



Board & Staff Retreat Summary & Recommendations

June 2016



*Charting
Our
Course*

Associations North

Diversity & Inclusion Planning Retreat

June 28, 2016



Today's Goals & Outcomes:

Build Knowledge & Skills

Build knowledge and skills to lead ourselves and others along Association North's diversity and inclusion (D&I) journey.

Be able to more effectively engage in strategic thinking and planning to make more progress on D&I.

Increase Effectiveness

Based on member insights and needs, develop a compelling case for D&I that aligns with existing organizational goals and aspirations.

Associations North will have more clarity about member needs and strategic alignment to advance the D&I effort.

Create Value

Identify success factors, priorities and actions to achieve meaningful and measurable outcomes in the next 12 months.

Associations North will have a value-driven plan to support the D&I effort.

Working Agreements

- Be fully present with your heart & head
- Apply the work to yourself and your work first and foremost
- Listen to understand. Speak to be understood
- Embrace paradox
- Lean into discomfort
- Assume good intent and be aware of your impact
- Seek intentional learning, not perfection. Commit to non-closure
- Respect confidentiality---what is said & done here stays here
- Other needs or suggestions? ... Let us know



ASAE Results

ASAE Assessment Results (August 2015)

Exceeds

- EEO Compliance
- Meeting & Event Planning

Meets

- Mission & Focus
- Board of Directors
- Volunteer Groups
- Senior Administration
- Accountability & Strategy
- D&I as a cost/investment
- Policies
- Identify Safety

Improve

- Membership
- Fundraising
- Retention
- Vendors
- Hiring
- Organization Performance
- Cultural Competency
- Marketing/ Communications



Member Insights

Survey Says...

- 168 completed responses
- A range of perspectives on the value of a D&I effort from “this doesn’t apply to me” to applause for moving forward
- Members Want:

Resources & Education

Survey Demographics

n = 168 completed responses

Member Type: *Top 3 (68%)*

- Professional Association
- Trade Association
- Association Management Company

Survey Demographics

n = 168 completed responses

Member Role: *Top 3*

- Association Professional Staff (22.9%)
- Association President/CEO/Exec. Dir. (22%)
- Association Senior Staff (12%)

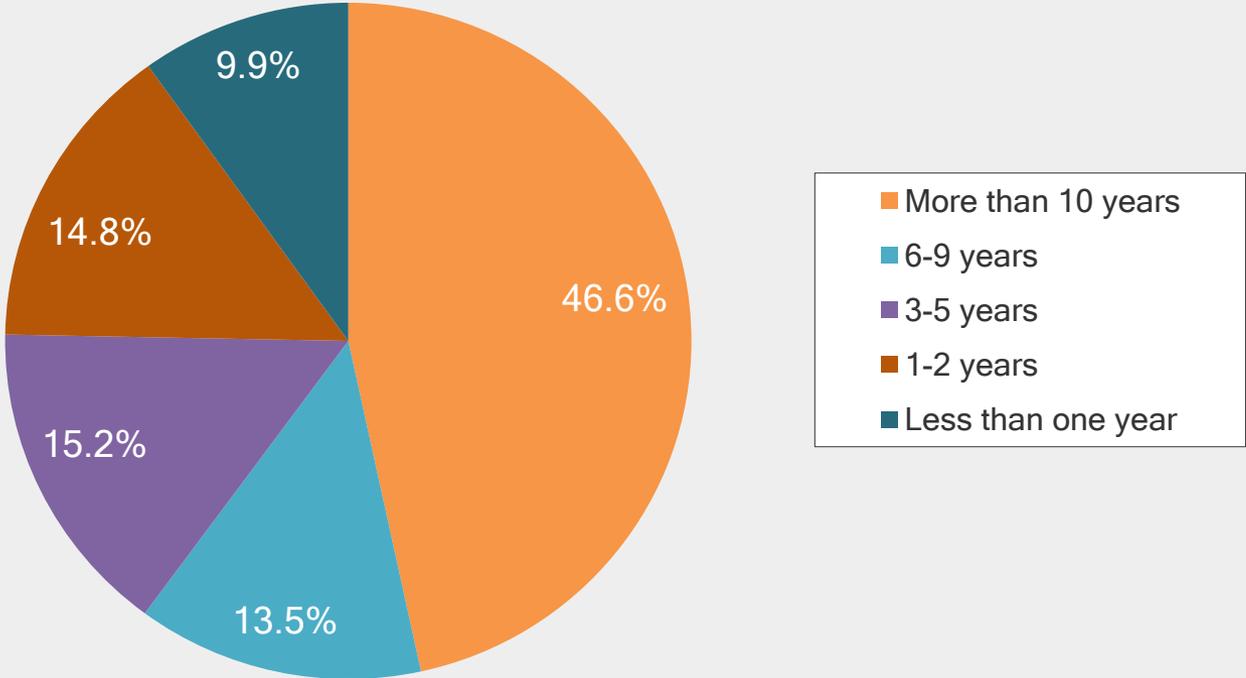
Survey Demographics

n = 168 completed responses

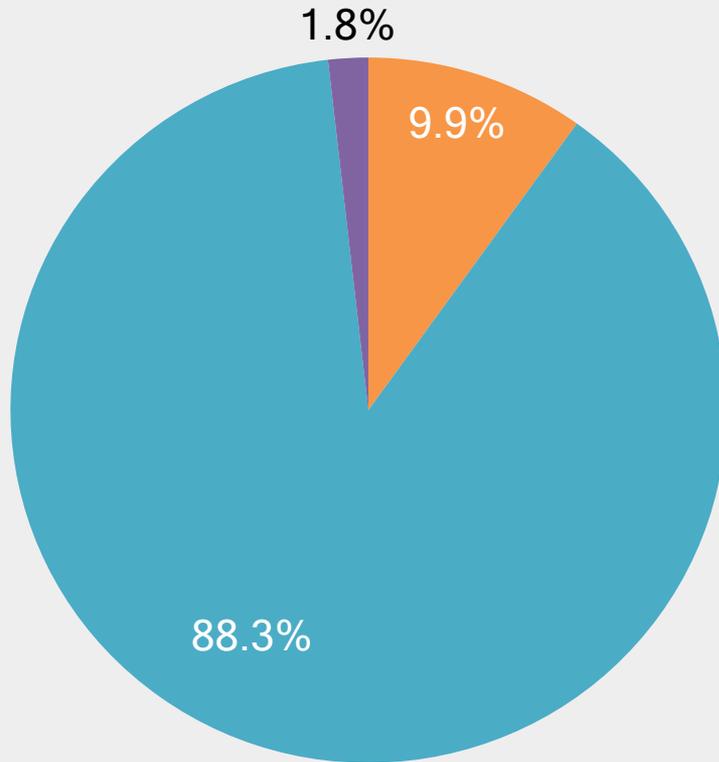
Member Location:

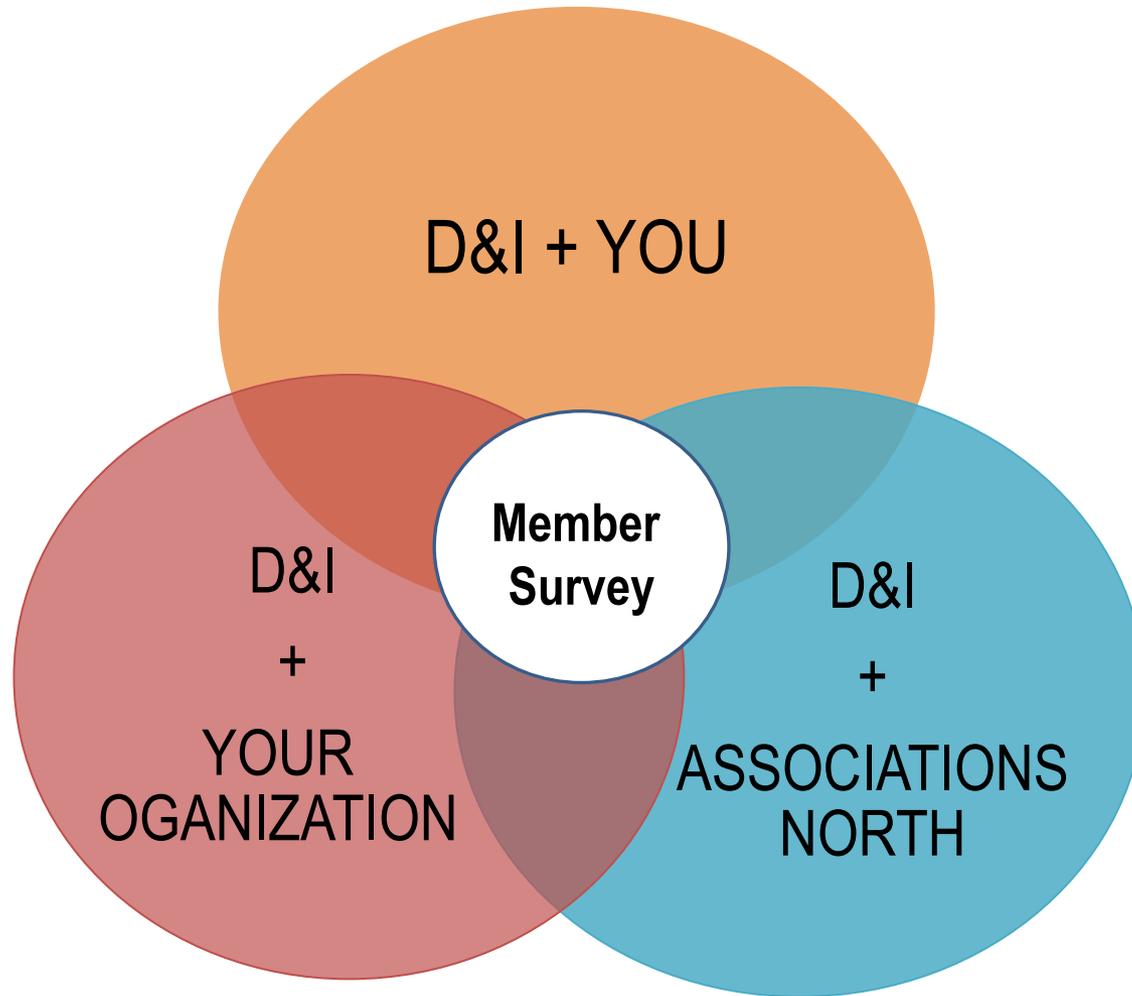
- Over 88 percent – Twin Cities
- 9 percent – Greater Minnesota
- Less than 2 percent – North Dakota
- 0 responses – South Dakota

How long have you been affiliated with Associations North?



Where is your organization located?





Diversity, Inclusion & You

Survey Headlines...

*On an individual level, most members reported an understanding of the role of diversity and inclusion in organizations and are able to work with others across differences, **BUT...***

Diversity, Inclusion & You

Survey Headlines...

- *Most are not actively involved in direct efforts to advance D&I.*
- *Most have not had knowledge or skill building in the past year.*
- *Training & development were cited as most important.*

Diversity, Inclusion & Your Organization

Survey Headlines...

- *Organizations are working toward diversity and inclusion.*
- *D&I practices involve inspiring next generation of talent, addressing work-life balance needs, and enhancing organizational culture. **BUT...***

Diversity, Inclusion & Your Organization

Survey Headlines...

- *A low percentage of respondents perceive D&I as a competitive advantage.*

Diversity, Inclusion & Your Organization

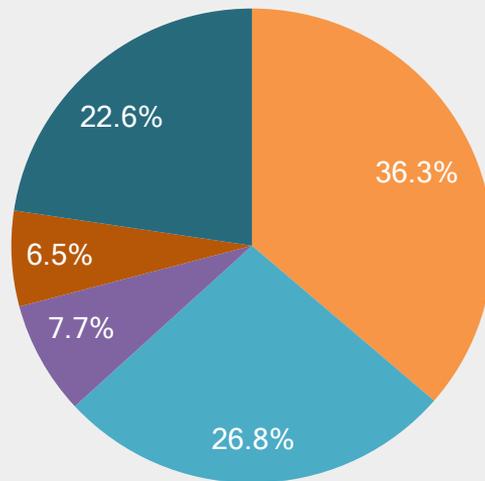
Survey Headlines...

Top Needs:

- *Resources*
- *Training*

Diversity, Inclusion & Associations North

The Board of Directors has approved the following diversity and inclusion goals.
Which ONE of the following would you rank as the top priority to address in the next 12 months?



Existing Goals Ranked...

1. Develop D&I resources
2. Incorporate D&I in education & publicity
3. Explore opportunities to be more inclusive and representative of community

Discussion

What are the ***three most important things*** about the present situation?

What do you ***want*** to be the same or different in the future?

What is **for sure** and what are your questions?

What contradictions do you see?

What do think will make a difference in the near future?

Guiding Principles

*Board, Committee & Staff Input –
April 2016*

- Lead
- Stay true to mission
- Be visionary
- Be inclusive
- Be open-minded
- Be brave enough to have honest conversation
- Be good stewards of members' \$\$

Where are we now?

What have you accomplished?

What have you learned?

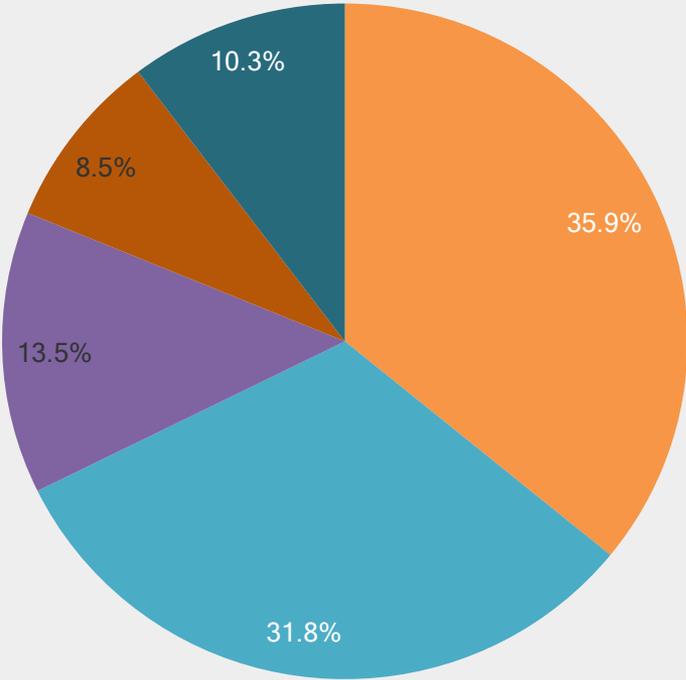
Where are you stuck?

Board & Committee Activities:

- Approved Goals
- Reach out to identity groups
- Demographics
- Member Survey
- Dues Structure Analysis
- Welcoming Promotions
- D&I Presentations
- Provide Tools
- Create Awareness
- Diverse Presenters
- Scholarship
- Mentorship
- Board Training
- Diversity Leadership
- Other Committees
- Diverse Thought
- Assess Ourselves

Diversity & Inclusion In principle and in practice, Associations North values and seeks diversity and inclusiveness within the association management industry. Associations North advocates for and promotes involvement, innovation, and expanded access to leadership opportunities that maximize engagement across underrepresented groups in Associations North membership. Associations North will provide leadership and commit time and resources to accomplish this objective while serving as a model to other associations.

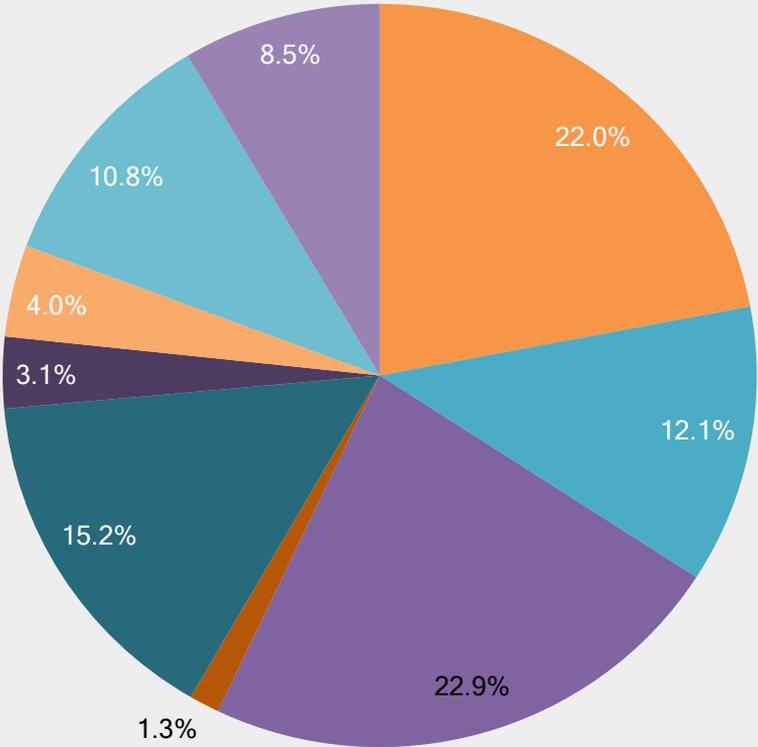
Which one of these best describes your organization?



- Professional Association
- Trade Association
- Association Management Company
- For-Profit
- Other (please specify)

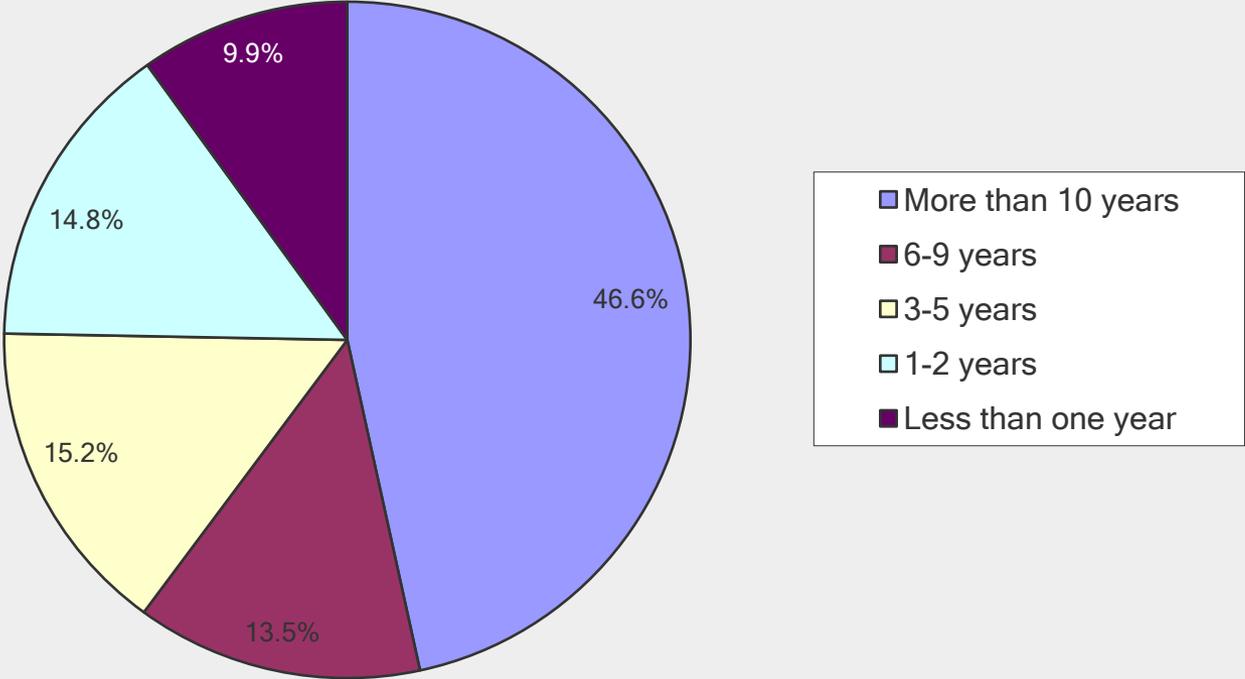


What is your title/role in your organization?

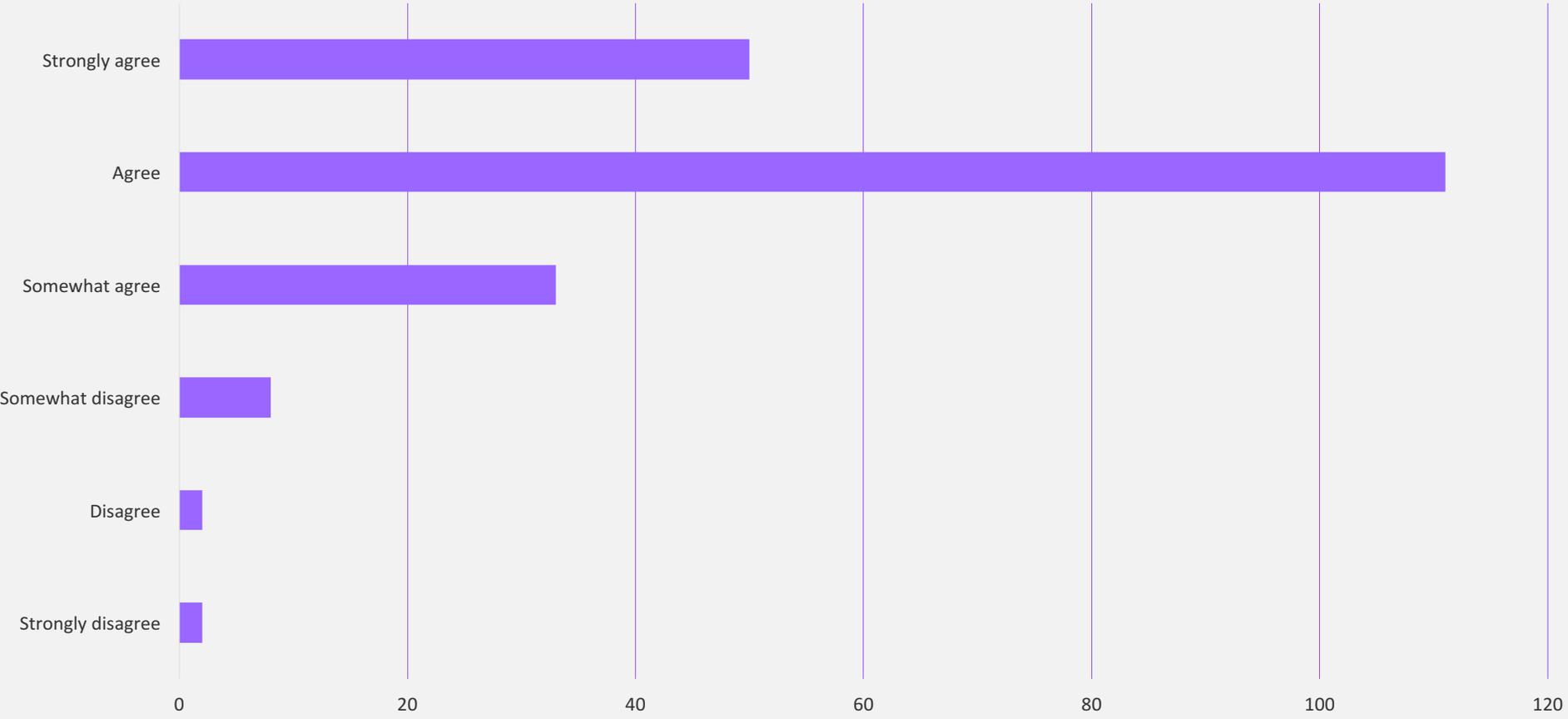


- Association President/CEO/Executive Director
- Association Senior Staff
- Association Professional Staff
- Association Management Company CEO
- Association Management Staff
- Convention & Visitors Bureau CEO
- Convention & Visitors Bureau Staff
- Supplier/Vendor/Consultant
- Other (please specify)

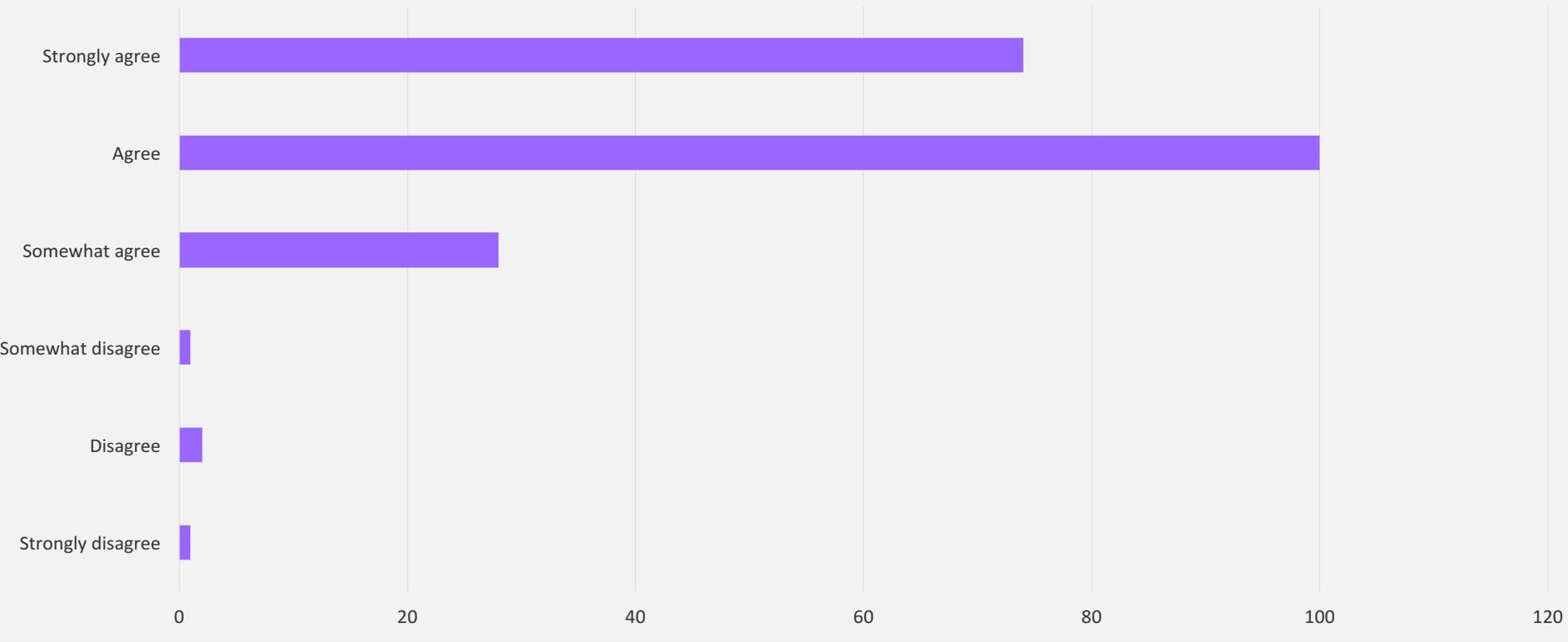
How long have you been affiliated with Associations North?



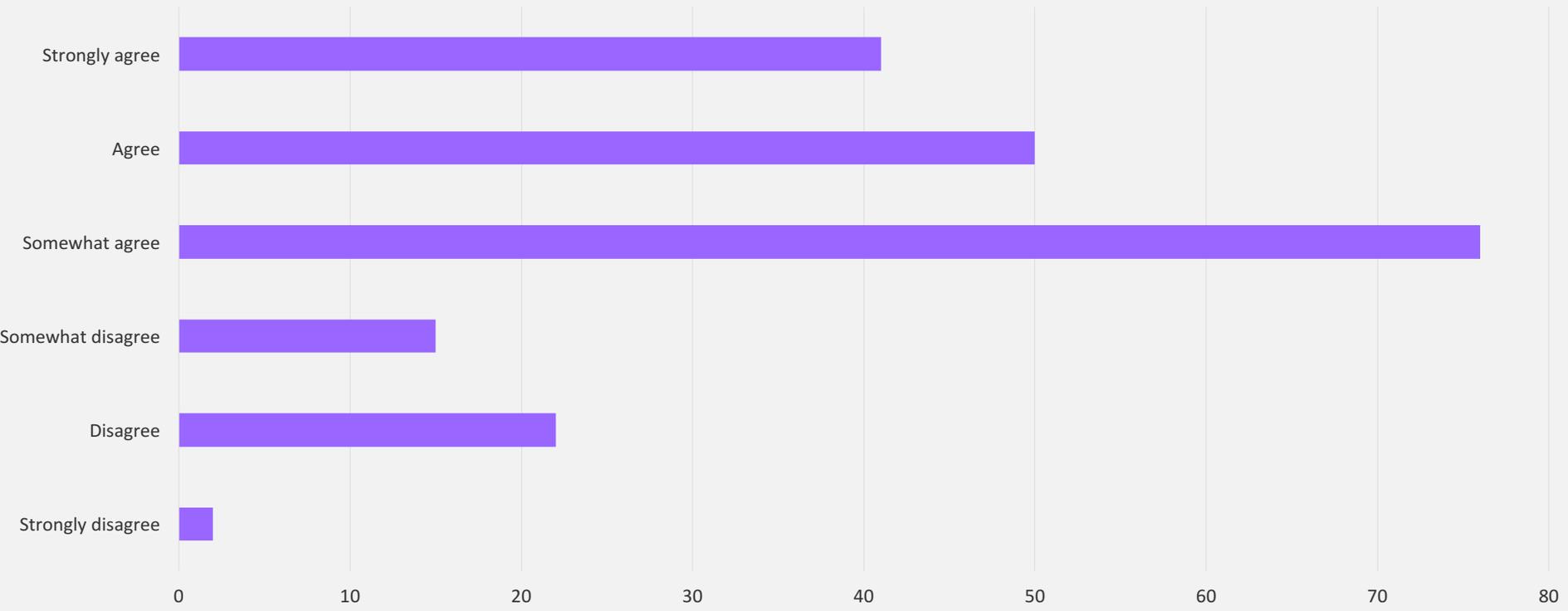
I understand the role of diversity and inclusion and how it impacts the effectiveness of my organization.



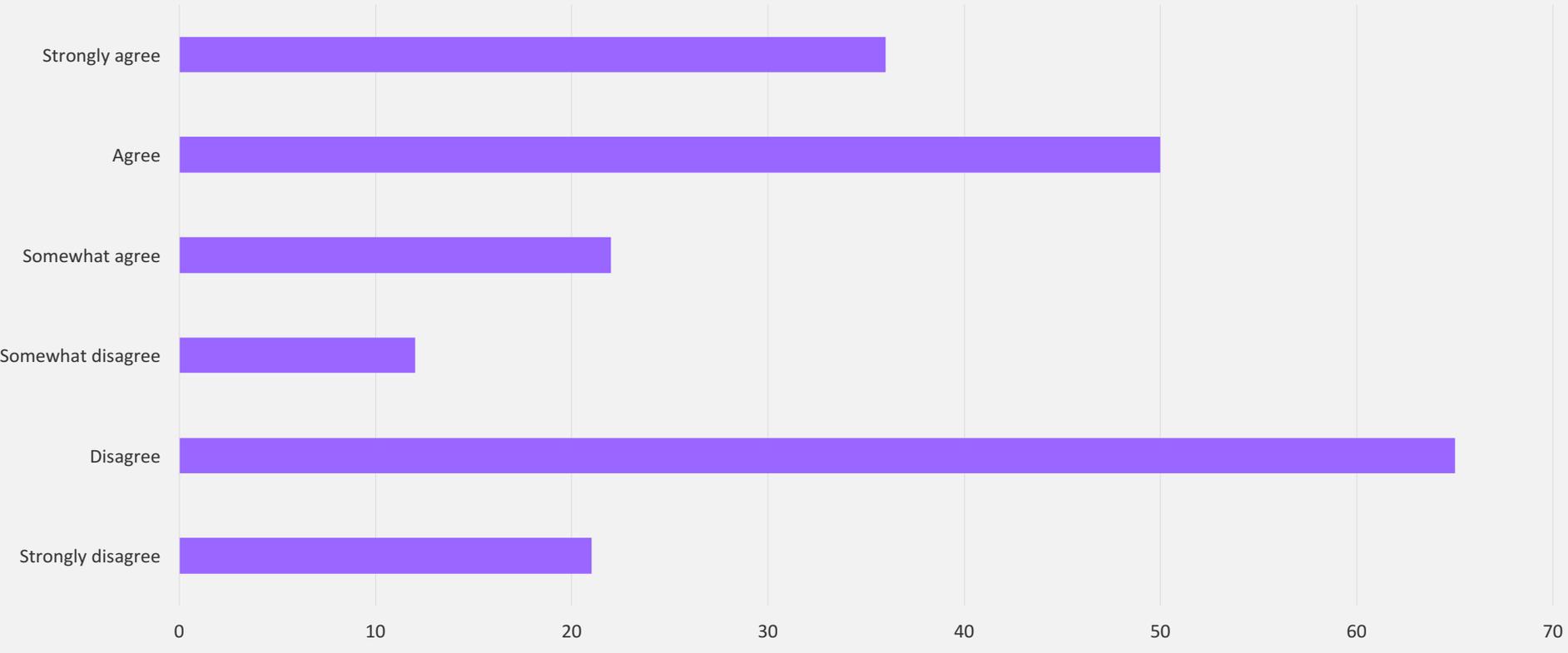
I am confident in my ability to work with people from different backgrounds, abilities and cultures from my own.



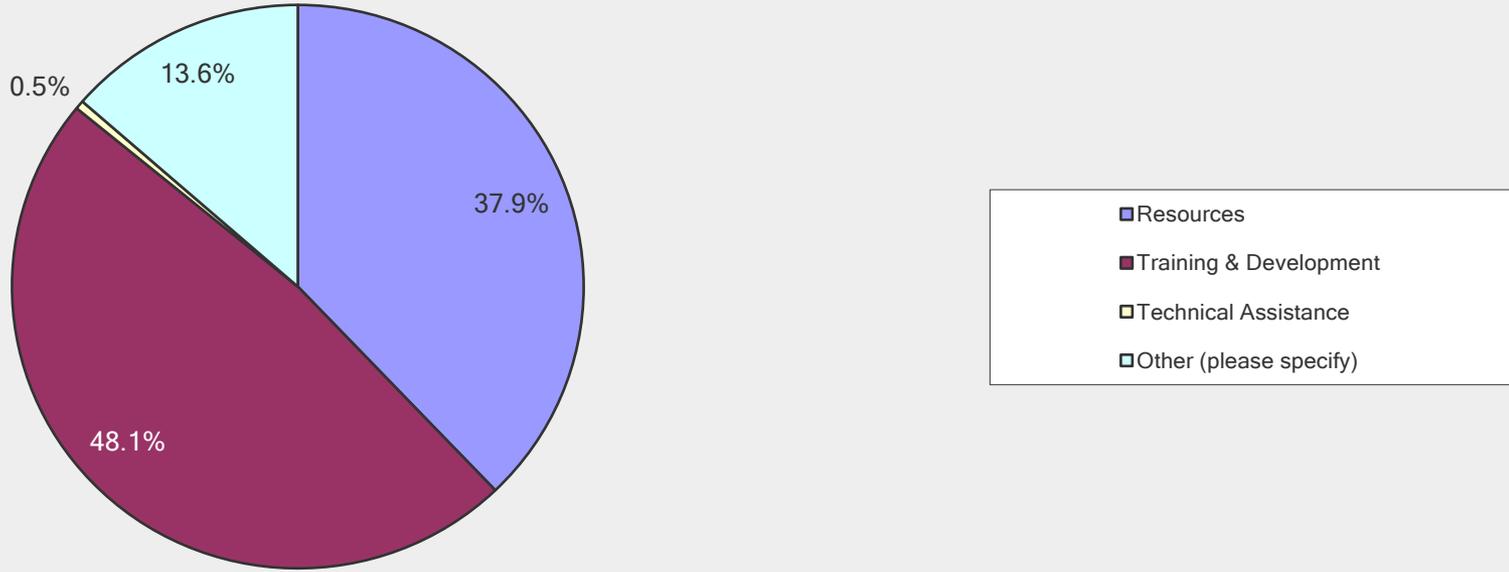
I am actively involved in efforts to create a diverse and inclusive environment for staff and members of my organization.



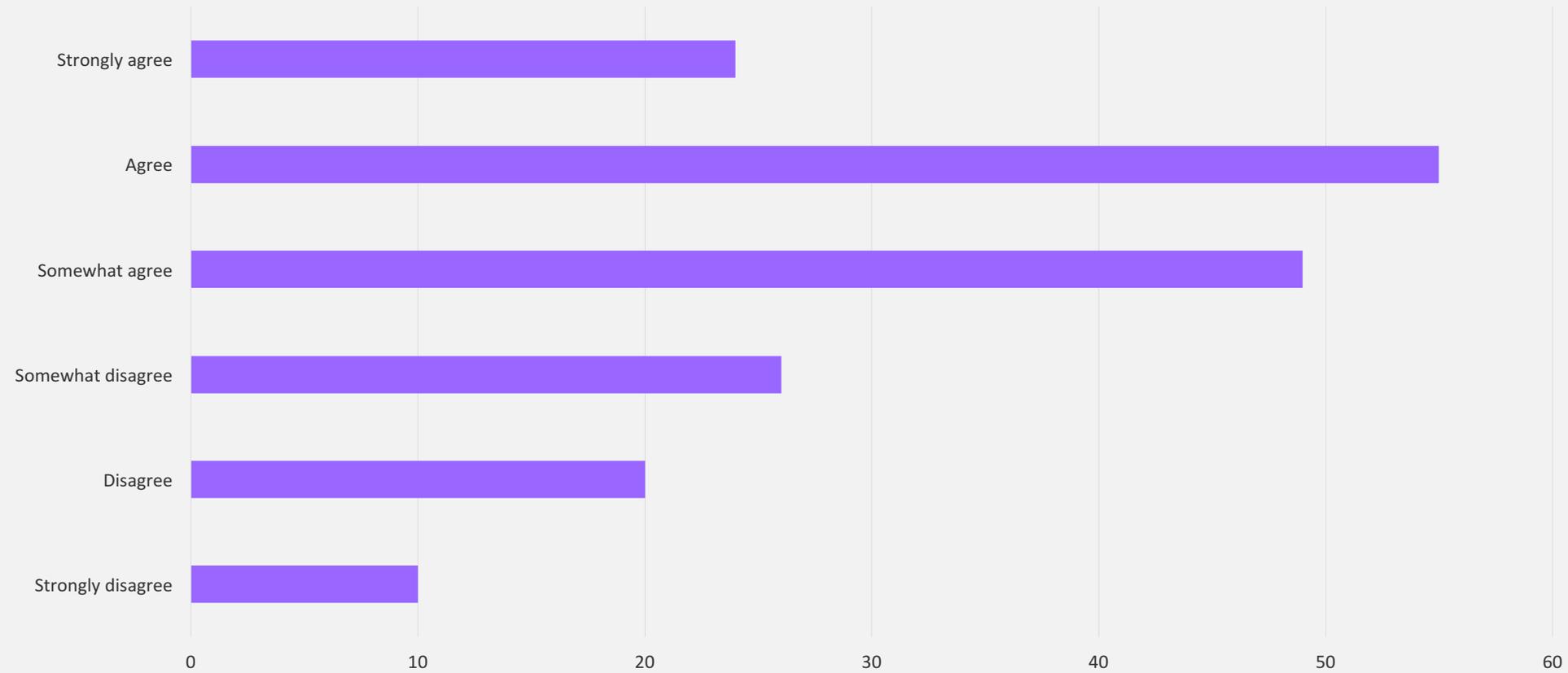
In the past year I have attended at least one training that enhanced my knowledge of diversity and inclusion or cultural groups.



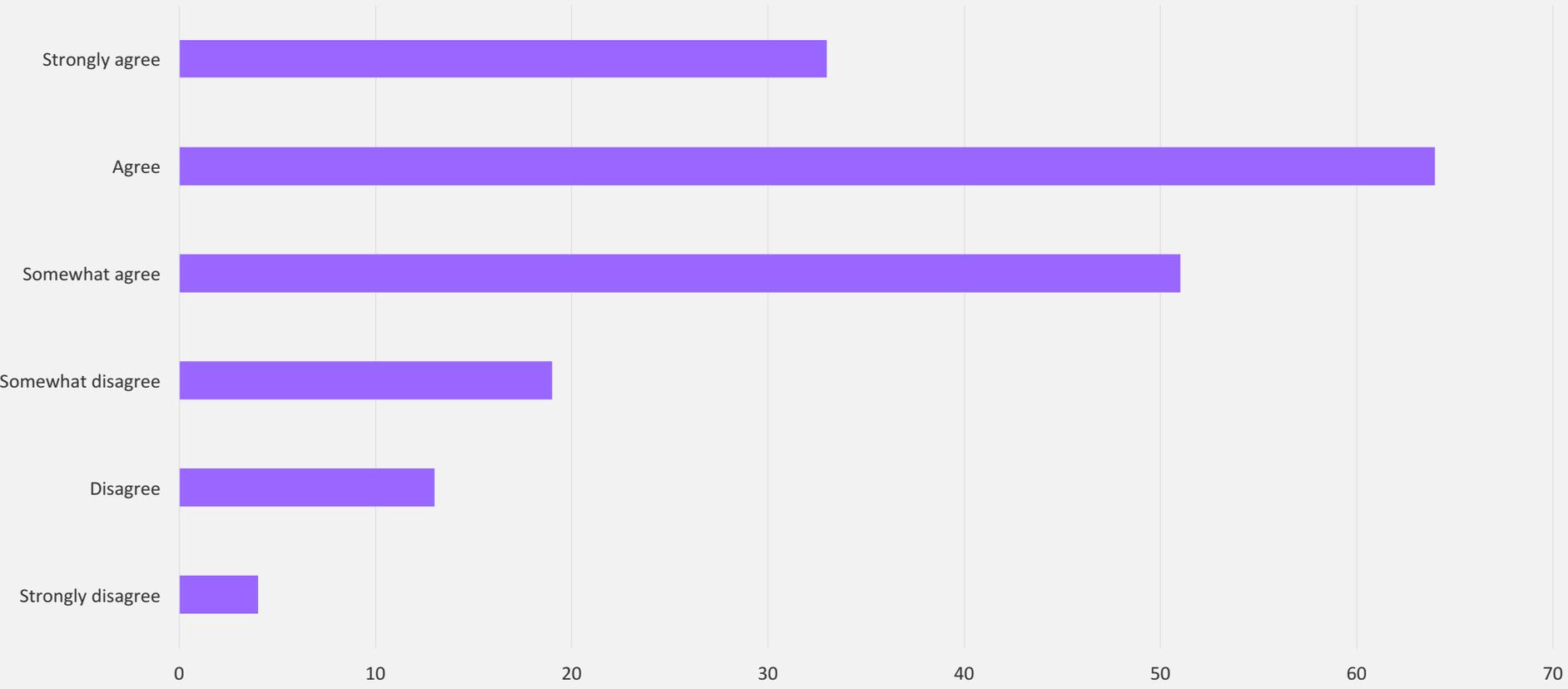
What is the most important thing that Associations North could offer to help increase your awareness, or build your knowledge and skills in the area of diversity and inclusion?



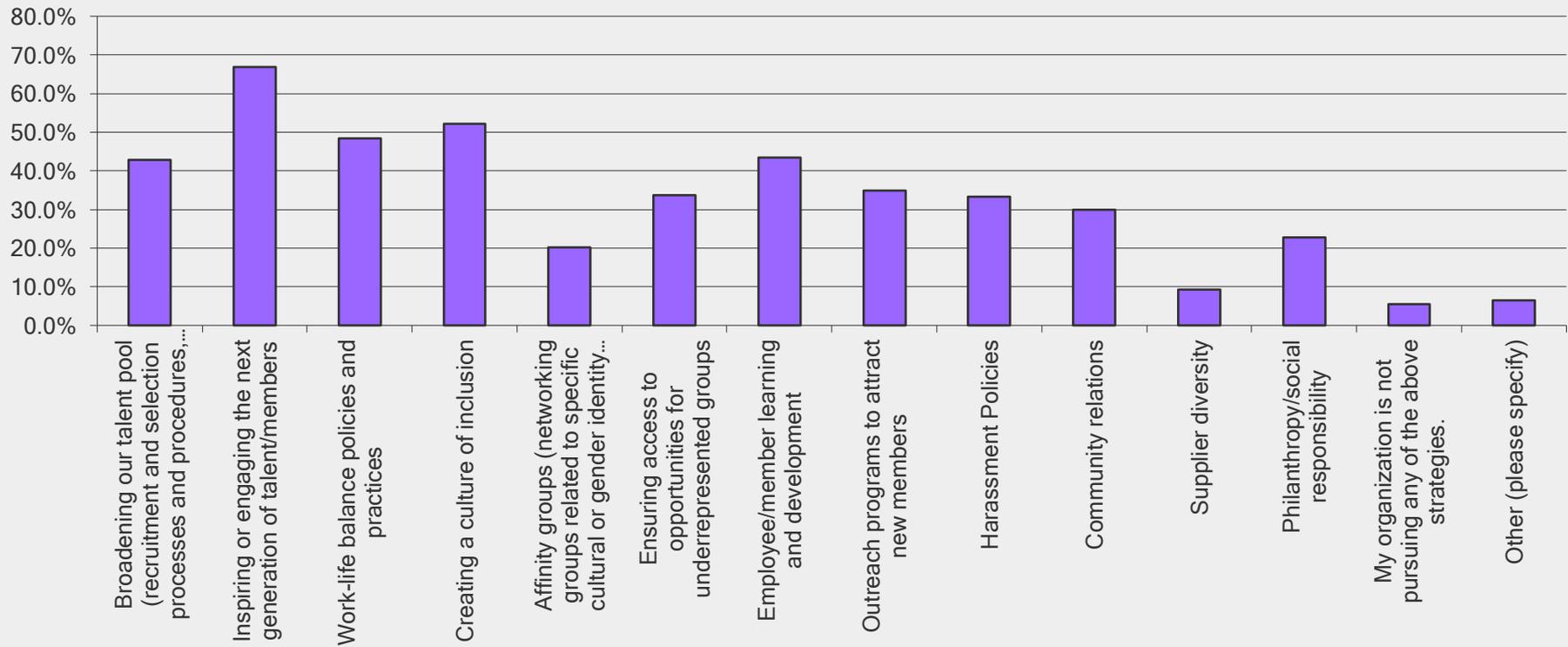
Diversity and inclusion are seen as a source of competitive advantage in my organization.



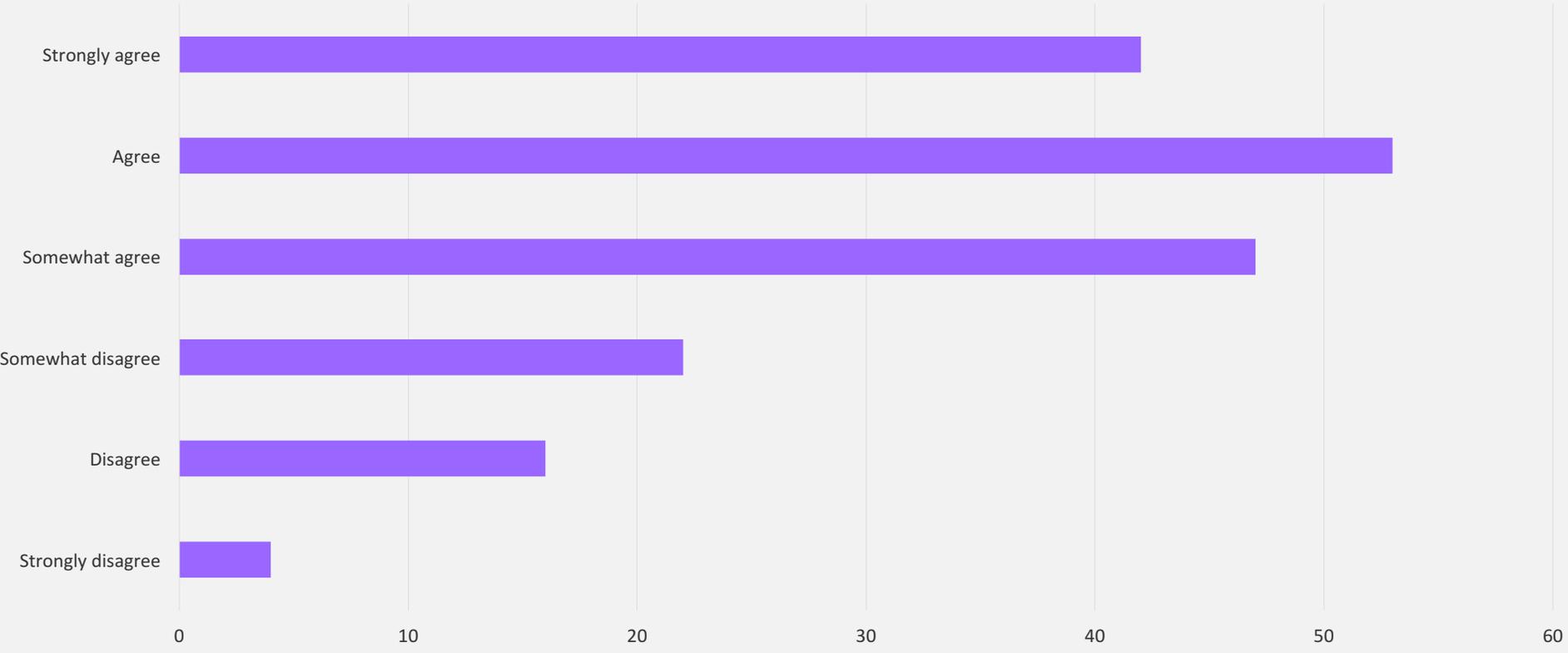
My organization is working toward the inclusion of all cultural and social perspectives in its operations.



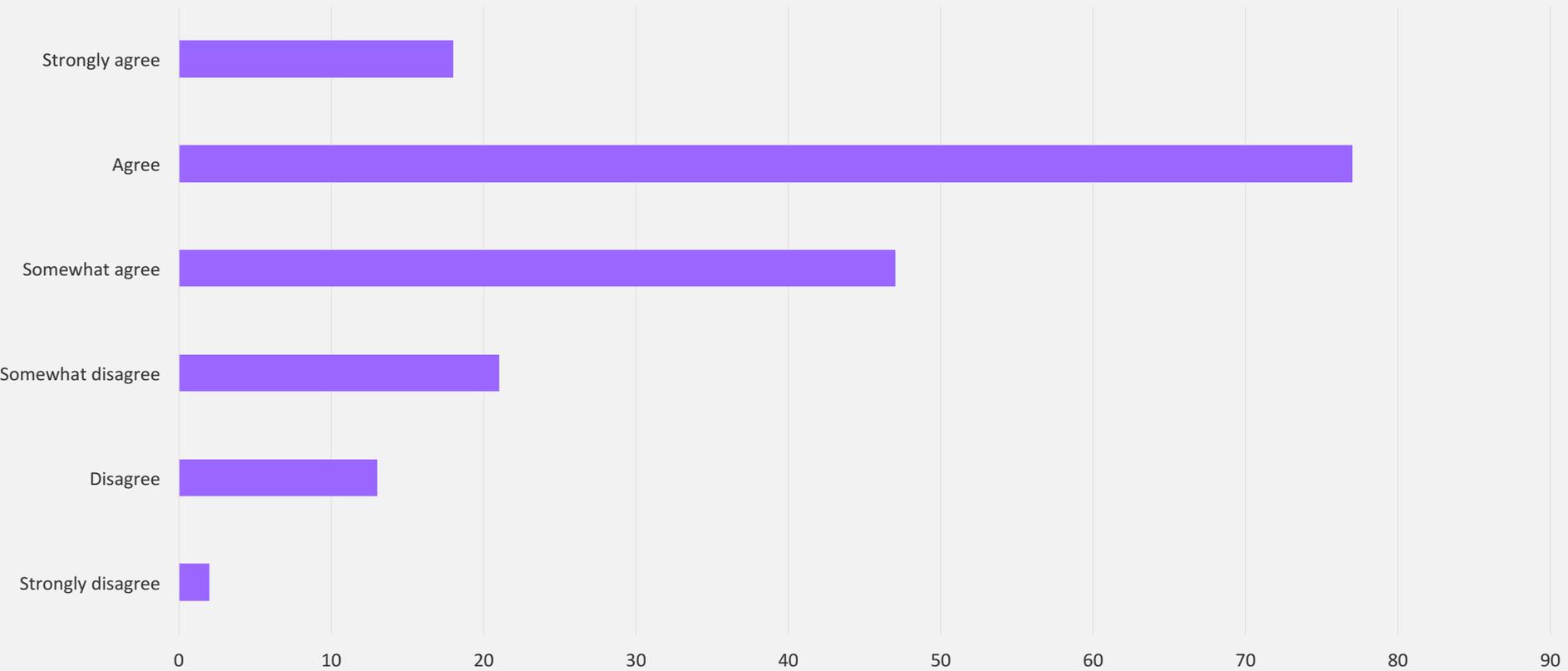
Which of the following diversity and inclusion strategies or practices is your organization currently pursuing? (Check all that apply.)



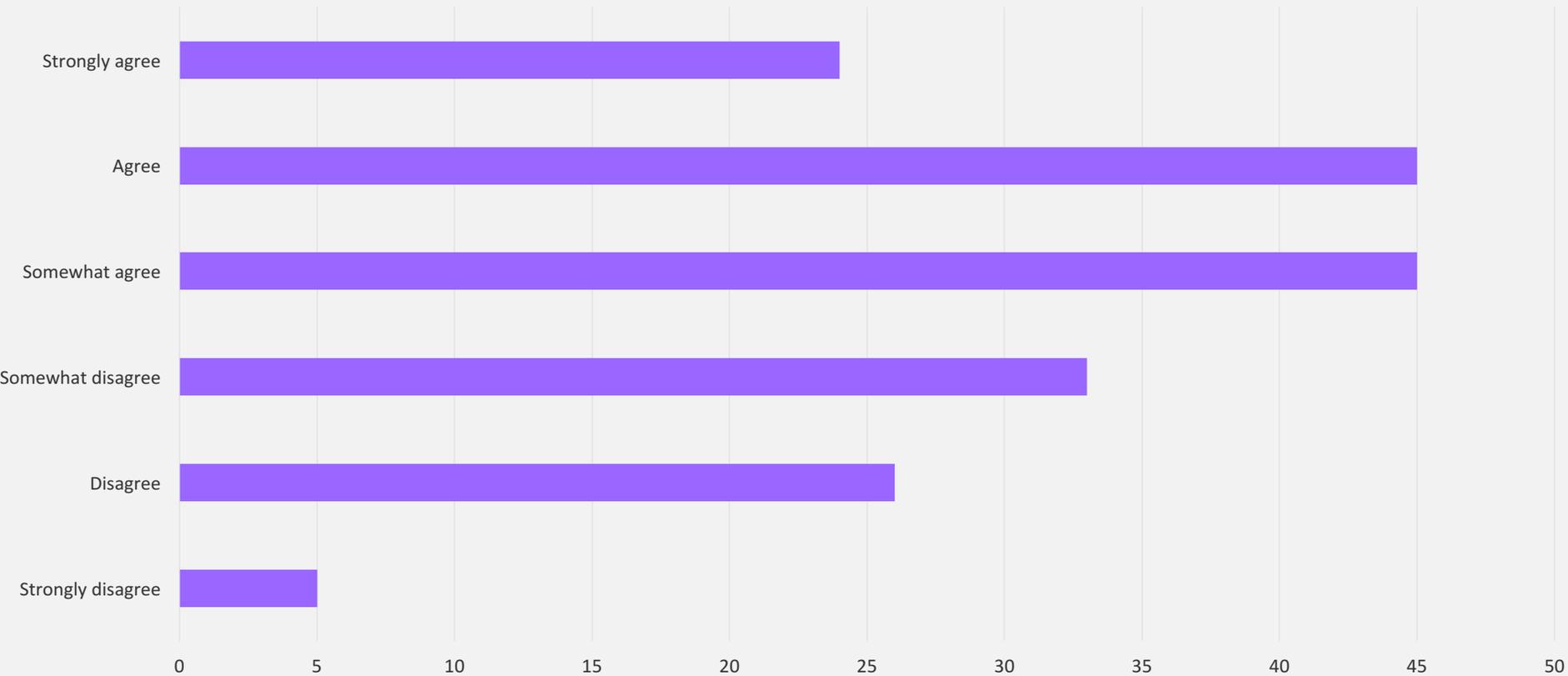
Leaders in my organization have made explicit statements that make it clear that they value working toward the full inclusion of cultural and social diversity.



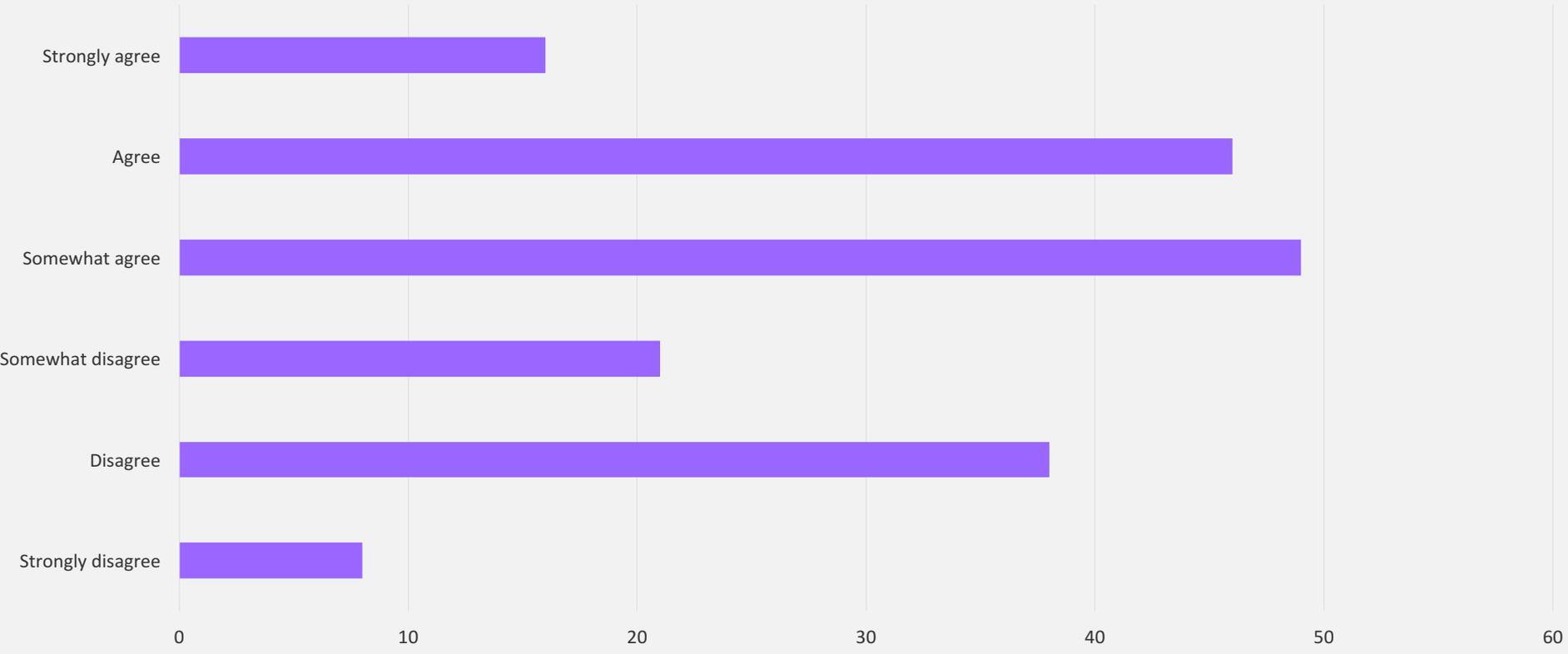
All employees and members in my organization feel fully included.



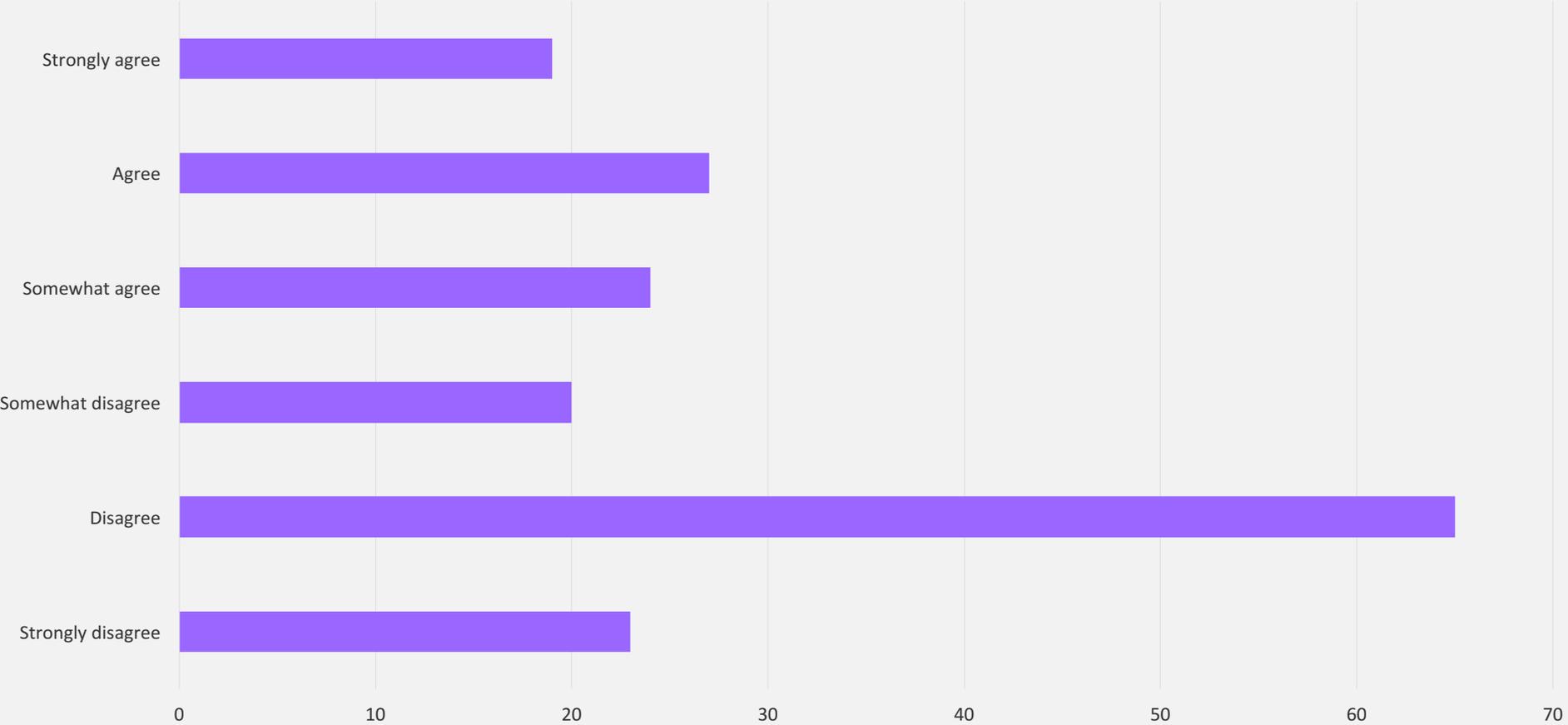
My organization has a mission and value statement that expresses a value for diversity and inclusion.



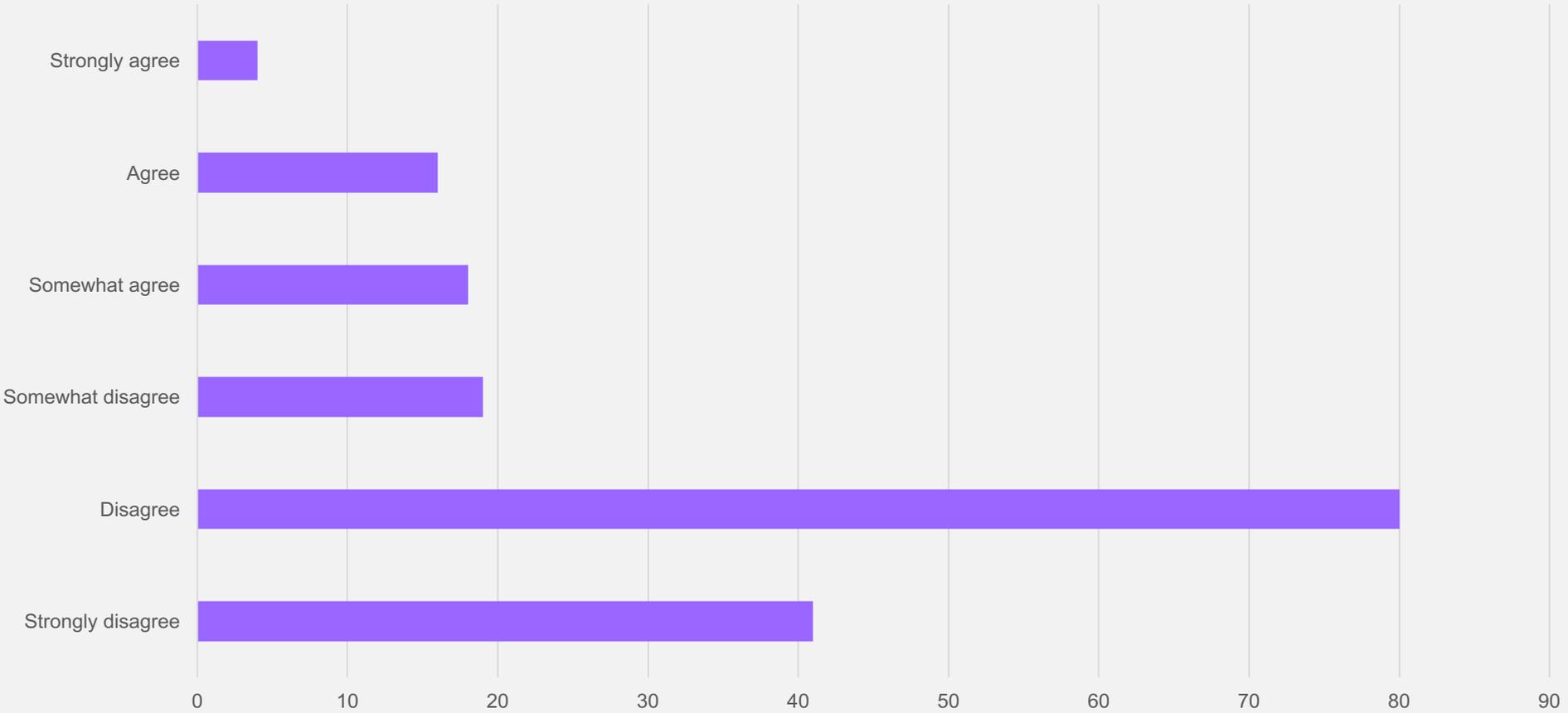
My organization provides training or professional development that addresses managing/engaging with people across differences and increasing inclusion.



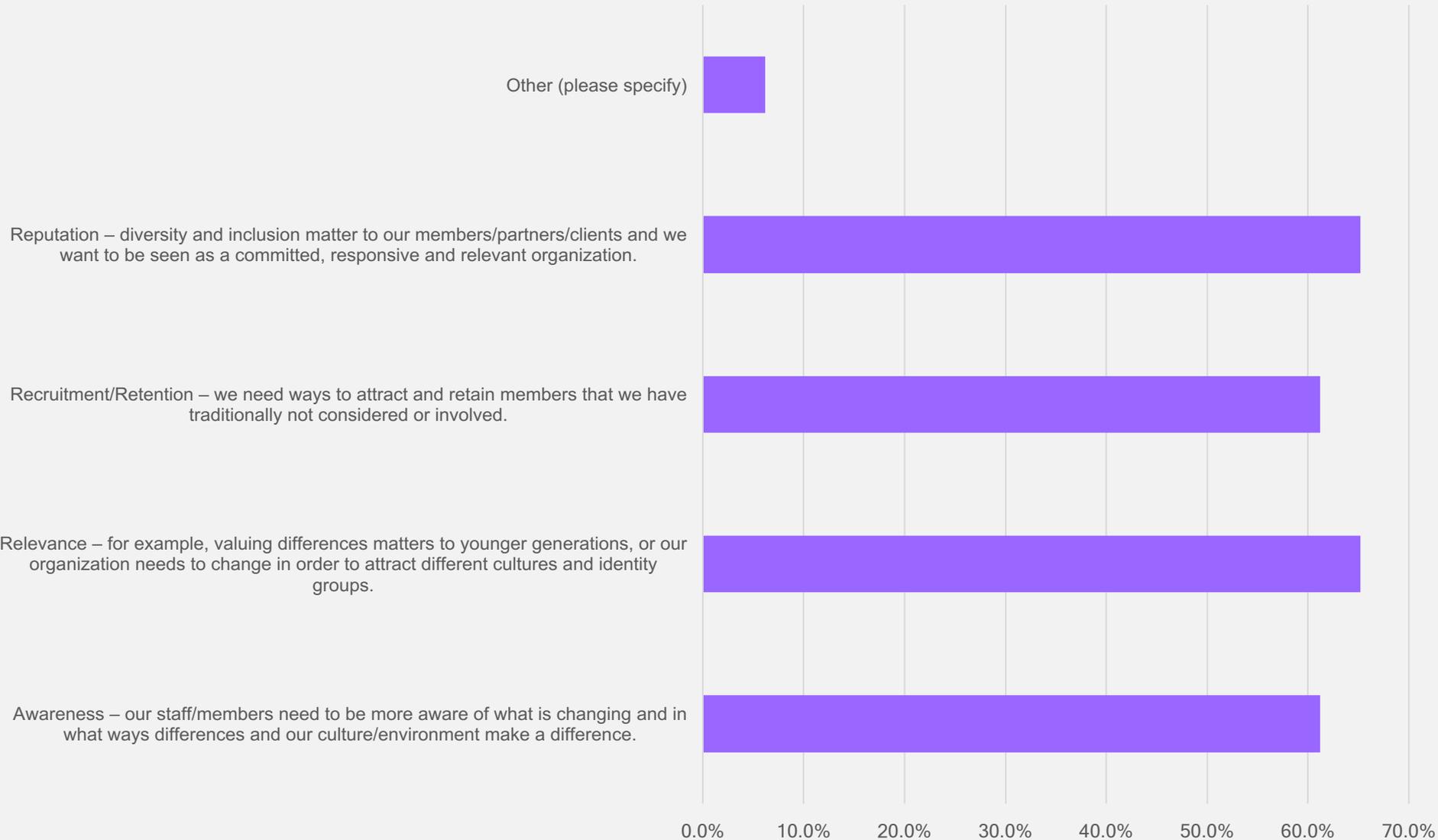
My organization has a staff person or volunteer who has responsibility for diversity & inclusion or outreach to diverse communities internal and/or external to the organization.



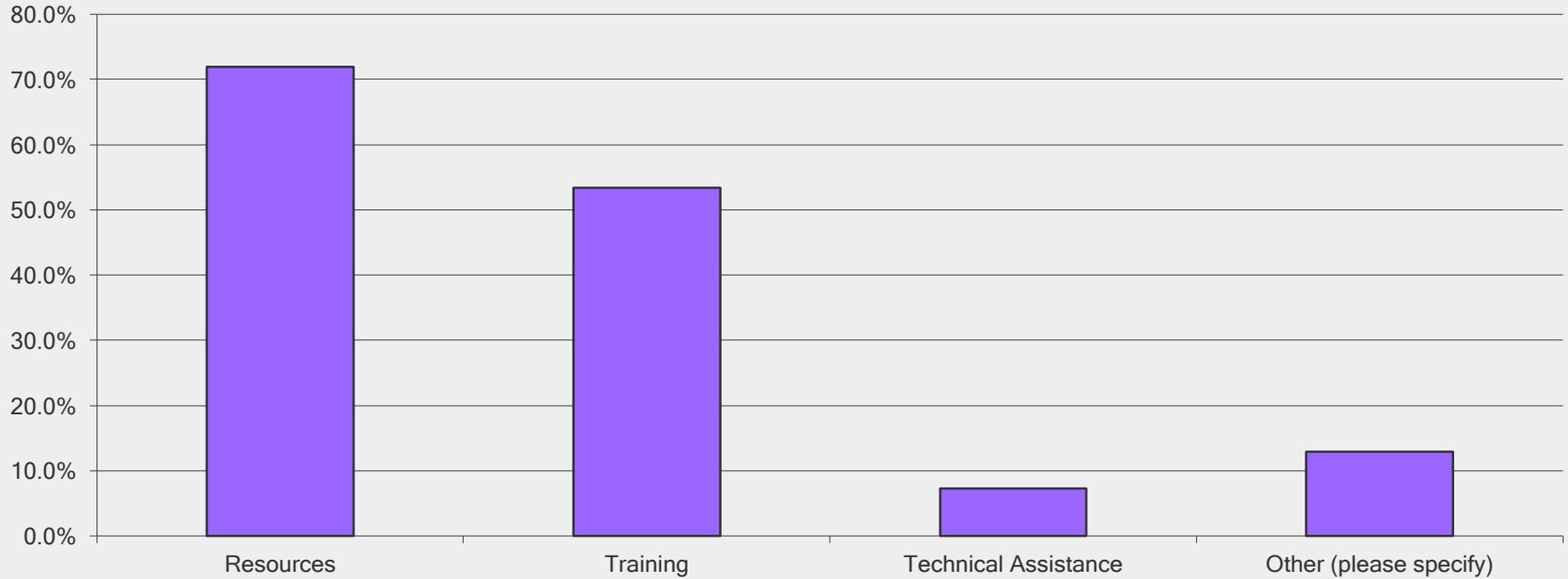
My organization asks members to self-identify their cultural/ racial/sexual orientation/background.



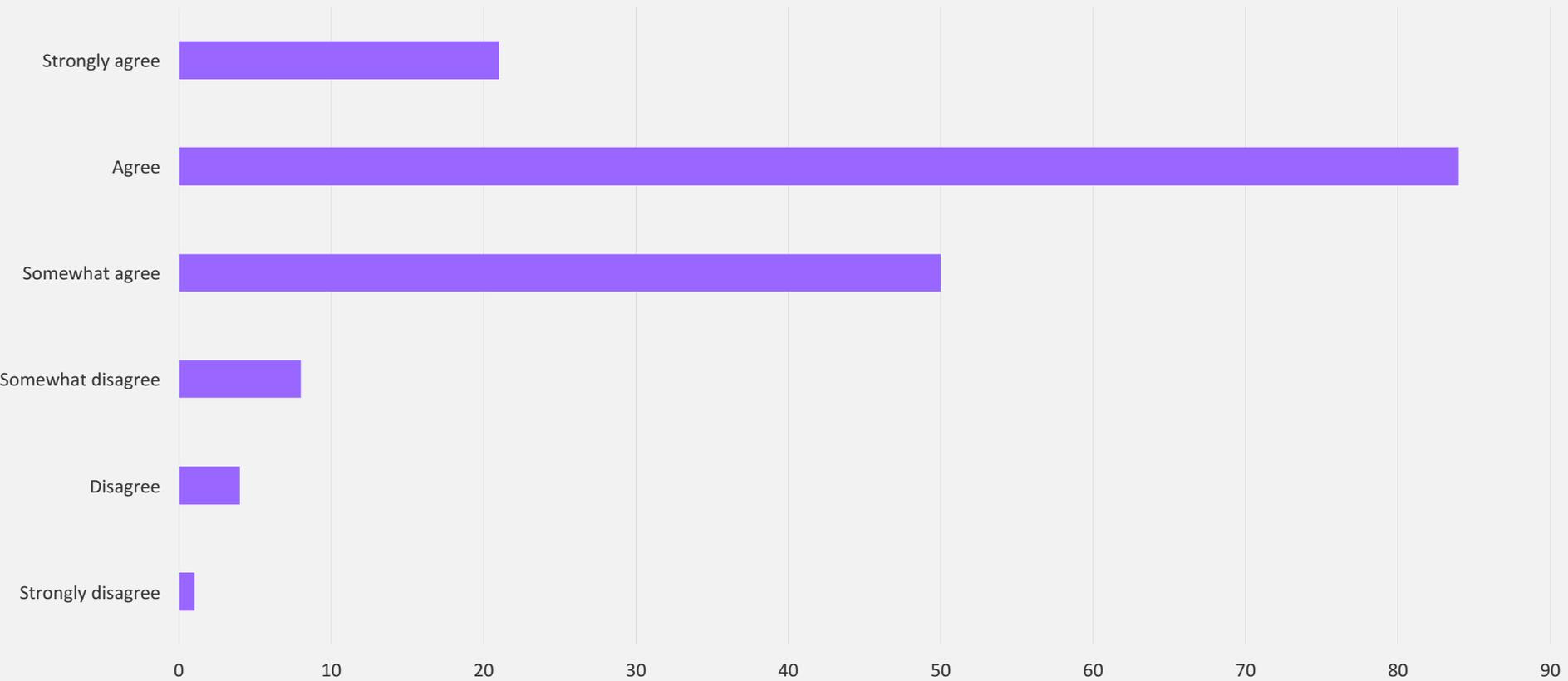
Which of the following are possible reasons why diversity and inclusion would matter to your organization? (Check all that apply.)



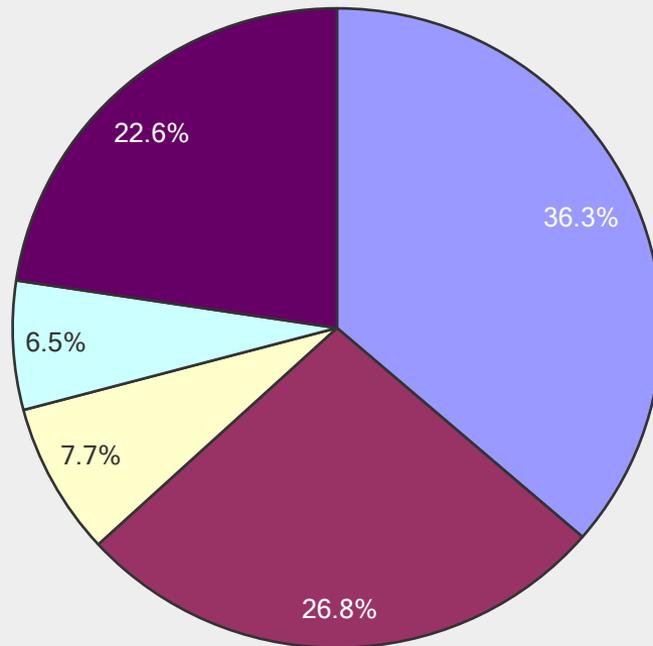
What could Associations North provide to help your organization implement diversity and inclusion policies, programs and/or practices? (Check all that apply.)



Associations North's Diversity and Inclusion Statement says: Associations North values and seeks diversity and inclusiveness within the association management industry. Associations North advocates for and promotes involvement, innovation and expanded acce



The Board of Directors has approved the following diversity and inclusion goals. Which ONE of the following would you rank as the top priority to address in the next 12 months?



- Develop Diversity and Inclusion Resources for Members
- Incorporate Diversity and Inclusion in education, publicity and education
- Incorporate Diversity and Inclusion into operations and policies
- Encourage members to voluntarily provide demographic information
- Explore opportunities to be more inclusive and representative of community