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FORUM



HOW NEW POWER LEADERSHIP Can Shape You and Your Organization

2023 | SUMMER ISSUE | V107

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LEADERSHIP, MENTORSHIP, AND MORE!

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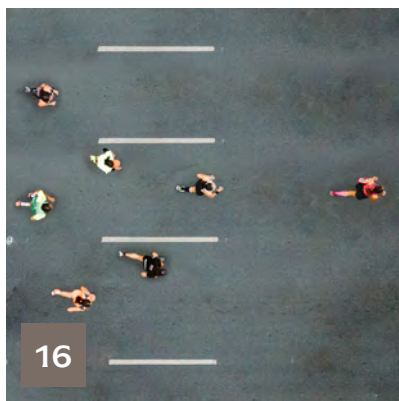
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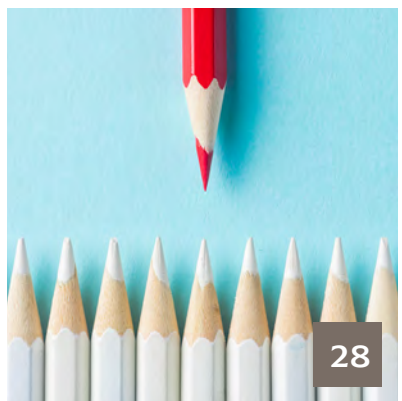
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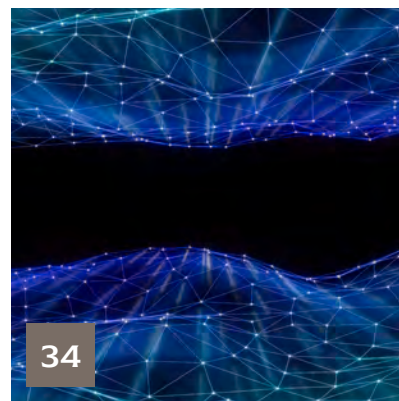
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LETTER FROM THE CEO



How Associations Have Embraced “New Power Leadership” All Along

I am excited to share with you our progress toward a brighter, bolder future.

We recognize that as our members' needs change, we must also change to meet those needs. That's why we are currently undergoing renovation and transformation to benefit our valued members.

While change can be difficult, we are investing in new technologies, expanding our membership, and developing new education and learning opportunities to help you stay ahead of the curve and achieve your professional goals. We are taking every step to ensure the transition is as smooth as possible and will provide you with regular updates and support throughout the process.

The “new power leadership” concept is gaining traction across many sectors, including associations. TJ Baskerville, Assistant Director: Online Education at the Radiological Society of North America (RSNA), wrote an outstanding cover story (page 8) about the concept of new power leadership and how it can be applied to the important work we do in association management. Coined by authors and philanthropists Henry Timms and Jeremy Heimans, new power leadership refers to a leadership style that harnesses participatory and decentralized networks to mobilize people toward a shared goal.

For associations, new power leadership means building upon existing networks and empowering members to become more active and engaged.


Associations have always relied on the power of community and collaboration to achieve their missions. By empowering members, fostering connections, and adapting to changing needs, associations have created strong networks of support and advocacy. The goal has always been to provide value to members and promote positive change in the industry or field they represent.

For associations, new power leadership means building upon these existing networks and empowering members to become more active and engaged. This can include giving members a say in decision-making, providing opportunities for peer-to-peer learning and collaboration, and embracing transparency in all operations.

At Association Forum, we are committed to this approach, and our new **Excelerate** program is designed to embody the principles of new power leadership. This program is focused on three main themes: **New Power Leadership, Tomorrow is Now**, and **Intrapreneurship**. Each theme is designed to encourage members to take an active role in shaping the future of associations and their industry.

We are excited about the possibilities that new power leadership offers and believe that by leveraging the power of our community and embracing transparency and collaboration, we can continue to provide value to our members and drive positive change in the industry.

As we continue to evolve and adapt to changing needs, we are committed to keeping our members informed and engaged.

While the concept of new power leadership may be new to some, associations have been embracing this approach all along. By building strong networks of support and empowering members to take an active role in shaping the future, associations can drive positive change and stay relevant in an ever-changing world. At Association Forum, we are committed to this approach, and we look forward to continuing to serve our members and drive positive change in the industry. 



Association Forum is here to support you as a new power leader. In addition to volunteering or joining a Shared Interest Group, below are some programs that can help you develop the skills and mindset to advance in your career.

FUNCTIONAL EXPERT

- Association 101 & Association 201
- Forty Under 40
- FORUM Magazine
- Holiday Showcase®
- Honors Gala
- Webinars
- Women's Executive Forum™

EMPOWERED MIDDLE

- CAE Study Group
- Director's Kitchen Cabinet
- Emerging Leaders Program
- Forty Under 40
- FORUM Magazine
- Holiday Showcase
- Honors Gala
- Webinars
- Women's Executive Forum

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- Executive Leaders
- FORUM Magazine
- Holiday Showcase
- Honors Gala
- Kitchen Cabinets
- Webinars
- Women's Executive Forum



ARTESHA MOORE, FASAE, CAE

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As part of our efforts to provide a Welcoming Environment® for our members, we are providing a copy of Association Forum's Core Values translated into **Polish** by Interpro Translation Solutions, Inc.

Be a Welcoming Environment

We are a welcoming environment that actively seeks to enhance the larger community by recognizing the whole is greater than the sum of its parts. We will make everyone who interacts with us feel welcomed, represented, engaged, inspired and empowered.

Embrace Innovation and Quality

We love to try new ideas and seek inspiration from inside and outside the association community — we value improvements big and small. Experimenting with breakthroughs is encouraged and celebrated; however, we know when to pull the plug. We aim to continuously improve.

Have Fun and Stay Positive

It's a fact that you generally spend more time with your co-workers than you do with your own family. We strive to make our work environment one that is fun, positive and an overall great place to work.

Open and Honest Communication and Teamwork

You don't know what you don't know! Effective communication is key. We shall cultivate an environment where we speak openly, honestly and with the goal of building a better team. Candor is constructively embraced. We will work collaboratively to deliver value to members.

Accountability—Own It

We hold each other accountable and expect people to respectfully ask questions and raise concerns. Because work requires interdependent teams and collaboration, we will trust and depend on each other to be responsive and to deliver value and quality services to stakeholders.

Win with Integrity

We operate ethically, contributing our time, talents and know-how to advance our communities where we work and live. We commit to growing our association in ways that benefit the environment and society.

W ramach starań o stworzenie przyjaznej atmosfery (Welcoming Environment®) dla naszych członków, poniżej przedstawiamy listę podstawowych wartości, przetłumaczoną na język polski przez Interpro Translation Solutions, Inc.

Tworzymy przyjazną atmosferę

Tworzymy przyjazne środowisko, które aktywnie zabiega o wzbogacanie ogółu społeczeństwa wyznając zasadę, że zespół jako całość może więcej niż suma jego składowych. Pragniemy, aby każda osoba w naszym środowisku czuła się mile widziana, reprezentowana, zaangażowana, zainspirowana i miała wiarę we własne siły.

Stawiamy na innowację i jakość

Uwielbiamy nowe pomysły i stale poszukujemy inspiracji, zarówno wewnątrz naszego zrzeszenia jak i poza nim, doceniając nawet najmniejsze usprawnienia. Zachęcamy do stosowania przełomowych rozwiązań, ale wiemy też, kiedy nie należy dać się ponieść. Naszym celem jest stałe doskonalenie.

Radośnie i pozytywnie

Faktem jest, że obecnie spędzamy więcej czasu z kolegami w pracy niż z własną rodziną. Staramy się więc, aby atmosfera była radosna, pozytywna i ogólnie tworzyła wspiane miejsce pracy.

Uczciwa i otwarta komunikacja zespołowa

Nie każdy wie wszystko! Kluczem jest efektywna komunikacja. Staramy się kultywować środowisko, w którym można mówić uczciwie i otwarcie, mając na celu budowanie lepszego zespołu. Szczerość postrzegamy konstruktywnie. Członkowie naszego zrzeszenia czerpią wartość z wzajemnej współpracy.

Wykazywanie odpowiedzialności

Każdy z nas odpowiada za własne postępowanie, dlatego zachęcamy osoby do zadawania pytań i rozwiewania wątpliwości. Nasza działalność wymaga współpracy niezależnych zespołów, więc musimy mieć do siebie zaufanie co do jakości usług przekazywanych naszym odbiorcom.

Etyka zawodowa wygrywa

Działamy w sposób etyczny, rzetelnie przekazując innym swój czas, umiejętność i wiedzę, tak w pracy zawodowej, jak i życiu prywatnym. Zobowiązujemy się wzrastać w naszym zrzeszeniu w sposób korzystny dla środowiska i społeczeństwa.



NEW POWER LEADERSHIP

and Your Organization

By TJ Baskerville

Have you heard of the term “New Power Leadership”?

It's a leadership model that's becoming more popular in the business world, but many people are still not fully aware of what it entails. The reality is that many of us have already transitioned to this new leadership model and don't even know it. However, I feel that intentionally implementing this model can have significant benefits.



“New power leaders do not get their power from being ‘over’ people, but rather get their power from being connected with people.”

The simple mention of COVID-19 triggers so many different emotions. It has brought about many changes in our lives, including the way we work. Organizations that never had work-from-home options quickly discovered that employees can still be productive when working remotely. During a Zoom meeting, it's not uncommon to see a pet enter the frame or hear a child playing in the background, which was once considered unprofessional. Remember the guy who was giving an interview on BBC in 2017 when his kids barged into his office and his wife ran in to drag them out? When that video went viral, Robert Kelly, a political science professor at Pusan National University in South Korea, became known as “BBC Dad”. He recently shared some family photos to Twitter to mark the six-year anniversary of the parenting fail. Think of how you felt watching that video in 2017 (pre-COVID) compared to now. Life and all its interruptions are just more accepted in the virtual workplace.

One of the biggest takeaways from COVID-19's impact on our industry is that we don't have to do things the way they've always been done to get great results. Cue new power leadership.

So, what exactly is new power leadership?

It's very much a study in new power vs. old power. Management used to be much more hierarchal. Employees were guided by one person or a handful of people. Bosses made the rules and staff followed the rules. Terms like “authentic leadership,” “transparency,” and “empowerment” weren't used in corporate culture. Somewhere down the line, we realized that we are stronger when we work together, and many contributors can help drive the vision and goal of an organization.

The term was new to me too; but once I learned more about it, I realized it's prevalence in our current work climate. I recently attended Asso-

ciation Forum's Women's Executive Forum™, and one of the questions that was asked at the Knowledge Exchange World Café session was “What is new power leadership and what does it mean to you?” I enjoyed a lively conversation with the women at my table, which got me thinking about the term and where it came from.

In 2016, Jeremy Heimans gave a TED Talk titled “What New Power Looks Like,” where he defined new power as “The deployment of mass participation and peer coordination to create change and shift outcomes.” In 2018, Heimans co-authored a book on the topic with Henry Timms, CEO of the Lincoln Center. The book, “New Power,” promises to help readers understand the 21st century and how collaboration and mobilization are reshaping the world.

In my research, I found a LinkedIn article published by Jesse Chen titled “Understanding New Power Leadership.” Chen points out that new power organizations don't have control centralized in one place like they did in the past. Instead, the power comes from those who are connected to the top and participate regularly. He writes “new power leaders do not get their power from being ‘over’ people, but rather get their power from being connected with people.”

In a 2022 FORUM Magazine article, “Agility & Associations,” author Kim Kelly writes, “for most of the 20th Century, hierarchal business structures were status quo and meant to optimize labor, quality control, and project management. Businesses were run like machines, with top-down management and the assumption that employees needed to be told what to do so that the organization didn't descend into chaos. This is what many refer to as The Management Century.” The article goes on to detail the ways software developers disrupted The Management Century by creating Agile Methodology. In the wake of COVID-19, organizational agility became even more important as the world witnessed rapid changes to the status quo. Kelly writes, “agile organizations reimagine both whom they create value for, and how they do so...they are



intensely customer-focused and seek to meet diverse needs across the entire customer life cycle.” The vision required to lead an agile organization comes from new power.

So, how do you know if you’re operating under new power leadership?

In a Harvard Business Review article by Jeremy Heimans and Henry Timms, authors of the aforementioned book “New Power,” describe old power as currency that few hold—and those who hold it guard it and have the power to spend it. It’s closed off, inaccessible, and driven by leaders. The duo describes new power as a current, noting that it’s made by many, open, peer-driven and distributed. They go on to describe it as water or electricity, saying, “it’s most forceful when it surges” and highlighting that the goal of new power is to channel it, not hoard it.

Anna Polyak, RN, JD, CEO at Society of Surgical Oncology, wouldn’t describe herself as a new power leader because it wasn’t a familiar term for her. But she values collaboration, sharing knowledge, and empowering her staff—all important aspects of new power leadership.

“We have this large conference room table to sit around, and about once every other week, depending on what’s going on, we go around where everybody shares what are they working on, and then all of us can really jump in, learn about it, suggest ideas,” says Polyak.

Polyak credits the leaders she worked for before rising to CEO with instilling a collaborative ethos in her. She started her career as a surgical nurse before earning her J.D. and working in healthcare compliance and public health. She landed in associations when she was contacted by the American Association of Nurse Anesthesiology to head their legal and state government affairs division. She called the job at AANA (which lasted 11 years) a homecoming since she had been an operating room nurse.

“I’ve never been in a situation where leadership was hierarchal,” Polyak says. “My experience in leadership was working together, sharing ideas, bringing everyone together.” She says that this stems from her career as a nurse. “If you want to have successful outcomes in the operating room, you have to work together and make sure there’s effective communication,” she says.

So, how can you apply new power leadership to your business model?

Chen says it’s about shared decision-making, transparency, inclusivity, and servant leadership. As a new power leader, you empower your colleagues, serve them, and communicate with them. Claiming to be a new power leader isn’t enough—you must also encourage those you work with to con-

tribute their ideas and thoughts. Empowering colleagues creates a collective solution to a challenge and the results can be incredible. Polyak says she's always appreciated transparent leadership. "I've had leaders along the way who would not only share with me the things that they knew; they would share with me the mistakes that they made," she says. Now, as CEO, Polyak shares her mistakes with her team. "I say 'guess what? Today I learned something the hard way,'" she says. "It's really important to pass it on to your team," Polyak adds, "not just the good experiences and the knowledge you have, but also, 'this is what I did wrong, and this is why I'll never do this again.'"

For Polyak, creating psychological safety with her team is more important than maintaining a pristine image of herself as CEO. She spoke about creativity and how new ideas inherently involve risk. Work environments that don't support risk won't support creativity.

SSO recently held their annual meeting and Polyak says they implemented a lot of new initiatives. "Most of those ideas came up from conversations at the round table," she says. "Of course, there's a big difference between having ideas and implementing them. We learned that the hard way a little bit too. I'm not going to pretend that it wasn't a big lift to execute it, but we did it and it was wonderful." She says that executing these new ideas required all staff to pitch in and created several learning opportunities along the way. Going through this collaborative process together helped them share information and work together to find real-time solutions to challenges that arose. This is when the current surges.

When Polyak was tapped to be CEO, she reached out to a former boss for advice. She told her to listen to her staff and then act on it. "There's never enough time in the day,"

she says. "Sometimes we forget to just sit and listen to our staff." She was intentional in her listening as a new CEO and now it is a part of her leadership arsenal. "It became a habit and it really paid back because A) I learned a lot; and B) the team felt they were listened to and that they owned the projects we were implementing," she says. This is what it looks like to distribute power and create a current that runs through an organization.



Claiming to be a new power leader isn't enough—you must also encourage those you work with to contribute their ideas and thoughts.

How do you know if you're on the path to New Power Leadership?

Your team will let you know through their communication and behavior. Think of the metaphor of a current—you can feel if a stream is running smoothly or if it's choppy. If your team comes to you for input, but not answers, you are on the right path. If your team feels safe to take risks, you are on the right path. If you see your team collaborating with each other, you are on the right path.

Remember, new power leaders must remain open. Polyak mentioned a staff member who always takes a practical view of the work they do at SSO. "We don't do anything until she says it's ok," says Polyak, adding, "because she will [question] an idea and give us 10 unintended consequences and we value that." Instead of labeling this staff member as a naysayer, Polyak's team calls her "the designated adult" and seeks her input on every project. She says that they still might move forward, but having this staff member's opinion—even if she dissents with the group—adds value to every decision.

: Empowering colleagues creates a collective solution to a challenge and the results can be incredible.



If you read the spring issue of this magazine, you know that we believe in leading at every level. Whether you are a functional expert, part of the empowered middle, or in the C-suite, you have influence and you can apply new power leadership to your role.

Polyak had already accumulated her leadership armamentarium over the course of a diverse and successful career. Yet, she calls taking the CEO position a big step for her. "How will I be? How will I be perceived?" she thought. After reading every leadership book she could get her hands on, she came away with the answer: "At the end of the day, you'll just have to be yourself because there isn't time to be anything else." [F](#)

TJ BASKERVILLE

TJ IS ASSISTANT DIRECTOR: ONLINE EDUCATION AT THE RADIOLOGICAL SOCIETY OF NORTH AMERICA (RSNA). SHE HAS MORE THAN A DECADE OF EXPERIENCE IN ASSOCIATION MANAGEMENT. TJ IS THE VICE CHAIR OF ASSOCIATION FORUM'S EDUCATIONAL PROGRAM DEVELOPMENT SIG AND A MEMBER OF THE 2023-24 CONTENT WORKING GROUP.



KIM KELLY, CAE, EDITOR-IN-CHIEF AT ASSOCIATION FORUM, CONTRIBUTED TO THIS STORY.

ON A DIFFERENT LEVEL



With dynamic and walkable meeting districts, expansive green spaces and inspiring entertainment, Atlanta provides an elevated experience. When we host ASAE's Annual Meeting and Exposition in 2023, the city will boast new hospitality development - with even more on the way.

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LIVE EVENTS

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WEBINARS

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Allyship, Mentorship, Sponsorship: What Does it Look Like and How Can I Participate? | July 11

Improving Associations' Ability to Lead with Agility | July 18

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- And much more!



Watch your inbox and holidayshowcase.org for more information coming soon.

Registration opens late summer!



BUILDING LEADERS

ACROSS THE ORGANIZATION

By Celeste Smith, CAE



A focus on building the leadership capabilities of employees at all levels is critical to future organizational growth.

Global pandemics, artificial intelligence, climate change, cultural revolutions, and more have all impacted organizations, creating a need for leadership at every level.

Leadership Skills Required at Every Level

It is imperative that organizations, especially associations and other nonprofits, invest in leadership development for all employees. Organizations hire high performers who will move the mission forward, and in return, employees expect ongoing career development, on-the-job training, and continual skill development. High-performing organizations invest well beyond initial onboarding and see more immediate and long-term results. According to a Harvard Business Review article titled “How to Help Your Team Learn in the Flow of Work,” these organizations embrace “in the flow of work” learning and offer a suite of modalities to support ongoing development. As employees work to build competencies that produce growth for the organization, a focus on building leadership skills will pay back tenfold.

In looking at organizations that focus on ongoing employee development, the National Business Officers Association (NBOA) and the Society of Professional Journalists (SPJ) are two organizations committed to long-term development. The NBOA, headquartered in Washington D.C., is a mission forward organization that advances the business practices and operations of independent schools. The NBOA has been building ongoing intentional staff development processes for staff at every level for several years. James Palmieri, Ed.D., Executive Vice President at NBOA, provided insight into staff development efforts at the organization. With a distributed staff team, NBOA employees meet in-person three times a year for staff development. The engagements include an in-person off-site retreat and in-office meetings.

The Society of Professional Journalists (SPJ), headquartered in Indianapolis, is dedicated to encouraging the free practice of journalism and stimulating high standards of ethical behavior. The SPJ is another organization that ranks staff development as a high priority. SPJ Director of Education, Karen Sneath, FASAE, believes that even in a relatively flat organization, opportunities exist for staff development. Sneath noted that “the key drivers for SPJ are growth and changes in the journalism profession that require different skills, knowledge, and abilities than in past years.”

With changes and disruption occurring in every industry and profession, upskilled employees show more leadership, are more productive, have more trust and a positive outlook on the future that helps achieve mission and purpose-driven results.

Adapt, Engage, and Build a Pipeline

Organizations that focus solely on developing leaders at the highest levels, face an imminent threat to competitive advantage. Organizations that have embraced more collaborative and transformative forms of leadership see increased employee engagement and organizational growth. The commitment places the organization on a winning path as it improves employee performance, increases job satisfaction, and creates a pipeline of future leaders.

The NBOA exemplifies this in its structured nature of employee development. Two employee leadership committees are responsible for staff development, culture, and climate. Team members who serve on

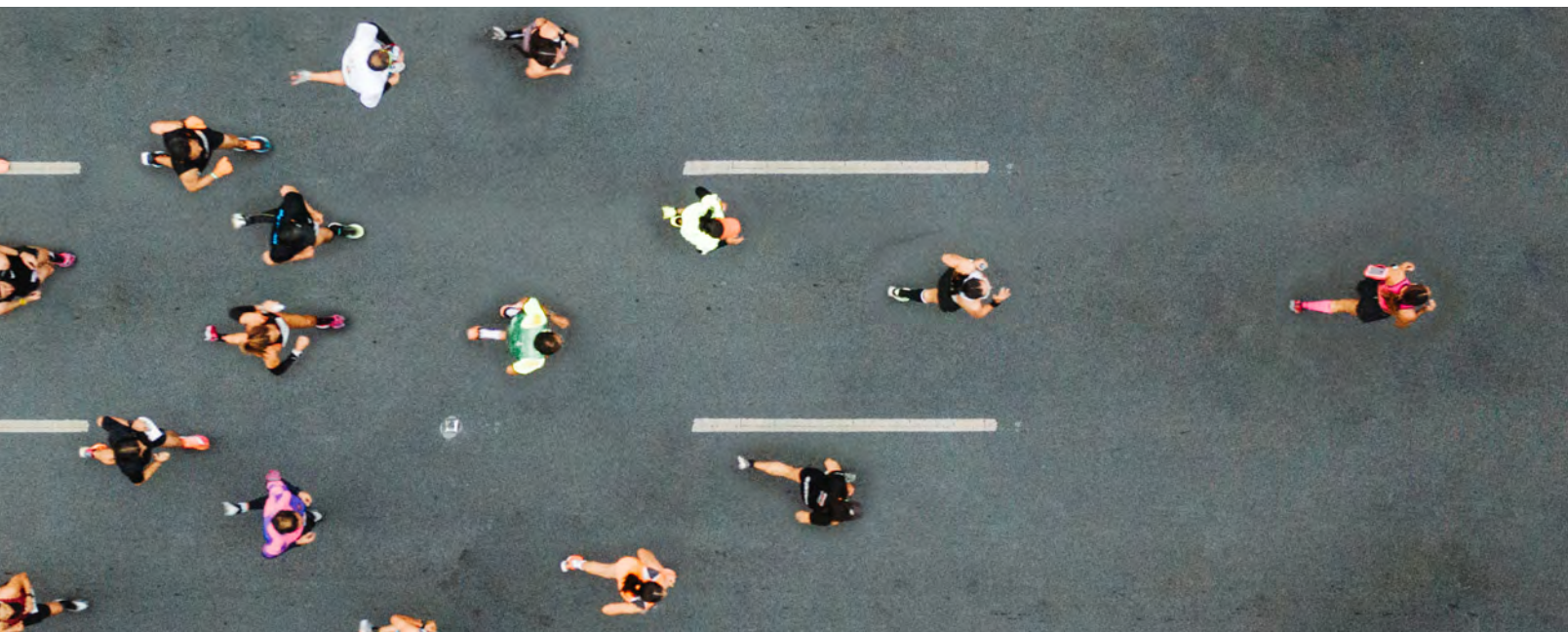
the committees hold two-year terms and include employees from all levels of the organization. The executive vice president leads the Staff Development Committee. The chief learning officer leads the DE&I Committee.

The Staff Development Committee is responsible for year-round development and delivery of employee development programs, professional development programming, climate and recognition initiatives, and partnering with the Staff DE&I Committee. The Staff DE&I Committee is responsible for advancing an inclusive workplace, including developing recommendations for policies, procedures, practices, cultural norms, activities, and evaluating DE&I efforts. Palmieri

cross-training the staff. Budgetary limitations exist, but focus on personal development and staff capabilities is front and center. The SPJ hosts monthly staff development meetings with one of the pillars focused on newer and younger staff members.

Continuous Learning Builds Confident Leaders

Implementing continuous learning that focuses on core skill development builds confident leaders across the board. Skill development doesn't just happen serendipitously. Empowering employees, implementing new processes and practices tied to strategic priorities will assist in building



underscores that “inclusion is critical to the collective success of the organization” and is a core strategic priority for staff, NBOA Board, business partners, members and volunteers supported through collective engagement and collaboration.

The approach taken with SPJ is similar in that all staff have a voice in developing the core strengths of the team. They instituted a more intentional use of professional development plans as a commitment to upskilling and

a continuous pipeline of confident leaders.

Commitment, investment, and support must begin with executive leadership. It then grows and flourishes with buy-in and personal initiative of employees at all levels. It is important that executive leadership embrace a “flow-through” approach that models the way, embodies organizational goals, and pursues the envisioned culture and climate for leadership growth.

High-performing organizations adapt their approach to empower employees to lead, flex their learning muscles, and advocate for change that will bring more innovative, efficient and effective ways to serve clients, members, and partners.

A sampling of core skills, capabilities, and behaviors most needed across every industry include:

- Communication
- Decision-making
- Collaboration
- Culture awareness, humility, and inclusion
- Emotional intelligence
- Coaching and mentoring

It is an ongoing process of learning that builds these skills and capabilities within the organization. The Association of Talent Development (ATD) created a capability model for talent development professionals that serves as an industry-wide tool. As an example of developing inclusion acumen, NBOA held an anti-bias training during a recent staff development retreat and hosted another segment on future trends affecting associations led by Michelle Mason, FASAE, CAE, President and CEO of ASAE.

As organizations continuously look for creative ways to incorporate employee leadership training and development, a hat tip goes to NBOA for developing a learning opportunity entitled “White Space at Work,” based on Juliet Funt’s work and book, “A Minute to Think.” The book explores how busyness is harming productivity and why it is important to take regular pauses. The NBOA creatively used the author’s two-minute videos to host facilitated discussions and a companion all-staff reflection session.


Another component of building leadership capabilities is incorporating professional certification and leadership assessment as building blocks for continuous learning and improvement. It is an opportunity for employees to increase their business acumen, look inward, and discover strengths

and improvement areas for confident and capable leadership. Both organizations incorporate tools such as the DiSC® Profile (a personality test on work style) and others to build leadership capabilities. Skill gap assessments are also necessary building blocks in this process, especially as shifts continue in the workplace.

Innovation, Process Improvement, and Effective Leadership

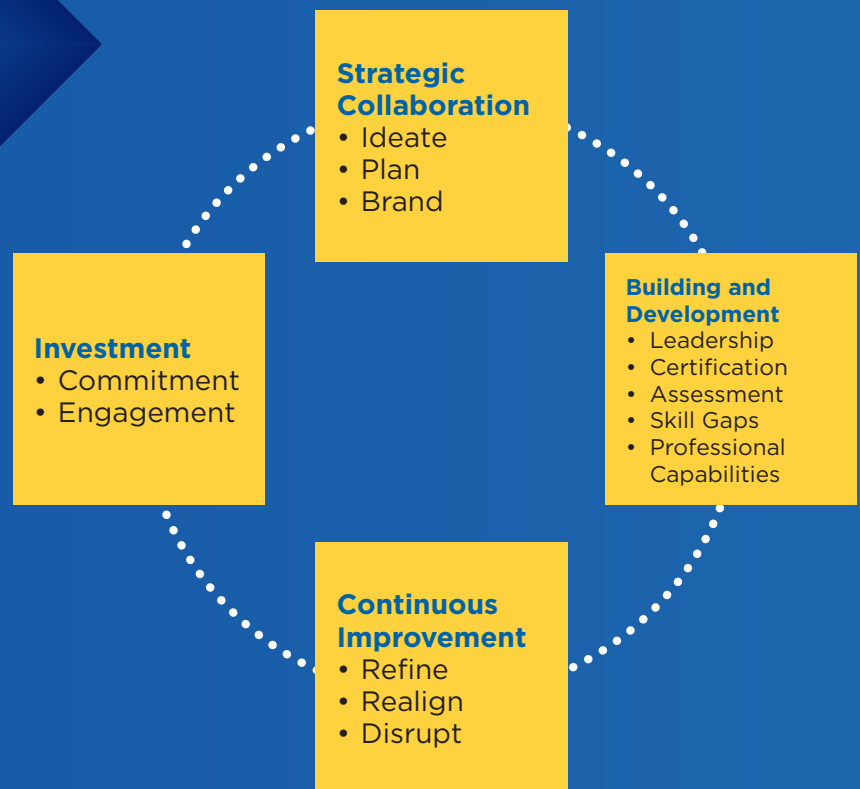
Building leadership acumen in employees at all levels builds bench strength. It is a shared responsibility that catalyzes change and requires individual and organizational commitment. Leadership skills develop over time. As a result, employees will generate innovative ideas, collaborate more frequently, and implement process improvements and radical change that move organizations forward.

Organizations taking a holistic approach use a transformational lens instead of viewing leadership as a set of transactions. For example, NBOA uses the five tenets of respect, trust, expectations, accountability, and collaboration as a guide and lens to gauge impact. The SPJ uses change and growth in the journalism profession as a transformational lens to guide their approach to development.

High-performing organizations look inward and outward through environmental scanning, planning, and pivoting. They ultimately adapt their approach to empower employees to lead, flex their learning muscles, and advocate for change that will bring more innovative, efficient and effective ways to serve clients, members, and partners. 

WHAT'S NEXT?

- Add a transformational leadership lens
- Start small or build on current internal capabilities
- Add employee leadership development as a strategic priority
- Build an internal model and brand it
- Build internal teams dedicated to leadership, inclusion and staff development
- Seek and support internal/external training and certification for staff
- Upgrade internal organizational tools and provide access to expert training
- Assess team skill gaps with a supportive structure to impact change



CELESTE SMITH, CAE

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THE FOUR MENTOR ARCHETYPES

YOU NEED IN YOUR PROFESSIONAL CIRCLE

By Amy Thomasson, CAE

The data isn't surprising: Mentorship (or the absence of mentorship) has a distinct, quantifiable impact on your career.

According to a Journal of Applied Psychology analysis of 43 mentorship studies, employees who receive mentoring are more likely to obtain higher compensation, a greater number of promotions, and higher overall career satisfaction.

If we know mentorship is critical to career success, why are so many professionals struggling to secure mentoring relationships? "As human beings, it's difficult for us to ask for what we want or need, so it's hard for someone to ask another person to mentor them," says Cecilia Sepp, CAE, CNAP, CEO of the 501c League. In fact, the need for mentoring guidance has been especially apparent in association management. "In July 2018, I was reading a post in ASAE's Collaborate community where a member was again asking about a mentoring program. As I was typing a reply to the person asking the question, I decided I would start a mentoring program to help people connect. I found a need in the market and created a program to fill it."

While the pathway to developing meaningful, personal mentoring relationships is unique for every individual, there are four mentor archetypes that have served me well in my career journey that may help to spark some inspiration in you.



AMY THOMASSON, CAE

AMY IS VICE PRESIDENT, MARKETING & COMMUNICATIONS AT CURE SMA. AMY HAS MORE THAN 17 YEARS OF EXPERIENCE IN MARKETING AND NON-PROFIT MANAGEMENT.



• While the pathway to developing meaningful, personal mentoring relationships is unique for every individual, there are four mentor archetypes that may help to spark some inspiration in you.

The Impartial Impactor



An impartial impactor is an individual who is not a current colleague but has a strong understanding of your role and industry. They can provide you with objective feedback, as there is no personal stake in your results other than the goodwill of guiding a fellow professional. In my journey, that individual is Scott Oser, president of Scott Oser Associates, with whom I was connected via the 501c League.

“I think it’s valuable and actually recommended for mentees to have a mentor outside their organizations,” says Oser. “Someone outside of your own organization will have a different perspective than an insider. They will be experiencing different situations and different people on a regular basis and having that variety in a mentor can be very valuable.”

The Attitude Adjuster



An attitude adjuster is a coach, not a cheerleader. This is an individual whose leadership and positivity inspire you, but who is also comfortable providing you with a perspective or attitude recalibration when needed. “Your attitude plays a vital role in the outcome of your journey,” says Burt Blanchard, a former colleague who also serves as my attitude-adjusting, inspiration-giving mentor. Blanchard is the director of membership for InterAction and has more than 20 years’ experience in non-profit management. “In keeping a positive attitude, make sure it’s a real one, and one of inquisitiveness. Keep your outlook not only on exploration but also the joy of possibilities and discoveries. That will drive you to interesting connections, experiences, and outcomes, and that’s the message I hope to convey to mentees.”



RELATED WEBINAR

Allyship, Mentorship, Sponsorship: What Does it Look Like and How Can I Participate? | July 11, 2023 @ 12:00 pm CDT



SCAN ME



The Office Oracle

An office oracle is an individual whom you currently work with. They have history and tenure at the organization and can assist you with navigating the unique politics, policies, and personalities of a new organization or role. For example, last year I joined Cure SMA, a nonprofit organization that supports people with a rare neuromuscular disease called spinal muscular atrophy.

I've been fortunate enough to have several office oracles. From the Chief Operating Officer who guided me through my first board meetings and budgets at the organization to the Vice President of Development and Events who has helped me navigate the changes of working with a fundraising-driven organization rather than a membership-driven organization. These colleagues have provided me with insight and perspective as well as friendly faces to help me feel confident in my new adventure.



The Path Paver

The path paver is an individual who is further along than you in your desired career trajectory. Path pavers help you see your own possibilities reflected in the journeys of others. Personally, I have had the benefit of connecting with a handful of CEOs, entrepreneurs, and volunteer leaders over the past several years who have served as seminal guideposts at various points in my career journey, likely without even knowing I viewed them as mentors.

The path paver can be the most elusive type of mentor as these individuals are in high demand for mentorship and typically serve in demanding roles. While you may not find a singular path paver to meet your mentoring needs, the culmination of wisdom found from even a few brief moments of interacting with one of these leaders can be the impetus for meaningful change. [F](#)



THIS ARTICLE WAS ADAPTED AND UPDATED FROM "THE MENTORING MIX: OPTIMIZING YOUR PERSONAL AND ORGANIZATIONAL MENTORSHIP EFFORTS" WHICH RAN ON MAY 3, 2019, ON FORUMMAGAZINE.ORG.

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New Power Leadership can be applied to all aspects of association management. Whether you're leading a team of staff members, or you are leading volunteers on a project, collaboration and transparency are key.



TOMORROW IS NOW

Look to the pages of this issue of FORUM for ideas on adopting a modern leadership style. Everything else about the world is changing. Isn't it about time our ideas about leadership changed as well?



INTRAPRENEURSHIP

"A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves."

LAO TZU



MIKE NORBUT,
MSJ, MBA

MIKE IS VICE PRESIDENT OF BUSINESS DEVELOPMENT FOR ASSOCIATION MANAGEMENT CENTER, BASED IN CHICAGO. HE CAN BE REACHED AT MNORBUT@CONNECT2AMC.COM.

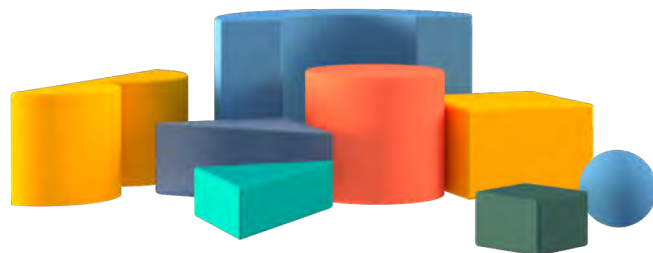
Association Professionals Explore the Merits of Being a Generalist V. Specialist

By Mike Norbut, MSJ, MBA

It's a well-known revelation that virtually no one goes to school to be an association professional.

Some of us even found our association career completely by accident. But while our path to the association community may have been a circuitous one, our career stories within the field can be equally intriguing. Paths seem to fall into one of two primary categories: “Generalists,” whose roles might encompass a variety of different tasks, and “Specialists,” who might focus more intensely in one area or department.

To learn more about the differences between these types of opportunities, FORUM interviewed four association professionals to learn what they like about the path they've chosen.





Nikki Palluzzi, CAE
Senior Director, Member Services & Experience National Association of Personal Financial Advisors (NAPFA)

Please tell us a little bit about your association background and your current position. How did you end up at your current association?

I started right out of college at Smithbucklin, working on membership and programs for technology user groups. It was a great place to learn a lot, and I credit my time there for connecting me to amazing people in the industry and gaining so many skills that I've taken with me through my career. After almost 10 years, I was ready for a new opportunity, and decided to join NAPFA to focus my time on membership. Since then, my portfolio has grown to include DEI, volunteer management, running its foundation, and several other areas within the association.

Do you consider yourself to be a “generalist” or a “specialist?” Why?

I'd say I'm a generalist who has had the opportunity to use that to become a specialist in a few areas. I've always been someone who likes to raise their hand when something interesting comes along, whether it's specifically tied to my current job role or not. Luckily, with a job in membership, it's easy to always make the case that something new is tied into membership! Being a generalist means I'm not boxed into doing the same thing over and over—I'm able to expand the portfolio of programs I work on or skills I can learn.

What do you like best about your current environment?

NAPFA is an organization with 10 staff members, so we must be nimble and flexible, and I love that. It means that when we start a new program, if I'm interested in it, I can get involved with it in some way. Some of my very favorite parts of my job, like leading our DEI initiative, were not initially pitched to me, or even created when I first came on board seven years ago.

Being a generalist means that I can fulfill my need to be constantly learning new skills or taking on new projects. It also means I'm able to connect the dots between projects because I have a high-level view of so many programs within the association. For example, while managing the foundation I've been able to see so much potential for collaboration with the association that we didn't do before—because I'm also the Senior Membership Director, I can easily see where those areas are and then execute on them!

What has surprised you the most about being a generalist or a specialist?

Early in my career, the term generalist felt negative to me, like it meant I wasn't great at anything, but instead that I could cover ground in a lot of areas without much expertise anywhere specific. I know now that nothing could be further from the truth—it's because of my strong skills in time management, volunteer management, and understanding my association that allows me to be able to take on programs in different areas and manage them all seamlessly. I love that I'm not boxed into one specific area, but that I have an opportunity to really go where the highest need for the organization is, or where I'm passionate about something.

If you had to offer advice to an early careerist or someone entering the field, what would you say?

It's okay to not specialize in one area! Being exposed to different areas of association management, programs, or organizations will help you to really understand what associations are all about and will give you an edge when you're making your next career decision. If you work on several different programs or projects, you're better poised to make a change inside or outside your current organization when you're growing your career. Also, always raise your hand! I've gotten to work on such meaningful projects just by letting my bosses know that I am always open to shifting my role for something interesting or new. That benefits the organization by showing your supervisor that you're a team player, and it benefits you because you're able to keep learning and growing your skillset!



Jonathan Adams, MBA, CAE
Information Technology Director
Water Quality Association (WQA)

Please tell us a little bit about your association background and your current position. How did you end up at your current association?

I have been with the Water Quality Association since 2015, and I currently serve as the IT Director. I found the job posting online and took the position with a solid understanding of WQA's IT needs, but only a basic idea of what a trade association actually was.

In my first few years at WQA, I very much saw myself as an IT professional working for an association. As I began to get more involved within the association community, my perspective shifted, and I began to see myself as an association professional who works within IT.

Do you consider yourself to be a “generalist” or a “specialist?” Why?

To me, it's more of a spectrum rather than one or the other. My expertise is definitely rooted in technology, but through work and volunteer opportunities, I've been fortunate to work alongside and learn from some amazing people across different industries and roles. As a result, the needle has slowly moved from specialist to generalist. Right now, I'd say I'm somewhere in the middle, leaning a bit towards generalist.

What do you like best about your current environment?

I'm really big on collaboration. Within WQA, nobody works in a bubble. Our culture is centered around encouraging positive and effective collaboration. In situations where that isn't happening, we address it openly and directly.

Within the broader association community, it's remarkable to witness the level of sharing, support, and encouragement that people offer one another. This openness and generosity often come from a place of gratitude, as we have all received support,

encouragement, and wisdom from others in the past. It creates an amazing cycle where we all help each other. As a result, we can make a more significant impact on our associations which in turn positively impacts industries and communities.

What has surprised you the most about being a generalist or a specialist?

Honestly, it's the sheer amount of new information and experiences out there. Whether it's the new complexities and considerations for AI or innovative new membership models, as my experience and understanding grows, I am surprised by how much there is to learn and understand. The goal post for expertise within any domain seems to be continually moving.

If you had to offer advice to an early careerist or someone entering the field, what would you say?

Put yourself out there, be curious, and look for opportunities to engage both within and outside your organization. I've had some fantastic experiences and met some truly incredible people, all because I stepped out of my comfort zone.

: Put yourself out there, be curious, and look for opportunities to engage both within and outside your organization.





Autumn Wolfer, MA
Manager, Dental Society Outreach
American Dental Association (ADA)

Please tell us a little bit about your association background and your current position. How did you end up at your current association?

I was first introduced to the world of association management when I was hired as a marketing coordinator at Smithbucklin. It all sort of happened by accident. After four years at Smithbucklin, I've spent the last 12 years in various roles at several standalone associations. I've worn a lot of hats over the years and have done everything from sending blast emails and press releases to selling exhibit hall space, launching an online community, and developing membership and marketing plans. In 2018, at the referral of a friend, I was hired in my current role as Manager, Dental Society Outreach at the American Dental Association and I absolutely love it.

Do you consider yourself to be a "generalist" or a "specialist?" Why?

In my current role at the ADA, I would definitely consider myself more of a generalist. As a tripartite organization, our members join at three different levels: ADA (national), 53 states and territories, and 400+ local dental societies. In my role, I serve as somewhat of an association consultant to the state and local dental societies. The ADA has more than 400 employees, but the state and local groups only have a fraction of that. They often struggle with capacity and staff resources, which is where my role comes in. I work with several state and local society executive directors and staff not only as a liaison to the ADA, but also to provide assistance and resources related to initiatives such as board orientation, strategic planning, and leadership training. All of our team members are also certified DEI facilitators.

What do you like best about your current environment?

My current role is really fulfilling because it encompasses everything that I love about working in the association management industry. And my absolute

favorite part about association management is the people. I've always said one of the best things about working with associations is that you get to work with volunteers who are there because they want to be there, not because they have to be. It's something truly unique to our profession that has always made me feel really fortunate that I get to do this work.

With over 159,000 shared members across the country, it's impossible not to look at our organizations in a more holistic way. Strategizing ways to ensure member value is equally distributed across the multi-levels of the tripartite takes collaboration and creating alignment is important. I'm a true association nerd and absolutely love working with my states to develop their strategic plans and identifying opportunities for the future.

There are wild demographic and psychographic disparities across the dental population today. Dentistry is changing fast and the new generation of professionals are practicing in entirely different ways than their seasoned counterparts. Assessing this changing landscape and taking a deep dive into member needs in collaboration with our states and locals is so interesting to me. The strategic work and data analysis involved with this is truly one of my favorite parts of the work we do.

What has surprised you the most about being a generalist or a specialist?

I think one of the greatest aspects of working in association management is that one day is never the same as the last. My colleagues and I say this often when talking about our work with our state and local societies: "when you've seen one state, you've seen one state."

Many people describe the nature of our work as akin to wearing many hats. I think what I've learned throughout my career is that whether you're a generalist or a specialist, at one point or another we all wear the "membership" hat. Our members, regardless of the industry, are the sole purpose for our organizations. They are why associations exist. It's fascinating to me to learn about what drives an individual's decision to join an organization. At the end of the day, we get to help people feel more fulfilled—personally and professionally—and I feel very fortunate to be a part of that.

If you had to offer advice to an early careerist or someone entering the field, what would you say?

To someone just starting out in association management, I would definitely encourage them not to be afraid to explore what is interesting to them. I started my association career in marketing and now I'm more involved in overall organization strategy and I love it. Working in this field gives you an amazing opportunity to explore different paths, whether that's marketing and sales, emerging technology, finance, executive management, etc. Association management truly does offer something for everyone and is, I think, one of the most perfect environments to be in to figure out what you're truly passionate about for a career.



Brie Bingham
Membership and Marketing Manager
Cremation Association of North
America (CANA)

Please tell us a little bit about your association background and your current position. How did you end up at your current association?

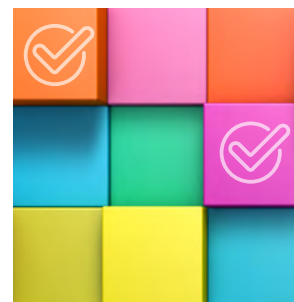
I come from the 501(c)(3) side of the nonprofit sector, only discovering associations while completing my Masters in Nonprofit Management and finding CANA through a staffing agency. Now, seven years later, I am the Membership and Marketing Manager in a staff of seven for our international trade association of more than 3,500 members. In addition to database maintenance and member service, I have taken over many of the promotional strategy and content marketing responsibilities for CANA.

Do you consider yourself to be a “generalist” or a “specialist?” Why?

A generalist, definitely. I'm a proud utility player and pinch hitter. I love seeing our year-end accomplishments and knowing I contributed to every one of them. I love that my volunteers see me as the person they can contact about anything because I'll have the answer (or will know where to find it). I love that each day is different with new projects and challenges.

What do you like best about your current environment?

Fortunately, I learned many years ago that I thrive in small organizations because the environment allows room for my generalist nature to flourish. Without the silos of larger staffs, I can participate in every project. I believe asking questions and discussing strategy across departments encourages innovation and proactive problem-solving. Plus, by knowing something about everything we're doing, I can be better at my job: both knowing when changing something in one place will impact something else down the line, and as a resource to my members and taking a holistic approach to promoting our association's work.




I believe asking questions and discussing strategy across departments encourages innovation and proactive problem-solving.

What has surprised you the most about being a generalist or a specialist?

Some of my colleagues are definitely specialists! It certainly takes all sorts to make an association go 'round, and they are very happy and successful as experts in their field. As a team, we pool our skills to work together and support one another to keep our association moving forward.

If you had to offer advice to an early careerist or someone entering the field, what would you say?

I have always thought that learning what you don't like to do is as valuable as learning what you do. As a generalist, I have so many opportunities to try new things and, hopefully, set aside what doesn't fit. And, even if you're not a generalist, starting at a small association can allow you to explore many roles while you're figuring out what you want to specialize in. 

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AI FOR ASSOCIATIONS— WHERE DO WE BEGIN?

By Jeanne Sheehy, MBA

“AI is one of the most important things humanity is working on. It is more profound than, I dunno, electricity or fire.”

Google CEO Sundar Pichai, speaking at a town hall event in San Francisco in January 2018

The buzz surrounding AI is everywhere.

Three years ago, I did a presentation called “AI as a Tool to Improve Operations and Advance Association Missions” at Association Forum’s SmartTech virtual conference, and here we are again trying to make sense of where we can leverage this game-changing technology.



ALERT: THE FOLLOWING SECTION OF THIS ARTICLE WAS WRITTEN ENTIRELY BY CHATGPT (AN AI CHATBOT):

Artificial intelligence (AI) has been in use for several years and has made significant contributions to various fields, including healthcare, finance, transportation, and many others.

Here are some AI technologies that have been in use for years:

- **Machine Learning (ML):** Machine learning is an AI technology that allows computer systems to automatically learn and improve from experience without being explicitly programmed. It has been used in various applications such as fraud detection, recommendation systems, and image and speech recognition.
- **Natural Language Processing (NLP):** NLP is a branch of AI that enables computers to understand, interpret, and generate human language. It has been used in applications such as chatbots, virtual assistants, and sentiment analysis.
- **Computer Vision (CV):** Computer vision is an AI technology that allows computers to interpret and analyze visual information from the world. It has been used in applications such as object recognition, facial recognition, and image classification.
- **Robotics:** Robotics is a field of AI that deals with the design, construction, and operation of robots. It has been used in various industries such as manufacturing, healthcare, and agriculture.
- **Expert Systems:** Expert systems are AI technologies that emulate the decision-making abilities of a human expert in a particular domain. They have been used in applications such as medical diagnosis, financial analysis, and quality control.
- **Neural Networks:** Neural networks are a type of AI technology that mimics the functioning of the human brain to learn and improve. They have been used in various applications such as image and speech recognition, natural language processing, and game playing.

These are just a few examples of AI technologies that have been in use for years. With the rapid pace of technological advancements, it's likely that we will see even more AI technologies emerge and become commonplace in the years to come.

ALERT: NOW BACK TO A HUMAN DOING THE WRITING!

The point of sharing the above copy is to highlight that we all enjoy the benefits of convenience and personalization made possible by AI on a daily basis:

- YouTube suggests videos.
- Gmail finishes your sentences.
- Facebook targets you with ads.
- Spotify learns the music you love.
- Alexa and Siri answer your questions.
- Amazon predicts your next purchases.
- Netflix recommends shows and movies.
- Google Maps routes you to your destination.
- Apple unlocks the iPhone by scanning your face.
- Tesla Autopilot steers, accelerates, and brakes your car.
- Zoom automatically transcribes your recorded meetings.

From a transformation perspective, AI can be used to drive efficiency, grow revenue, and increase reserves for an association.

So, how can we leverage the power of AI in association management?

Well, from a transformation perspective, AI can be used to drive efficiency, grow revenue, and increase reserves for an association.

: “You don’t have to become a machine learning engineer or data scientist to take advantage of what AI enables. You simply have to understand what is possible with smarter technologies and apply them to your business and career.”

EXCERPT FROM MARKETING ARTIFICIAL INTELLIGENCE: AI, MARKETING, AND THE FUTURE OF BUSINESS BY PAUL ROETZER AND MIKE KAPUT

The best way to get started with AI is by doing quick-win pilot projects with narrowly defined use cases or problems to solve and high probabilities of success. There are two natural categories of association management to consider for putting together your own use case. The elements to look for in these cases include data driven tasks, repetition, or things that are making

a prediction. The value is usually either an Efficiency Lift (time or money saved) or a Performance Lift (increased probability of achieving business goals).

Think about the work in your area of association management and what the day-to-day tasks are. Are they data-driven? Are they repetitive? Do they make a prediction? Or is there a problem to solve that could be done with an AI tool?

Create a chart to evaluate each case and research any AI tools out there that could be used. This will provide some concrete steps in using AI in your association TODAY.

So, consider each use case and think about the potential time and money saved, as well as the increased probability of achieving your association’s business goals. Rank each use case on a scale of 1-5.

1 = No value
2 = Minimal value
3 = Moderate value
4 = High value
5 = Transformative

Once you’ve identified some use cases and possible AI tools, you will be well on your way to testing the true power of AI in association management. Good luck! [F](#)



JEANNE SHEEHY, MBA

JEANNE IS THE CHIEF MARKETING OFFICER AT BOSTROM. SHE HAS MORE THAN 20 YEARS OF BRANDING, GLOBAL MARKETING STRATEGY, AND INTEGRATED MARKETING EXPERTISE. SHE IS ALSO A SPEAKER ON DIGITAL TRANSFORMATION, AI FOR ASSOCIATIONS, AND INTEGRATED MARKETING CONCEPTS IN ASSOCIATION MANAGEMENT. JEANNE IS A MEMBER OF ASSOCIATION FORUM’S 2023-24 CONTENT WORKING GROUP.

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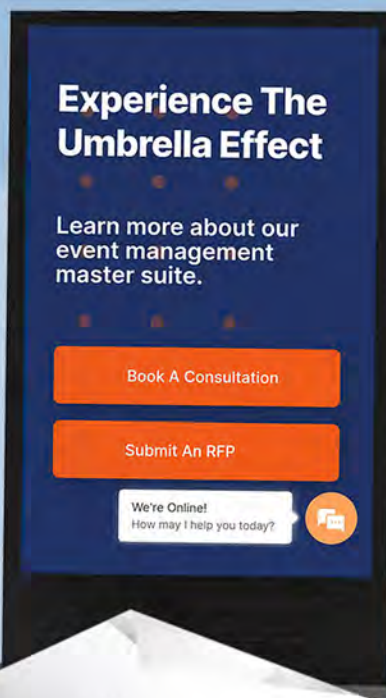
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INNOVATION AND INTRAPRENEURSHIP

IN ASSOCIATIONS



By C. David Gammel, FASAE, CAE

Intrapreneurship focuses on fostering an entrepreneurial mindset within an organization and creating solutions to market needs.

I recently sat down with Guillermo Ortiz de Zarate, the Chief Innovation & Information Officer at the National Council of Architecture Review Boards (NCARB), to discuss the role of intrapreneurship in associations.

NCARB previously had a manual process for matching volunteers with member interest. Guillermo's own entrepreneurial mindset and passion for inclusion led him and his team to develop Lineup, a software solution that connects expertise with association needs. After seeing success with architecture licensing boards, Lineup expanded into other industries with similar needs for assembling diverse talent and assessing performance.

Guillermo and his team are well-known for their innovative approach, utilization of talent, and expertise in the association marketplace. He discusses what other association leadership should consider regarding intrapreneurship and how to balance the risk associated with it.



Q Why is an entrepreneurial mindset important for associations?

A Sometimes associations can't escape the mindset of being a not-for-profit, so naturally, they work on building offerings that fall under their membership structure. New offerings should answer three main questions: Are they desirable? Are they feasible? Are they viable (who is going to pay for it?) When creating offerings under membership, viability comes from the math of how much that new offering can increase conversion and retention rates. This doesn't have to be the case.

Entrepreneurship is finding a need or a pain point in your membership audience or the environment around your membership that is real and worth solving. We found an opportunity to solve a problem we were experiencing, but it was outside of our immediate community. We then investigated if there was a way to monetize it, and that's a completely different mindset that many organizations are afraid to embrace.

Q How have you balanced the risk-taking that comes with innovation with the need for stable ongoing operations and consistency in delivering on your mission?

A This is a cultural revolution where the idea is to continuously innovate, take small risks more often, and champion learning from failure. If you need to go to a two-week summit with your leadership team to try to solve a big problem, that's not innovation; you're a little late and you're actually in danger.

It's important to create a culture where people feel safe to try new things in controlled environments. This makes the risk more tolerable. Change is not linear, so if you get into the habit of taking small risks and making small changes that are outside of your risk tolerance, you might be staying closer to making big changes than you realize.

Q What would your first steps be if you were coming into a new organization and you wanted your staff to be able to make those small experiments and take small risks to learn and ultimately advance the organization?

A I would solicit thoughts and ideas from the staff, especially the front line, people who are seeing the reactions of the membership firsthand. They know what pain points the association could solve for the members. I would then pick a few of those ideas and run a couple of small experiments to see if there is evidence of their worth. The smaller the idea, the better. If there is worth, and the idea is implemented, the key is to give proper credit to the people who thought and worked on it and inspire others to do the same.

At NCARB, we accept ideas and then run them through a structured framework that hopes to obtain evidence to answer the three questions we mentioned:

-
1. Is this feasible?
 2. Is it desirable?
 3. Who's going to pay for it?

This is a cultural revolution where the idea is to continuously innovate, take small risks more often, and champion learning from failure.

Q What do you have going on in the innovation and entrepreneurial space at NCARB that we can share?

A We try to understand where there is an opportunity to make an impact in a way that is directly related to our mission. Recently, we conducted research in the test preparation provider space and noticed the average spending of a candidate for licensure was about ten grand. That amount is unattainable for some people, so we started running some experiments to see how we could help. We began with a very small practice exam that we provided for free and we saw an extremely positive response and impact. Now, we are focusing on what else we can do to continue the positive change in that area.

When you find the factor that has the most influence on high pain points and can affect that leading indicator, you might have something worth trying.

Q Tell us a bit about Lineup and what's new with that offering.

A Lineup is a different type of volunteer management system that serves more as a talent and expertise management software. We wanted more representation of diverse perspectives in our volunteer committees, and we wanted to be more

intentional about the competencies needed in these groups. As a result, we built a tool that allows us to do competency-based curation of communities. We later realized that the application had applicability beyond volunteers; it can help with any type of team or group an organization might need to find, assign, engage, develop, and evaluate subject matter experts.

We were able to pitch our board to commercialize Lineup, and it is now in a great position to help many organizations achieve diversity, equity and inclusion initiatives and competency-based outcomes.

Q What's the biggest misconception about innovation and intrapreneurship at associations that you would like to dispel?

A It is the idea that innovation is lightning that only strikes once. I think that you need to enable teams to try multiple things in smaller bites. It is counterintuitive because people want their projects and offerings to be perfect, but there is more risk in spending two years perfecting an offering that nobody wants than conducting an experiment that proves you wrong in just a few days.

C. DAVID GAMMEL, FASAE, CAE

C. DAVID IS A CHIEF PRACTICE OFFICER AT MCKINLEY ADVISORS, AN ASSOCIATION CONSULTING GROUP. DAVID IS A LONG-TIME EXECUTIVE AND CONSULTANT IN THE ASSOCIATION INDUSTRY AND SERVED AS EXECUTIVE DIRECTOR OF THE ENTOMOLOGICAL SOCIETY OF AMERICA (ESA) BEFORE JOINING MCKINLEY. HE HAS SERVED AS A BOARD MEMBER FOR THE AMERICAN SOCIETY OF ASSOCIATION EXECUTIVES (ASAE), AS AN OFFICER FOR THE COUNCIL OF ENGINEERING AND SCIENTIFIC SOCIETY EXECUTIVES, AND AS A FOUNDING MEMBER OF THE EXECUTIVE COMMITTEE OF THE SOCIETIES CONSORTIUM ON SEXUAL HARASSMENT IN STEMM.



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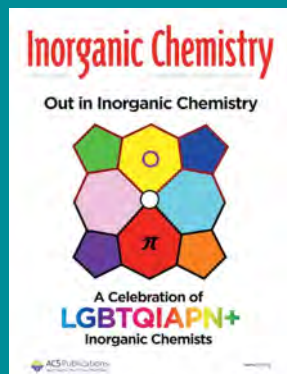
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THE AMERICAN CHEMICAL SOCIETY MAKES A POLICY CHANGE

with an Eye Towards Inclusivity

By Kim Kelly, CAE

Artwork featured as part of ACS Publications Diversity & Inclusion Cover Art Series. From top left clockwise: Journal of Medicinal Chemistry art by Carolyn J. Straub; Analytical Chemistry by Xiangkun Elvis Cao; The Journal of Organic Chemistry art by Giovannia Barbosa; ACS OMEGA art by Abdullahi Tunde Aborode; Inorganic Chemistry art Abhik Ghosh.



KIM KELLY, CAE

EDITOR-IN-CHIEF
ASSOCIATION
FORUM

OWNER,
KIM KELLY
CONSULTING

Our approach is to embed DEI into everything we do. These initiatives can come from anywhere—editors, the community, or dedicated staff who are looking at these things on a day-to-day basis.

The American Chemical Society (ACS) was founded in 1876 and is one of the world's largest scientific organizations. Their mission is to advance the broader chemistry enterprise and its practitioners for the benefit of Earth and its people. ACS Publications is a division of ACS and is home to more than 75 journals. In addition, ACS publications produces eBooks, scientific programs, and a news magazine titled "Chemical & Engineering News."

With this scale of publishing, ACS Publications works with many scientist authors. When one author and transgender advocate tweeted about the organization's name change policy, they sprang into action. Following is an interview with **Beth Craanen**, MS, Director of Global Editorial Operations, and **Shaina Lange**, MPS, Senior Manager of Publishing Integrity.

Association Forum spoke with ACS Publications in late 2022 to find out more about this policy, as well as other Welcoming Environment efforts.

THIS INTERVIEW TRANSCRIPT HAS BEEN EDITED FOR LENGTH AND CLARITY

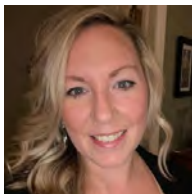
Association Forum: Tell me a little bit about the DEI initiatives that you've implemented at ACS Publications.

Shaina Lange: Sure. DEI has always been a priority for the ACS Publications and our journals program. But I think the world events of 2020 really catalyzed us and forced us to re-examine a lot of the things that we were doing in our journals program. In June 2020 we published a joint editorial with our leadership, Board of Directors, and Editors-in-Chief, where we committed to reexamine our efforts, understand the disparities, and address biases in our publishing program and part of the larger chemistry enterprise. Our approach is to embed DEI into everything we do. These initiatives can come from anywhere—editors, the community, or dedicated staff who are looking at these things on a day-to-day basis.



AF: Wonderful. Beth, I know we talked a little bit about the name change policy. Can you give me some more information about that?

Beth Craanen: Yeah, and Shaina really spearheaded this, but essentially we've implemented an author name change policy to support that aspect if individuals are changing their name within their life. Shaina, do you want to dive into this? Cause I know this is a really great story and one that came from essentially a community member that tweeted and that really had major impact as to why we implemented this.



Lange: Yeah, sure. And I have to give full kudos to folks on the team. This was before I moved into this role, and so there were a lot of people involved in making this happen. As Beth said, we were called to action on Twitter by a transgender chemist and advocate, Irving Rettig, who was already a vocal advocate in this space. They were personally dealing with having to change their name on a prior publication and on their CV, and the ACS did not have a mechanism to do that in an inclusive way. After that tweet was shared with internal stakeholders, we ended up reaching out to Irving. Irving was also part of a group called the Gay and Transgender Chemists and Allies (now called ACS Pride), a sub-division of the ACS Division of Professional Relations. And so, with more understanding of the challenges faced by this community and issues with our name change process, there was unanimous support inter-

nally that we needed to question our current process and figure this out.

Our name change policy, as Beth noted, recognizes that people can change their names for a variety of reasons including gender identity, marriage, divorce, religious conversion, or personal preferences. While this affects a lot of researchers, name changes disproportionately affects researchers who are transgender, non-binary, or gender diverse, and women. And these are people who are already facing a lot of other challenges throughout their careers. Historically, when an author wanted to change their name on an article, they were challenged by these restrictive authorship policies where they could change their name but it would involve a formal correction of the record. This entailed notifying or even getting approval from their co-authors, providing legal proof of their name change, and a linked and public notice with an explanation of the update.

There are so many sensitivities surrounding a name change that it just leaves researchers with two poor options. Researchers would either take the formal correction path and risk potentially outing themselves or sharing those sensitivities, or they would just abandon their previous publications. Both can have negative effects on their professional mobility and career advancement, as well as even personal safety risks.

So, in October 2020, we launched a much more inclusive policy that enables authors to update their names on publications that they published with the ACS. It still protects the article and the integrity of that record, but it also allows them to do that in a way that recognizes how sensitive it is. So, we don't notify anyone else unless they ask us to. We don't ask for any legal proof or documentation or anything like that. We have safeguarding—steps throughout the process to make sure they are who they say they are, of course. But we're able to do that in a way that protects the integrity of the record, meets our business requirements, but more importantly, puts that control in the hands of the author.

AF: That's great. What has been the feedback from members since you've done this?

Lange: It's been incredibly positive. I think [we're at almost] 400 publications that we've been able to update in the last two years. And that dates back to the 1970s. And we've been seeing a lot, especially

when we first launched our policy, on social media around just hearing the impact of what it means for someone to be able to take ownership and claim the work that they've done and in a way that represents their lived identity and the full representation of themselves.

Craanen: Yeah, and one thing I want to highlight is that there were a lot of key stakeholders involved in the process to implement something like this. I think you always have the side of the policy aspect of things and what the policy states, but then also the level of implementation and the change behind the scenes. At ACS, we have nearly 80 journals and over 800 editorial offices. And so, the scope and size of our portfolio is large and the number of authors that we have who have published with us over time is incredible. So, when you think about implementing something like this, it is a very heavy lift and there were a lot of key stakeholders internally that really bought into this project and really supported it, ensuring that this happened. It's amazing what one tweet can do to create a movement, and create more inclusivity for others. We've heard a lot of positive stories about the impact that it's had so far.

AF: Yeah, that's great. Kudos to you and your team for taking that feedback and turning it into something real. So, you also have a cover art initiative. Can you tell me a little bit about that?

Lange: I'm happy to. This is a cool series that started at one of our journals, "Analytical Chemistry," and this was purely the idea of one of the editors there. It's a great example of how one nugget of an idea can really expand into something. Just for context, every journal issue has at least one front cover art, and that's typically representative of an article in that issue. And so within "Analytical Chemistry" and our journals at large, we are asking our editors to think how they can creatively help contribute to a more inclusive journals program. Our editors are fantastic partners and they're the ones who are really in it day-to-day. One of our editors at "Analytical Chemistry," recognized that our journal covers are a really great way of bringing visibility to underrepresented groups and the researchers behind the research that we're publishing.

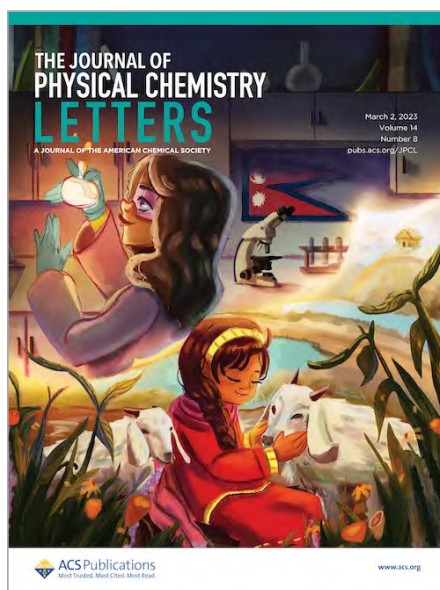
It started out as a really small initiative in that journal. They undertook this initiative to solicit submissions from individuals who were from underrepresented groups. Individuals were able to submit cover artwork as a visual representation of their personal story and experience in chemistry, along with a corresponding editorial describing their story, their experience, and their artwork. They didn't need to have an article in that issue. That series was amazing. The reception was great, and you can check out all the cover art online on the "Analytical Chemistry" site (pubs.acs.org/journal/ancham). It was really successful.

We wanted to give other journals an opportunity to do something similar. So now it's expanded to the whole portfolio. I think we just closed submissions last month and so we'll hopefully see a few more published and, if selected, the artists receive compensation for their artwork and their time. We are also putting some of the art in our ACS store so people can purchase a poster or a print. We've now had several other covers published in the last year or so from "Analytical Chemistry" and other journals. And they're really cool. They cover the spectrum of human diversity. And it's also a really great showcase of the intersection between art and science, which I don't think we usually see on our cover art.

AF: That's very neat. So, are these members submitting the art?

Lange: Yeah. Researchers typically in that field. They might be ACS members as well but they don't have to be. It was kind of a low-level lift. We leveraged a lot of our processes that we already had for cover art and authors can fill out a form to say, "I'd love to have my submission, if accepted, published at this journal," which maybe, you know, is a journal that is in their field or that they would normally publish at. But if that journal has a ton of artwork submissions, here's some other preferences I have for other journals. And the idea is to hopefully accept as many submissions as we possibly can.


AF: Very neat. I love that. These seem like great initiatives. They're really unique things that I haven't heard much about before. Do you have any tips for other organizations looking for ways to incorporate DEI?



The Journal of Physical Chemistry LETTERS cover artwork by Priya Karna and Leah S. Metters.

Lange: Yeah, so that's a great question. I think taking a step back and really looking at (1) what you're already doing in this space. The name change policy was one where we had a policy in place, but now we were looking at it with this new sense of awareness and so examining things that you already have in place and thinking, "does this really allow people to succeed? Everyone to succeed? And especially people from underrepresented groups."

I think the other thing that we're trying to do now that we've made progress on a lot of our initial commitments is where do we go next? Really listening to your community and your membership or author and reviewer base, to really get a sense of what are their needs, what are things that they're feeling, what are the perceptions that they have on their end that maybe we're not aware of? If you have a mechanism of collecting some of that data about their demographics, but also about their experiences and you might get to things that maybe you weren't quite aware of.

Craanen: Yeah. I think one of the things that I've really loved about ACS is that I feel like a lot of our key stakeholder groups are really committed to moving the needle in this space. We know things like representation matter. So, considering systematic things and making sure how you go about it is not exclusive versus trying to be inclusive of those processes. It's also taking steps forward and it's not having to do everything all at once. What are the things that we can do to create better representation? Or things that we can look at that apply? Are we being inclusive on that aspect of things within our systems? And I think there's a lot of steps that you can take to just think about the system and what you've built and how you can break down those barriers to be more inclusive ultimately for your community. 



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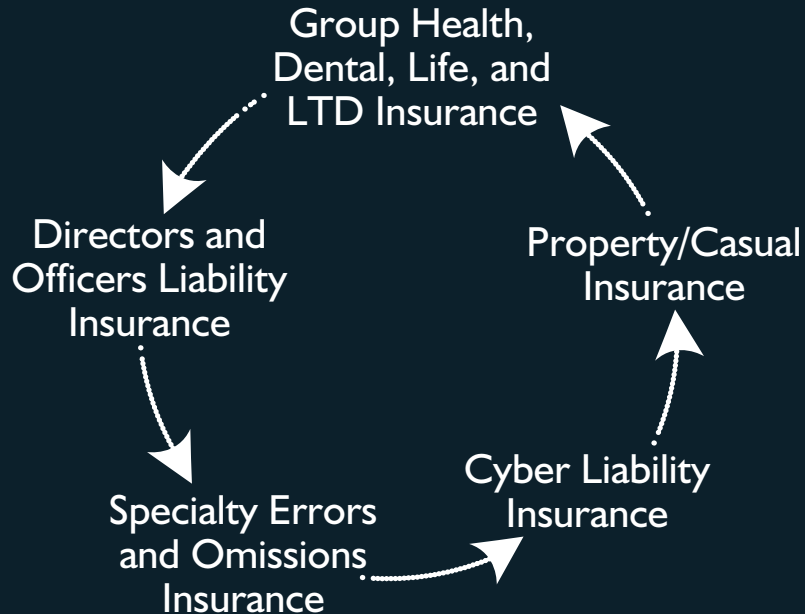
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How Did You Find Your Way to the Association Industry?

Many associations professionals love what they do, but many of us are also accidental association professionals. You may have been working in another field or at a for-profit when a job opening popped up at an association. Not only did you learn that skills transfer amazingly well to this profession, but also that the work is rewarding and meaningful. Or maybe you had a completely different path to your current association...that's why we asked! Read on to see where some of your peers came from and how they found this wonderful profession.



"I came from the corporate side with an accounting and legal administrative background. In 2007, I wanted a change of pace and applied for a membership

position with the Pacific Northwest Chapter of the Professional Golfers Association (PGA) in Washington state. I had the opportunity to work with aspiring golfers on their way to obtaining their PGA status. Helping young professionals reach their dream was rewarding and inspiring. Moving from the Pacific Northwest, I learned that association experience is an asset and I was able to take my skills to trade organizations, and now medical societies.

I have worked with many fantastic members and colleagues throughout my years making life-long friends. I plan to remain in the association industry offering my best to member volunteers working together to accomplish their goals to better serve communities, professionals and their respective industries."

- **Jacqueline Luna-Montes**
- Manager, Membership and Global Programs
- Society of Surgical Oncology

"I was a global marketing director for a software company and our VP of Engineering was a member of the Society of Women Engineers. She used to take me to meetings, and I was amazed by what they did and I loved being around these incredible women. She was then recruited to be their CEO and Bostrom managed them. She brought me to Bostrom and two years later I became a partner there working on multiple associations and haven't looked back since!"

- **Jeanne Sheehy, MBA**
- Chief Marketing Officer
- Bostrom



The Importance of Authenticity in New Power Leadership

I believe the new power leadership style fosters connectivity and collaboration across the ecosystem or community of your organization or association. To create a collaborative and transparent leadership model, you must first be introspective and authentic enough to ensure that you yourself are practicing what you preach, and then setting the example within your organization.

Early in my career, adaptability and authenticity were foundational in my growth. I began my career working in college textbook publishing, partnering with authors who were some of the most brilliant people in the world at leading universities in various disciplines. These were intimidating people. My mentor at the time encouraged me never to put myself in a position of trying to “compete” with our textbook authors as a subject matter expert. Instead, I learned to honor and respect them as the authorities in their field while creating the conditions for them to do their best work as a textbook author; while also contributing my expertise in the publishing business. That taught me authenticity-based respect for each individual’s experience, knowledge, and expertise in collaboration, and it is a lifelong lesson I took with me. It has served me in every aspect of my career, especially now at Smithbucklin.

The leadership of our clients touches virtually every industry, field, and profession. Our job is to collaborate to make those volunteers successful as advocates and leaders for their association. At the same time, we apply our deep knowledge and experience in effective association governance, growth strategies, and business operations and management. Adaptive, situational leadership—based on fostering connectivity and collaboration, and ensuring that we leverage our respective expertise with our client organization leaders—is critical in what we do every day.

I believe people who know me would describe my leadership style as highly collaborative. Most of my early career mentors fell under the more traditional, apathetic style, but I always knew I wanted to lead differently—in fact, some of the most influential mentors I’ve had helped me know what kind of leader I didn’t want to be.

It’s a lifelong journey to achieve a great level of participation and engagement, and garner the input of the voices of people you’re trying to align. I’ve spent decades honing my discipline to ensure I’m involving others. There is often a dichotomy between people wanting to be heard as well as seeking out those who are remaining silent. In these instances, you have to become the cheerleader for your colleagues and organization—inspiring all voices to be heard.

In my work with association boards, I’ve observed that the most successful organizations put personal agendas aside and govern with the best intentions for the organization’s longevity in mind. This shift in leadership stems from the evolution of board governance models: eliminating hierarchy, engaging in thoughtful collaboration and consensus decision-making within an effective governance structure, and implementing diversity of thought and experience into board culture.

If I can stress one thing about leadership, it’s that authenticity is key. There is always a balance you have to find depending on your role and the leadership level in your organization. Still, it comes down to your ability to be vulnerable and genuine in your professional relationships. I live by the rule that you should not ask anything of others that you aren’t willing to do yourself.

At the end of the day, my goal is to lead with authenticity and leave the organizations I serve better than I found them. ■



JIM AND HIS WIFE
ENJOY CHERRY
BLOSSOM SEASON IN
WASHINGTON, D.C.

JIM MCNEIL

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