



Talkin' 'Bout Our (Multi)Generation

By Candice Warltier

The Wasted Generation: Even millennials think they are self-absorbed and lazy, claims study (DailyMail.com)

Baby Boomers: America's Hottest Group Of New Entrepreneurs (Forbes)

Millennials: The Me Me Me Generation (Time Magazine 2013)

HOW THE BABY BOOMERS DESTROYED EVERYTHING (BOSTON GLOBE)

Confused by the headlines about our newest generation of members? If you are an association executive what are you to believe? Millennials have been characterized by Time Magazine as “lazy, entitled, selfish and shallow” (May 2013). Others describe them as technologically savvy, civic oriented, entrepreneurial and compassionate (Lucky Attitude Marketing Consultancy). Compare this to the characterizations of baby boomers: ‘hard working, self-assured, competitive and team oriented’ (eLearning Industry’s Network).

So, what are the REAL characteristics of each generation, and do associations need to define generation-specific attributes in order to reach their members? We spoke with three leaders in the association industry to find out.

To Segment or Not to Segment

According to Tony Rossell, Senior Vice President, Marketing General Incorporated, baby boomers were historically connected with their associations through three main areas—products (books), volunteer opportunities and insurance. These three priorities are now at the bottom of the list, according to the 2017 Membership Marketing Benchmarking Report. “If associations are still focused on these priorities, then they may be really struggling with membership,” said Rossell.

This is especially important as many associations do not track members’ ages.

“We often don’t have birthdates, so don’t know the ages of our members,” said Stephen Fox, Vice President of Membership and Constituent Relations, American Nurses Association (ANA). “We pay more attention to tenure and membership in their profession and then make assumptions about age.”

ANA is taking a different approach when reaching their membership. “We are not approaching this generationally,” said Carol Cohen, Director of Membership Development, American Nurses Association. “We have really done a lot to target new RNs in new member acquisition and how we serve people with products and

services—new RNs aren’t always young because nursing is often a second career,” said Cohen.

Through surveys and focus groups, the American Veterinary Medical Association (AVMA) is keeping a pulse on their diverse membership of more than 89,000 professionals. While all AVMA members are veterinarians, they practice in varied disciplines such as companion animal medicine, food animal medicine, industry, academia, laboratory animal medicine and aquatic medicine. The AVMA understands that each of these membership segments face different professional demands and therefore have distinct needs and expectations from their professional association. In addition to targeting members through their specific professional discipline, the AVMA is now segmenting members by behaviors and values.

“Our members’ needs are constantly evolving and our profession continues to face new challenges and opportunities. That’s why we are committed to listening intently to our members and understanding their challenges so that we can continue to build on the AVMA’s core strengths, become even more responsive to the needs of our members, and advocate with a strong, clear voice on behalf of our entire profession,” said Janet D. Donlin, DVM, CAE, Chief Executive Officer, American Veterinary Medical Association.

Similar to ANA, the AVMA recognizes age is not always the most relevant factor. Younger members may be more inclined to engage with them through digital communications, but that goes beyond Millennials. The AVMA professionals

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Recognize Unique Circumstances? Recognize Members' Stage in life?

For many associations, there are unique challenges depending on where their members are in their profession.

American Nurses Association is the potential home for a potential 3.6 million nurses, so they do not have the luxury of only serving the needs of a small group. To move from a one size fits all approach, they created new lifestyle segmentation within the organization—new RNs, nurses who are 5 to 14 years in their career and those members who are more experienced leaders.

For the AVMA, newer professionals face a very unique set of challenges, which include securing a position that fulfills their early career and professional development needs as well as the ability to pay their student loans.

“Those professionals who are coming out of veterinary school or recently entered into the workforce need information, support and resources around topics like career development and financial literacy,” said Dr. Donlin. “The AVMA created a new position, Assistant Director for Recent Graduate Initiatives, dedicated to outreach and programming for early career veterinarians,” she added.

For older professionals—boomers, specifically—the AVMA sees a group with completely different concerns. They may face the challenges that come with owning or running a practice.

But there are challenges that veterinarians of every generation face on a daily basis. “We have seen an industry spike in compassion fatigue, depression and stress from financial issues. To help, we are working on educational materials and resources to support veterinarians overall

well being and help them cope with the emotional demands unique within the veterinarian profession,” said Dr. Donlin.

Give Them What They Need

Marketing General Incorporated sees a number of trends related to association success. The number of associations using digital marketing has increased, specifically online advertising and content marketing. “Younger people have a tendency to use social media more. You can build a relationship with them and really target a demographic through social media,” Rossell added.

ANA created an active Facebook direct advertising program about 4 years ago. “We looked at people who were joining online in response to Facebook ads and found it was weighted much more heavily toward younger people than our membership as a whole. Our membership used to skew older; now we are starting to skew younger based on Facebook metrics,” said Cohen.

Successful associations were also found to offer young professionals membership at a lower price point—discounts to entice professionals to join.

ANA embarked on a new member acquisition campaign offering 50 percent off the first-year dues for people who were new to the profession. Additionally, they developed an online community for new RNs moderated by a more experienced professional. They are also revamping the mentorship program.

The AVMA's Early Career Online Community has proven of great value to engaging young professionals. The closed Facebook group is a community exclusively for recent graduates to connect with others facing the same transition from veterinary student to working veterinarian. The AVMA also hosts an online chat on a different topic (such as veterinary economics, wellness, leadership, and more) almost every month.

While many associations are concentrating resources on reaching a younger audience, the AVMA understands the importance of continuing to meet the needs of their experienced members. Many are now thinking about the next phase in their career, which includes retirement. The AVMA is providing them with the insights, tools and resources to navigate their careers and livelihoods. For many, these challenges extend to their personal lives, including managing the personal healthcare for themselves and their families.

The AVMA's insurance trust, AVMA LIFE, addressed this challenge head on by retaining a member advocate. "Since many of our members take advantage of the insurance coverage offered through AVMA LIFE, the member advocate is there for those who feel they need assistance with helping to navigate the increasingly complex healthcare system. They are on hand to help members with better understanding the health plan choices available to them, complex/confusing bills, coordinating with Medicare and more," said Dr. Donlin.

Consider What's Next

Successful associations don't stop at maintaining status quo. There is an ongoing need to identify innovative ways to reach new audiences. ANA has developed a student subscriber membership category. Nursing students can obtain a free student subscriber status if they are a member of the National Student Nurses Association. "These students become a funnel for ANA because we already have developed a relationship with them when they graduate," said Cohen. "They receive a digital "Welcome to the Profession Kit" that helps them with finding a job that is available to students nearing the end of their education," she added.

"Associations that focus on letting people engage with them when they want, where they want, and how they want will be more likely to grow and thrive and probably keep younger members," said Rossell.

However, according to Rossell, associations should think twice before giving up traditional tactics, like mailing publications and renewal notices. "While there is a trend away from paper toward electronic communication, what I have

observed is that when an organization stops using tangible marketing and communications vehicles, we typically are seeing lower retention rates," he said. "At least, do not go cold turkey on stopping—chances are you will see a drop in membership." 

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"Millennials and Memberships," a research study (March 2017) conducted by QNA Group

The study included 701 Millennials (born between 1982 and 2000). The study looked at both younger Millennials (born between 1989 and 2000) and older Millennials (born between 1982 and 1988).

- Nearly three-quarters of respondents stated it was "important" to "very or extremely important" to continue to be a member of their most valued organization.
- More than half (59%) of older Millennials find highly personalized experiences "very necessary" for an organization to provide.
- Twenty-nine percent of older Millennials said they are interacting on a daily basis with member organizations compared to 19 percent of younger Millennials.
- Younger and older Millennials alike (78 percent) find personal development/growth to be important in terms of what any membership organization provides for its members.



Digital Extra

To access the full *Millennials and Memberships* research study by QNA Group, access the digital or mobile versions of *FORUM*.

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A Conversation with Dr. James Pogue

Dr. James Pogue is a nationally renowned speaker, multi-generational expert, entrepreneur, national champion martial artist, musician and military veteran. He has researched and presented on the integration into the workforce of Generation X, Millennials and now Generation Z. He was the keynote speaker at this year's Forum Forward.

By **Dan Shea**

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he philosophy of Dr. James Pogue is framed through the perspective that we are more similar than we are different, but that those differences are what help to make conversations richer, more productive and make our relationships more significant. FORUM spoke with Dr. Pogue about the interconnectivity of different generations, the importance of embracing diversity and the challenges and benefits of undertaking necessary cultural changes.

FORUM: How are the recent generational shifts different than the those of the past?

I think this one is different, in part, because of the empowerment of the upcoming generations. By that I mean the parents of the Millennials did a great deal to ensure that they had a voice. When I was growing up, it was said, “A child should be seen and not heard.” Now, parents want you to be heard and they want you to be heard often. They wanted to know what was going on with the young people. These young people are in the workforce now and, lo and behold, they still want to be heard. They spent the first 15 years of their lives with their parents saying, “Hey, talk to me, talk to me.” They received pretty consistent feedback, but now they go into the workplace and they’ve got bosses who don’t expect to hear from them at all. They expect them to follow their rules that have been in place for generations, but they’ve never been raised to follow those rules. So, part of it is that empowerment.

The second thing is access to information. They are able to see the real-time data that either comports with, or doesn’t, the stories they are being told by their bosses. It’s a difficult challenge trying to talk about an example of leadership or openness, honesty and transparency, when day after day they see the lack of that happening in the corporate space, the association space, the educational space and political space. It breeds a brand of distrust that supersedes anything that we can tell them, because they are seeing a CEO that literally stole millions and millions of dollars from his

company and he got a golden parachute, while a bunch of other people no longer have pensions.

FORUM: Millennials have a reputation for jumping from job to job. Do you think this behavior will settle or is it how the workforce operates now?

Many young people go into a job knowing it’s not what they want to do. It’s what they have to do. They have student loans, they’re still living with mom, they want to get a car—they have to have some version of income. They started dreaming about who they wanted to be and that has not matched up with their educational choices. I don’t think there’s anything wrong with that. I think there are millions of people across the planet that went to college or trade school or the military and became educated, then realized that what they were educated in was not who they are or not who they want to be.

Circling back to the education of Millennials, we have told them, “You don’t have to stay. You can do something different. If you don’t want to join the soccer team, then you can go and be an artist. If you don’t want to be an artist, you can be an architect. If you don’t want to be an architect, you can go save the planet by figuring out how to increase water levels in South Sudan. You can do all of this.” So, when we have empowered a group of people who invest in themselves in a significant and passionate way, it is silly for me as the CEO or the HR person, to expect them to be different than who we trained them to be. I think it is likely to continue.

“There are a lot of really good people out there who weren’t trained for generational politics and diversity and inclusion, but are figuring it out. They were finance people or they were lawyers or they were something else, but now they have to realize how critical or how important this is.”

Generation Z is a bit more pragmatic. They are still big-time dreamers, thinkers and opportunists, but they have seen what has happened with the Millennials and how the Millennials have basically been slapped around. They see how the term Millennial is almost a curse word in 2017. They don’t want that for themselves. I think there is going to be a “settling” in terms of behavior, but I think we need to be cautious. We may call it flitting from job to job, but the person who’s doing it is basically saying, “I’m trying to figure out how I connect with the world.” An organizational leader can capture that entrepreneurial spirit and passion and create opportunities by saying, “Hey, I know you may only be here for two or three years, but I’m going to work to expose you to a lot of things, so that you can make the best choice, even if it’s not with my organization.”

FORUM: If someone is experiencing microaggressions in the workplace, what is the best way for them to handle it?

To start with, I believe most people, by and large, are good people. If they are saying or doing something that is hurtful and knew how hurtful it was, they’d be much less likely to do it. If I’m experiencing microaggressions in the workplace, if there’s HR, an organizational ombudsman or a mentor, that’s where I would start. I would express to that person, “This is what happened. This is how frequently it happens. I’m not even sure this person is aware of what they’re doing, but it’s causing me problems or pain or discomfort.” Then ask for some advice. If it’s a friend or a peer in the organization, they might not have as much power either,

but they might be willing to go with you to the HR office or a supervisor so that you can have that conversation with somebody.

You have to end your silence. Any time that you’re being mistreated in any kind of way. You have to choose to have a conversation with someone, hopefully in a decision-making capacity, but at least a colleague or a peer might be able to walk with you to the place where that could happen.

FORUM: What if you are the person who is being accused of committing the microaggressions?

The first tool is awareness. Most people don’t think of it as a tool. It’s kind of esoteric, but when I can become aware that there are individuals, ethnicities, religions, cultures and generations in the workspace and that they are of value, then I am framing my mind to receive whatever can happen next. Awareness is the hardest tool and it takes the longest, especially for those of us who have been behaving a certain way for decade after decade and are not ready to accept change quite as readily. That can be really tough, but I think it is the most impactful way to do it, because of the long-lasting change.

If I am the perpetrator, it’s about approaching those people who I have harmed and starting with a heartfelt apology and then listening to them and hearing what they have to say. I can tell you that I, not purposefully, have actively done some things that made the people on my staff uncomfortable. When it was brought to my attention, I literally had to sit down and realize how poorly I’d been treating people unbeknownst to me. I had to go and apologize. I had to sit

down with these people who were my colleagues and my friends and say “I didn’t realize what I was doing.”

I gave them permission to help me improve by letting me know what I need to approach that kind of microaggression again. That was hard for both of us. I’m looking at them seeing the pain that I’ve caused them and trying to apologize. Unfortunately, apologies aren’t something that come as readily as they used to perhaps in our world, whether it’s corporate or education or political. I think that’s where you start.

FORUM: Is it easier for people to seek guidance if they feel they are represented in upper management?

It is easier and there’s a great deal of data to back that up. If you look like me, whatever that look may be, in terms of religion or ethnicity or sexuality, etc., then I’m more likely to feel connected to you and go to you for assistance. However, I think that if I circle back to what I said at the beginning about awareness, be aware that the help that you need can come from any vessel. There are all kinds of really good people out there who don’t look like me, who are not of the same background as me, but who are passionately intent on helping people. That’s what I would say first, just in terms of getting help or getting assistance or getting mentorship. The person would not have to have my background.

FORUM: Diversity has improved overall in associations, but that improvement has happened mostly at lower levels. How can organizations improve diversity all the way up the to the C-Suite?

In terms of diversity going up the food chain, there’s an old saying, “Power doesn’t give up anything without a struggle.” Whenever there is a significant cultural change in an organi-

zation—bringing in a woman, bringing in a minority, any group—there can be a productivity dip while the organization is resettling. It may last two months or two years, but it’s during those times that the leadership of an organization can be replaced for a lack of productivity. CEOs and presidents know this. They know that if they raise the alarm about diversity, that’s fine. It’s one thing to do it, it’s another thing for an organization to be culturally prepared for that. If they are not and they have to go through this productivity dip, that could lead the CEO to lose his or her job. When a president or CEO or the board of an organization decides that diversity is important, they will demand that it happens. When they know that it is so important that they are willing to navigate through the productivity dip, then we will be able to make significant cultural change.

On the bright side, I believe that there are organizations that see this happening and, either for economic reasons or because it’s the right thing to do, they make significant adjustments. You’re going to see it from the top down. They are going to be willing to navigate the productivity dip on the front end, because they have planned for it. They don’t want to lose money or market share and they don’t want to disappoint their shareholders, so they will plan for it significantly. They will make the announcement, they will push forward and they will lead industries in reorganizing diversity and inclusion and generational balance and equity. They are going to do that. I firmly believe that is going to happen. There are a lot of really good people out there who weren’t trained for generational politics and diversity and inclusion, but are figuring it out. They were finance people or they were lawyers or they were something else, but now they have to realize how critical or how important this is.

Conversely, I think there are organizations that aren’t that way. I think there are a minority of organizations that believe “they” need to be more like “us.” As soon as they can figure out how to be like us, then we can get along. If they, whoever they are, can never truly be like us, then they need to recognize that they are less than. That is where there are maximum amounts of conflict. That’s where the lack of understand-

ing and tolerance finds its home. There are some powerful people who simply are not willing to give up power without a fight.

But here's the thing—there are a lot of people who are willing to fight. There's a lot of people who are willing to struggle. They are not going to give up. There's an old saying that says "Resistors will outlast occupiers all the time." In this case, the resistors are the people who believe they are fighting for a brand of equity that does not quite exist. Occupiers are those who want to maintain the status quo. I believe that resistance is significant, it is smart, it is articulate. It also can be messy, poorly led and dangerous. Those of us who have the capacity to see around the corners need to help those people to make the best choices for them and their organizations so that their ideas can be best heard by people who can most make a difference.

We also need to spend some time educating our business leader friends or our associates who don't agree with those ideals. Even if it takes a different argument. If it takes a litigious argument, "Hey, you don't want to be sued by a group of people whom you have your cultural policy because it made you feel uncomfortable, because you will no longer exist." Maybe it's economics—organizations that are more diverse, that have gender equity are more successful. They make more money. Whatever argument it takes for me to help someone to understand that gender equity, diversity and inclusion are good

things, that's the one that I will make.

As I mentioned before, it's awareness that will help you use whatever tools you have more effectively. A hammer may look like a hammer, but I can use it for a variety of things. I can use it to close a door, I can use it to tear a door down. It's how I choose to use it. It may also mean that every now and again, leaders and creative types have to come up with a new tool. Until that happens, we have to make the best use of the old ones. I'm optimistic that most people are really good people with great intentions—they simply don't know. It's my job as a consultant, as an educator, as a human and as a person on this planet to help lead this change. For those who aren't quite good people, well, you know what, I'm going to help you, too. I'm going to love you and I'm going to, in an impassioned way, embrace the kind of change that I think is going to help us all move forward. 📧

Dr. James Pogue is the CEO of James Pogue Enterprises. He can be reached at info@jamespogue.com.





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The Association Melting Pot

Meeting the Needs of a Diverse Membership

By **Dan Nielson**

Mitchell Dvorak, MS, CAE, is the Executive Director of the International Association of Oral and Maxillofacial Surgeons (IAOMS). Dvorak previously co-founded and served as the Executive Director of Consumers Advancing Patient Safety. He has extensive experience working with non-profit organizations in the healthcare and patient safety fields, including, the National Patient Safety Foundation, American Medical Association and the North Dakota Medical Association. Dvorak was selected as a scholar for the ASAE Diversity Executive Leadership Program (DELP) class of 2010-2012 and was elected to the board of Association Forum in 2015.

Mitch Dvorak,
Executive Director,
International Association
of Oral and Maxillofacial
Surgeons



A Diverse Reality

When I was in graduate school studying learning styles and leadership methods, there was a theme that permeated much of the discussion: Every individual is unique and therefore has different needs. This principle holds true in all aspects and stages of life. First-grade teachers understand that each little girl and boy learns differently and requires his or her own approach. Athletic coaches know how to tailor their instruction and feedback for various types of personalities. Business executives, if they are to be successful, must understand the support needs of each employee. People are, by nature, unique. Within any group of individuals, large or small, diversity exists.

For those of us who live and work in the association world, we likely agree that there is nowhere this holds truer. Associations are, in most cases, organizations made up of individuals within a field or industry—each with unique opinions, aspirations, challenges and needs. And just like the teacher, the coach and the CEO, leaders in the association space must understand not only who their members are, but what their unique needs are and how they can meet them.

After all, successfully meeting the needs of your members will not only lead to satisfied, dues-paying individuals, but will also help you build a value proposition for future growth.

This year, Association Development Solutions has had the pleasure of partnering with the International Association of Oral and Maxillofacial Surgeons (IAOMS) and its Executive Director, Mitch Dvorak, on the Foundation's fundraising efforts. Mitch has generously agreed to provide his perspective throughout this piece, bringing a valuable perspective on serving a diverse association membership.

How would you describe the dynamics of serving a diverse association membership, and in your case, an international one?

MD: "There are just so many factors that create diversity in an association, and it's a consistent challenge to make sure we understand and account for all of them. Within our membership,

we have spectrums of socio-economic situations, cultural differences, age gaps, career stages... and that's just a few. We have to consistently ask ourselves if we really understand our members and their unique situations and needs, and if we are doing what's necessary to meet them."

Reflection: Do I truly know and understand the diversity of our members? Do we understand their unique needs and goals? Have we done the legwork to find out?

It All Starts With Leadership

Imagine a fictional association for a moment. One with huge resources, a large membership and a great reputation. Now, think about the board and volunteer leadership of this successful organization. What do you envision? Hopefully, we all picture a group of leaders that is just as diverse as the membership it represents. This doesn't only mean gender, age or ethnic diversity—although that is certainly a big part of the equation and should be a goal. It also means diversity among types of members or sectors within the field or industry.

In a medical organization, your members may consist of private practitioners, academicians and institutional professionals. Immediately, we have three groups represented, and each has different thoughts and needs. How could they not? They each apply their knowledge and expertise in very different settings every day.

In many organizations, geographic location is another critical factor when considering the representative nature of your leadership. Even within the United States, there are always cultural and economic differences that need to be addressed. East coast vs. west coast, urban vs. rural and political leanings are just a few. Certainly, internationally this is magnified ten-fold.

Your boards and committees are the bodies that are making strategic decisions that will affect the direction of your organization for years to come. Given that reality, should it not be a top priority to make sure your leaders understand—and are representative of—the members they are leading?



How has your leadership worked to ensure they are representing the unique needs of your members around the world?

MD: “First, we have a board of leaders from various geographic locations and types of practice. We have board members from numerous countries that represent our membership, and also private practitioners, academicians and those in hospital settings. Outside of the board, we have also worked very hard on our committee structure to create open lines of communication from all factions.

Also, our board has made a conscious decision to pursue ideas that will be inclusive of our unique members, regardless of their location, challenges or status.”

Reflection: Do we have volunteers (board members, committee members, others) who are representative of our diverse membership? What steps can we take to improve in this area?

Key Diversity Points

Allow me to break for a moment into my personal area of interest. In the association fundraising world, we encounter the dynamics of diverse memberships in every client situation, regardless of size, scope or field. Even within the realm of fundraising there are almost too many factors to count that all play into this. I could list examples down the page of things that we’ve likely all heard if engaged in fundraising.

“It’s not really a part of the culture in this location to just ask for money.”

“Shouldn’t we weigh financial donations differently, depending on the individual and their capacity?”

“Group ‘A’ will be excited to give toward one initiative, and Group ‘B’ will probably more excited to give to another.”

“Donor recognition isn’t really a part of the culture here—but those other folks might like it!”

Just as in fundraising, leaders and staffs deal with these same dynamics every day while working in education, research, membership growth,

marketing, advocacy and on down the line. So, what are some of the key points of diversity to be aware of? The following is not intended to be a comprehensive list; however, it’s a starting point that can help us ask ourselves: “Are we accounting for all of these in our marketing, education, membership and fundraising?”

- Culture: Differences in what is appropriate or effective based on setting
- Socio-economics: Differences in financial capacities and associated entry points
- Technology: Differences in individuals’ access to platforms and systems
- Career: Differences in professional status and experience

These differences, together, define and determine the needs of an association’s various members.

What are you doing at IAOMS to make sure that you are taking each member’s needs into account, given all of these diversity factors?

MD: “Several things in particular. First, we had to know what the differing needs were before we could plan to address them. In the last few months, we’ve conducted several assessments among our members to get feedback. This included educational interests, professional development needs and membership value. Now that we know, we can act.

Second, we’ve worked to create opportunities for specific factions of our members to interact in a comfortable setting. An example of this is the “Next-Gen” group we have established, which provides in-person and online venues for our young and developing members to learn, engage and network.

Lastly, we have revamped our educational approach to include more in-person and virtual programs that resonate with various cultures around the world. This, combined with our Foundation’s work in global education, creates a widespread approach that meets numerous needs.”

Reflection: Are there factions or segments of our membership whose needs we do not meet as well as others’? What could we do to address this?

“Engage your members consistently. They want and need to hear what is going on and what is available to them, and it gives them an opportunity to take advantage of the solutions to their needs that you are offering them.”

Action!

Understanding the diverse needs of your association membership is just half the battle. Acting on them to create an environment of value for every one of your members is the next step. Here are four simple steps to consider to accomplish this:

1. Embrace **DISCUSSION**
 - a. Create an open dialogue among leaders and staff. Ask the hard questions: Are we meeting our members' needs? Are we missing anyone? What can we do differently?
2. Embrace **INFORMATION**
 - a. Consider some due-diligence. It doesn't have to be complicated; it can be as simple as asking your members how they feel the association could provide them with more value. We can gain invaluable insight just by asking simple questions.
3. Embrace **CHANGE**
 - a. Don't be afraid to try new things. The worst thing that can happen is they don't work. And you're typically no worse for wear!

4. Embrace **ACTION**

- a. Create a plan of action based on your discussion and information gathering, and stick to it!

What advice would you give to fellow association leaders as they aim to meet the needs of a diverse association membership?

MD: “First, due-diligence is extremely important. Without getting feedback from the members themselves, we're just guessing. Second, engage your members consistently. They want and need to hear what is going on and what is available to them, and it gives them an opportunity to take advantage of the solutions to their needs that you are offering them. Lastly, take advantage of the community of association professionals that Association Forum and other organizations provide. There is a wealth of experience here, and we would all be wise to tap into it.” 

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Next Steps in Creating a Welcoming Environment

By **Jim Zaniello**

Jim Zaniello

*President and Founder,
Vetted Solutions*



Chair of the Association Forum
Welcoming Environment Committee

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The association community is at a pivotal point in our long history. We cannot deny that many of our long-standing governance, cultures and practices do not embrace nor reflect the diversity of our communities. Yet humans have a natural tendency to gather and associate around common ideals and will leave their professional society to find another one if it does not embrace them and their uniqueness. The importance of inclusion and a Welcoming Environment to an association's growth and sustainability are critical.

Association leaders are in the habit of looking to each other, and to groups like Association Forum, to understand how to evolve and for insights into the direction of our industry. Association Forum's mission is to advance the professional practice of association management. As associations are facing aging memberships, rapid change and significant economic and political disruptions, Association Forum guides members' conversations about culture, mission and future value. The success of an association hinges on its ability to build a stakeholder and member culture that is engaging and creates a sense of belonging. Through the Welcoming Environment program, the association community now has the framework to position themselves for future success.

A Welcoming Environment (WE) is the creation of a sense of belonging and connectedness that engages individuals in an authentic manner in which uniqueness is valued, trusted, respected and supported through opportunities and interaction. A Welcoming Environment takes diversity initiatives to the next level by not only including and recognizing diverse individuals but consciously knowing that our community is better because of its uniqueness in all aspects of the association ecosystem. Diversity fosters innovation and business growth, which is core to our mission.

"Being a Welcoming Environment is one of Association Forum's Core Values, not only because inclusion is the right thing to do, but because the association community is strengthened when all voices can be heard." says Association Forum CEO Michelle Mason. "People from all walks of life and every corner of the world find their way to the association industry and when they get here, we want them to know they are a welcome part of community."

Diversity initiatives often fail before they begin because their stated goal is to simply increase the level of diversity at an organization. However, research shows that inclusiveness—a core element of Welcoming Environment—is necessary for success. According to Vetted Solutions' *Diversity and Inclusion: Core Values Among Association Study*, 45 percent of associations reported having a diversity strategy for hiring, but only 22 percent had a diversity strategy for onboarding.

Conversation Circles

In April, Association Forum convened a series of conversation circles with homogenous groups of members: Black/African-American, White, Latino/Latina and LGBTQ. Trained focus group facilitators led participants through the same questions and asked each group to complete a quantitative survey. While each conversation was unique, some key themes emerged from the conversations.

Key Themes: Current State

- Associations are not effectively building a Welcoming Environment. Many associations do not have stated goals around diversity and inclusion and many that do are not effective. Some associations think they have made progress by merely stating a goal of diversity and not actually implementing it.
- Many do not understand the business case for a diverse staff and member community.
- Diversity in associations tends to exist from middle management and down. There is little diversity within association leadership.
- Gender diversity is progressing faster than racial diversity.
- People of diverse backgrounds cannot represent



“Diversity unlocks innovation and drives market growth—a finding that should intensify efforts to ensure that executive ranks both embody and embrace the power of differences. Valuing differences is a 21st century expectation.”

- Harvard Business Review; *How Diversity Can Drive Innovation*

the voice of their entire population. People are diverse on multiple levels and their diversity should be embraced.

- Inclusion is the goal. The term “diversity” implies that some are outside the norm. There is no norm and we are all diverse.
- Association Forum needs to help associations adopt new terminologies for gender identification. Millennials use a different language around gender identity, and it is imperative that this language is understood.

Key Themes: Staff Recruitment, Onboarding and Training

- Associations must identify the best candidates for the job and hire based on skills. Associations can explore how to build a more diverse pipeline of candidates. They can advertise job opportunities in places that attract diverse candidates. All groups agreed that associations should seek the best and brightest first and cast a wider net to attract diverse talent.
- Associations need to create equal opportunities among their staff to acquire the skills to advance into leadership positions.
- Onboarding is critical to the experience of being welcomed within a company.
- Diversity training is lagging, irrelevant and dated. It comes off as “checking the box,” only at the awareness level, not actual learning.

Key Themes: Behavior in the Workplace

- There is a perception that white professionals are more likely to ask for a promotion or an incentive when taking on new projects. Minorities are less likely to say “no” or ask for a promotion in similar circumstances.
- There is a perception that the value of networking is inherently understood by white association professionals but not by other minority professionals. Networking is critical to advancing in the association industry.

Key Themes: Association Board

- Association boards are typically white. Based on the industry, there may be gender diversity.

Many boards are still experiencing “firsts.” Such as the first Black, Latina or LGBTQ member of their board.

- Typically, nomination committees select board members that they know, so the nomination process should strive to minimize an unconscious bias on behalf of the nominating committee.

Our Approach

The goal of the Welcoming Environment (WE) program is to equip associations and non-profit organizations with the tools and information they need to build a WE within their constituent communities and their internal staff environment.

The Welcoming Environment program is organized around an E-3 framework: Engagement, Education and Experience.

The Engagement piece involves encouraging members and the larger association community to participate in courageous conversations to push boundaries, learn from fellow members and drive innovation. This is to be accomplished through the conversation circles, as described above, as well a partnership program to support WE initiatives with sponsors and other identity-based groups interested in collaboration. Online communities, including MyForum, are a great way for members to drive conversations and for organizations to engage members.

Education is the second part of the E-3 framework. We want to educate organizations on the importance of building a Welcoming Environment within association member communities and communicate to them proven strategies for success. Association Forum is proud of our ability to create powerful and memorable education programs and events. We look accomplish the education part of our initiative through an awareness campaign about the program, providing a WE Resource Kit and peer-to-peer education at our signature events, including the new Welcoming Environment Summit at Holiday Showcase. There will also be year-round education to bolster the knowledge-base of our members.

The third element is Experience. We have adopted WE as a core value and we strive to ensure that every member has the experience of feeling accepted and welcome in our organization. The

WE concept was at the forefront during the recent redesign of Association Forum's offices. The idea was that members would experience an open and engaging environment to truly feel that we are their Forum—a gathering place for innovation.

Resource Kit

One existing tool that has been utilized by members is The Welcoming Environment Resource Kit. Available on our website, it will be a constantly evolving resource and collaboration platform as our members' needs progress. We will stay in dialogue with members for their insights into the structure of the kit, so that it reflects members needs and resources .

Up Next!

The Welcoming Environment Summit will be offered in December 2017. A summit within a summit, it will include ground-breaking discussions organized and led by members. Dr. James Pogue, closing keynote speaker from Forum Forward 2017, will be back to engage us and to encourage us to accomplish even more than we already have.

In April 2018, Association Forum will leverage "Celebrate Diversity Month" to give elevated exposure to this program. Celebrate Diversity Month will give Forum the opportunity to celebrate diversity and the resources that Forum offers for members. Between our Summit in December and this celebration, we will offer educational programs that address such topics as overcoming unconscious bias, interviews with members showcasing their success stories, a showcase of inclusion programs offered by members and a young professionals program.

Over the course of the rest of the year, and into 2018, we look forward to connecting with you to learn how you have been successful in creating a Welcoming Environment. So many of our members have stories to share that we can all learn from. And that's the heart of our community ... sharing! 📷

Jim Zaniello is the President and Founder of Vetted Solutions and the Chair of Association Forum's Welcoming Environment Committee. He can be reached at jim.zaniello@associationforum.org.

Leading the Way

An early supporter of the Forum's work in this area, Travel Portland leads the way in its own community as well as in ours. Whether it is sponsoring the Breakfast for Champions Interactive Workshop on Taking the Next Step in D&I Work with Partners in Diversity or utilizing its web page to showcase Multicultural Portland, this organization also talks openly with meeting planners about how to ensure a welcoming environment in Portland OR for their event.

"The Welcoming Environment program aligns with who we are and what we do. We see ourselves as a convener on this topic," said Tamara Kennedy-Hill, Vice President, Diversity & Community Relations for Travel Portland.

"In November, we will be bringing large corporations together to help them connect with the 100 business owners of color. We're also embracing the entrepreneurs of Portland including helping entrepreneurs of color be visible, welcomed and for them to experience our community as well as to share thoughts on how to promote opportunities for the businesses. In February 2018, we are hosting Connect Direct. While it builds on our November event, it will focus on the meetings community – educating them about the diversity and inclusiveness of our community. Both the November and February events will feed into the March activation event where we hope to showcase these local efforts to the association CEOs coming into our community," Kennedy-Hill continued.

Looking into the future, Kennedy-Hill said, "We want to help those bringing their meetings here to be able to find diverse businesses in our community. In the future, we will work with our Customer Advisory Board to help us look at how we build this important work into the RFP process. We're also going to ask them to help us address how a destination prepares to be responsive if there's an event that threatens the comfort and safety of our community."

With the Association Forum, Travel Portland has supported our Conversation Circles, the upcoming Welcoming Environment Summit in December and the 2018 Women's Executive Forum. In addition, it will host an association CEO program in March 2018 to showcase its efforts.

travel
PORTLAND

ASSOCIATION FORUM'S
PARTNERS
— *Make it* —
POSSIBLE

New Month!

New Location!

March 7, 2018

Save the Date!



Women's Executive Forum

In celebration of Women's History Month in March, we are hosting the seventh Annual Women's Executive Forum at the new Marriott Marquis Chicago.



"There will be programming for CEOs, Aspiring CEOs, and Rising Stars! Last year was sold out, so be sure to put this on your calendar."

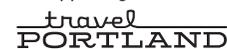


Kimberly Mosley, CAE, CPE
President, American Specialty Toy Retailing Association
Chair, Women's Executive Forum 2018

Experience Partner:



Supporting Partner:



Learn more at associationforum.org/events/womens-executive

T E X A S
WELCOMES
ALL

On behalf of Texas Welcomes All and members of the Texas travel and tourism industry, **THANK YOU** for your ongoing support during the 85th Texas Legislative Session and Special Session.



Texas Welcomes All is a catalyst in uniting our community and reminding the world that we support, celebrate and welcome all who visit, live, learn, work and play here. Texas embraces and promotes diversity, inclusion and equality and understands it's our differences that make us stronger. Deep in the heart of Texas, from our contemporary cities to our small towns, and from every corner of our state - we welcome all.



Texas Welcomes All is a coalition of tourism industry leaders who aim to showcase the inclusive nature of Texas and its residents by sharing the message that Texas is open for business to everyone.
www.TexasWelcomesAll.com