what it is in particular that makes you good at, or enjoy, those things. Maybe you are good at sports because you are a great team player, or really focused and dedicated, or happy getting up early, or responsive to rules - so there are so many reasons why a different industry might be the perfect fit.*

*-Kate Robathan-*



# WHAT MOTIVATES US AT WORK?

*By Daniel Pink*



**“What motivates people to do great work, instigate breakthroughs and go beyond the ordinary?** In my book *Drive*, I look at fifty years of behavioral science to examine that very question.

“There’s a certain kind of motivator that we use in organizations. Psychologists call them controlling contingent motivators. I call them if-then rewards: **if you do this, then you get that.** Rewards get our attention. We like them. They are a great motivator for simple, short term work that involves following an algorithm or recipe, but beyond that, we need more. The universe of simple tasks is shrinking as we automate that kind of work, leaving more room for us to focus on the universe of complex creative tasks. How do we create a motivational scheme that is appropriate for it?

“Behavioral science gives us some clues. To start: you have to pay people well. **Money matters!** If you pay people fairly, they can focus on the work instead of worrying about their paycheck. After money, there are three core motivators for long-term focussed tasks: **autonomy, mastery and purpose.**



**“Autonomy is a sense of self-direction.** You can’t manage employees into engagement. Instead, build up the autonomy that they have over core aspects of their work. When people have more control over when, how and with whom they work, their engagement will increase.

**“Mastery is our desire to get better.** Improving on a skill is inherently satisfying. For example, people spend their weekends playing sports or musical instruments, not because it pays but because they enjoy getting better. In her groundbreaking research at the Harvard Business School, Teresa Amabile found that the biggest motivators on the job are meaningful work and making progress. The days people make progress are the days they are satisfied and loyal to the organization. Progress depends on feedback, so don’t let your organization be a feedback desert - give your employees information on how they are doing. Rewarding good behavior will get you more of it.

**“Purpose is knowing why you are doing a piece of work.** If you work for an organization addressing the climate crisis, the mission will provide a great sense of purpose. However, if like most of us you don’t have access to that scale of purpose, look closer. Are you making a contribution? Whether that’s to your coworkers, your boss, or your members, know that you are making someone’s day easier. When people feel like they’re making a contribution, they’re more motivated and they do better.”



# WORD CLOUD

What were the most discussed topics in the attendee chat? The more frequently a word was used, the larger it appears in this image!





# FURTHER RESOURCES

During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about the future of learning. We've compiled them into a list here. Keep on learning!

- [Book: Talent Generation by Sarah Sladek](#)
- [White Papers: Why They Quit and Ready or Not: Here Comes Z](#)
- [Article: "Xennial" and Renaming Generations](#)
- [Article: White Collar Apprenticeships](#)
- [Panel Discussion: Modernizing Work and Learn Pathways](#)
- [Article: Reverse Mentoring](#)
- [Article: How Associations Can Make a Match with Millennials](#)
- [Video: Teresa Amabile's Progress Principle](#)
- [Book: Drive by Daniel Pink](#)
- [Article: Association Careers: It's an Adventure!](#)
- [Video: Why do you love working for an association?](#)
- [Article: 5 Ways to Make Your Membership Organization a Magnet for Millennials](#)

