How to Use this Deck

Use this deck as a strategic resource and guide tailored for CEOs and C-Suite executives, and by extension, staff and Board members. It serves as a tool to guide leaders in navigating and responding to the complexities arising from divergent belief systems.

This deck is provided by ASAE in partnership with

McKinleyAdvisors.

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What is the Association Insights Center?

A community of experts collaborating to face the increasingly complex environment and challenges ahead. In partnership with McKinleyAdvisors, the AIC provides critical, on-demand intelligence and tools to support association CEOs as they face the tough decisions yet to come.

The slides that follow provide a synthesis of the community's work in 2023 to support CEOs in supporting intellectual freedom and managing divergent belief systems.

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Table of Contents

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Framework for Managing Divergent Belief Systems

What are Divergent Belief Systems?

Divergent belief systems represent fundamental differences in the way individuals view, understand and perceive important issues.

These differences in beliefs <u>go beyond</u> simple and constructive differences of opinion in that they are highly emotionally charged, tend to be inflexible (i.e., individuals are unlikely to change their position), and they are oftentimes connected to a political or social identity. They may also be rooted in different interpretations of fact.

Why is this different?

CEOs face a multitude of everyday challenges that they must address. The challenges associated with divergent belief systems are different. They are often characterized by:

High stakes

- High risk, strong implications and consequences of action may be severe; unique, likely without any precedent

High complexity

- Problem can be approached from multiple and competing perspectives, with multiple potential solutions – few or none of which are complete solutions; no single root cause

High degree of uncertainty

- Details and facts are unclear, or limited, and few reliable neutral sources or authorities exist

High emotions

- Parties feel highly invested in the outcome and may tie it to their individual identity

High disagreement

- Parties may not even agree on the problem, or on the facts involved in the issue

High liability

- Problem solvers are held liable for the consequences of their actions due to the breadth of potential impact

High perception of threat

- Parties may perceive that their health, safety or welfare is threatened by the issue

The CEO Role in Managing Divergent Belief Systems

Association CEOs, by definition, must be strong listeners, facilitators and protectors of their organization. They use these skills daily.

However, listening, facilitating and protecting require a more thoughtful, intentional and nuanced approach when dealing with divergent belief systems. **These challenges demand comprehensive assessment from all angles and require clear and intentional action.**

Research on this topic outlined a process for addressing challenges resulting from divergent belief systems, and insights collected from survey participants as well as AIC Thought Leadership Panel members highlighted examples of nuance. Secondary research illuminates strategies from the corporate sector to round out a thoughtful approach to facing these "wicked problems."

Above all, we know that a variety of potential catastrophic long-term trends sit on the horizon – climate change, civil unrest, globalization and growing inequality. Association CEOs, Boards and staff members want to do the "right thing" but it's becoming more challenging to know exactly what that is. In the corporate sector, successful companies have adopted a "blueprint for engaging with society in a positive way." **Associations, comprised of members working toward a common purpose, are better positioned to do that than any other business.**

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Listen — Taking care to listen deeply and ensure stakeholders feel heard

Facilitate — Creating a consistent and structured approach

Assess — Evaluating the data in the context of mission, vision and values as well as those who are impacted

Protect — Caring for the safety of the association and its members
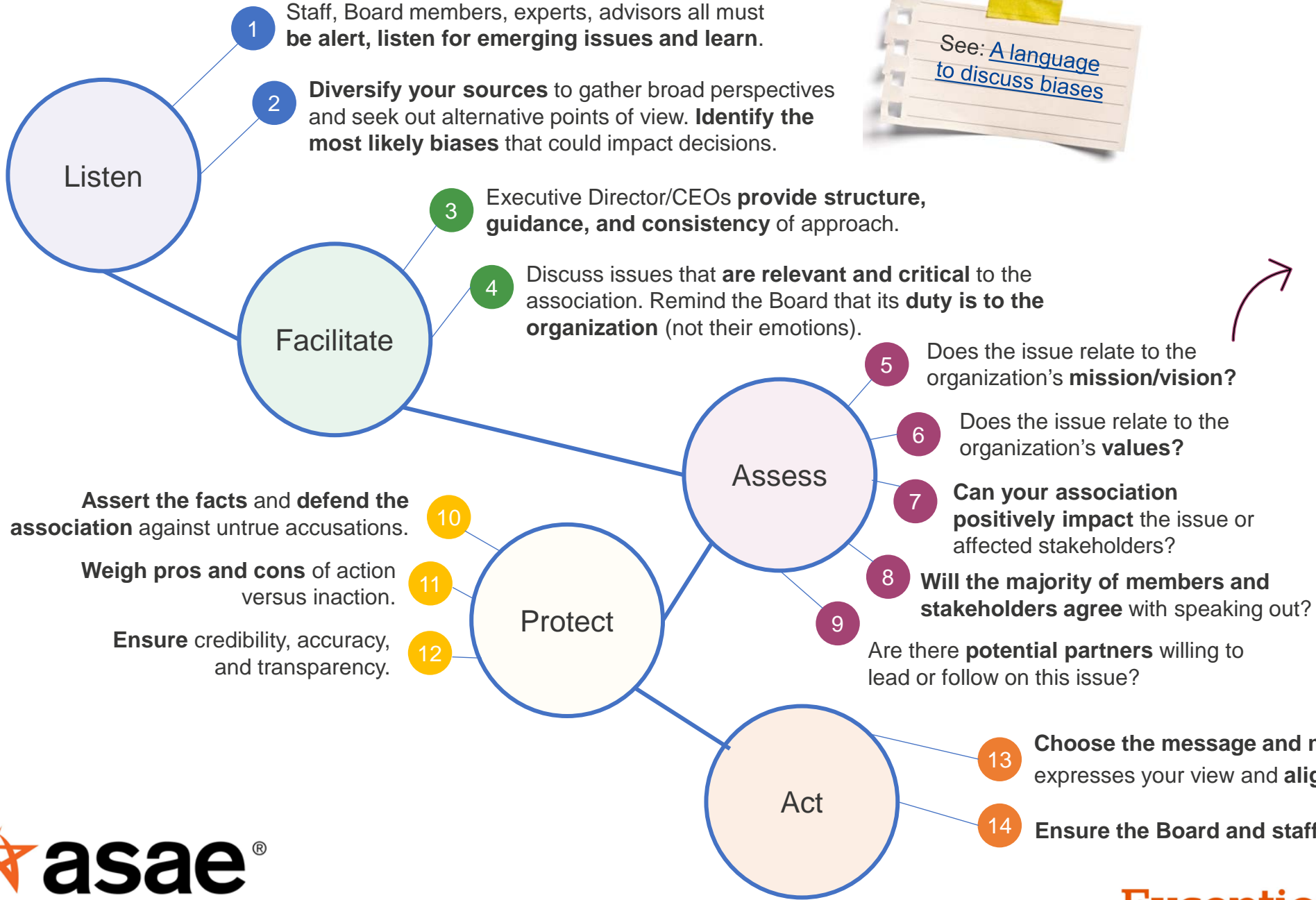
Act — Steering through uncertainty with clear intention and communication
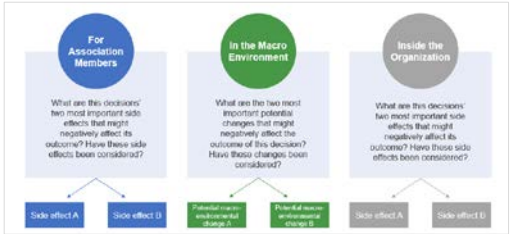
Framework for Managing Divergent Belief Systems

Use this guide as a tool to reflect on your processes, refresh your approach and prepare your Board and staff for the next critical challenge.

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Listen

1. Staff, Board members, experts, advisors all must **be alert, listen for emerging issues and learn**.

2. **Diversify your sources** to gather broad perspectives and seek out alternative points of view. **Identify the most likely biases** that could impact decisions.

See: A language to discuss biases

Facilitate

3. Executive Director/CEOs **provide structure, guidance, and consistency** of approach.

4. Discuss issues that **are relevant and critical** to the association. Remind the Board that its **duty is to the organization** (not their emotions).

Assess

5. Does the issue relate to the organization's **mission/vision?**

6. Does the issue relate to the organization's **values?**

7. **Can your association positively impact** the issue or affected stakeholders?

8. **Will the majority of members and stakeholders agree** with speaking out?

9. Are there **potential partners** willing to lead or follow on this issue?

Protect

10. **Assert the facts** and **defend the association** against untrue accusations.

11. **Weigh pros and cons** of action versus inaction.

12. **Ensure** credibility, accuracy, and transparency.

Act

13. **Choose the message and messenger** that most clearly expresses your view and **aligns with communication strategy**.

14. **Ensure the Board and staff are aligned** on the message.

Are you ready to decide?

When to Speak Out

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CEO Role: Listen

Listen

Make sure all are heard but do not rush or feel compelled to action. Advance relevant conversations.

- Gather broad perspectives and hear all sides. Identify and avoid biases that could impact decisions.

- Give everyone a voice and don't fear debate. Remind stakeholders that this is the purpose of an association.

- Don't rush things; don't react immediately.

- Gather accurate information from members, staff and experts for the Board.

- Use information to pre-identify compelling issues and support rapid decision-making on when to take a stance.

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The Art of Listening: Simon Sinek

Listening Checklist

Lessons learned from association CEOs

- Stay present, listen deeply
- Connect with and consider what is being asked of impacted groups
- Acknowledge and validate emotion
- Invite staff input
- Stay humble

CEO Role: Facilitate

Facilitate

Use a consistent, transparent, orderly and defensible process to hear all sides on relevant issues.

- Be the objective, dispassionate facilitator that provides a structure to hear from all sides in the form of respectful, solutions-oriented conversation.

- Discuss only issues that are relevant and critical to the association.

- Ensure a consistent approach, report outcomes.

- Work with the Board to determine the "language that will be used."

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Guidelines for Fostering Productive Conversations

Commit to active listening

Listen for understanding, not to prepare your response or rebuttal.

1

Embrace diversity of perspectives

And actively seek understanding. Difference maximizes success.

2

3

Don't be afraid of vulnerability

Sharing your feelings can lead others to be more understanding and opens doors to more opportunities.

4

5

Cocreate solutions

The CEO's primary role is to foster unbiased discussions and ensure alignment with the association's core values. You don't have to carry the burden of having all the right answers.

Place equal measures on demonstrating respect, building trust and engaging with candor

Embodying these attributes will enable deep, challenging and robust debates.

Discussion Questions to Foster Open, Constructive Dialog and to Ensure Alignment with the Association's Core Values

Does the issue relate to our purpose and/or strategy?	How does the matter impact our members and stakeholders?	How does the matter impact our field/profession?	What are our choices for this engagement?
What is the price of our silence?	How does the issue relate to our values?	Can we meaningfully influence the issue?	Will our members agree with speaking out?

Susman, S. (2023). Deciding whether to respond to breaking news (or not). Harvard Business Review. https://hbr.org/2023/04/when-should-your-company-weigh-in-on-hot-button-issues

Argenti, Paul A. (2020). When Should Your Company Speak Up About a Social Issue? Harvard Business Review. https://hbr.org/2020/10/when-should-your-company-speak-up-about-a-social-issue

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Reflection Questions for CEO, Senior Leadership and the Board

Will taking a stance on this issue authentically reflect our organization's values?	How might our stakeholders, both internal and external to the association and its field, be affected by our response (or lack thereof) to this issue?	What do our members expect or prefer in our response?	Are we prepared for potential internal challenges or resistance that may arise from our involvement?
Are we willing to commit to this cause beyond just a statement or initial action?	What long-term changes could/ should we implement to support this issue?	How does our response align with legal requirements and ethical standards?	Are we open to feedback and willing to adapt our approach based on outcomes?

Questions sourced and adapted from ChatGPT.

Orderly Process

Ensure consistency and transparency on the process to ensure fairness and the trust of stakeholders.

- Be transparent: have a pre-determined process and explain it (e.g., "*we're going to hold these opportunities to discuss*" "*the BOD will make the decision*").

- Scan the macro-environment to pre-identify issues that will accelerate action, similar to other forms of crisis planning.

- Clarify the Board's position on when the association will become involved or take a position.

- Educate stakeholders on the association's position and the rationale for it.

- Ensure actions align to the association's position (e.g., keep a firm hold on materials/statements that are issued).

- Practice the process with your Board and staff to build capacity in decision making, ensure consistency in approach and continue to evolve process.

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The Role of Policies and Process

1.
Establish the Process

2.
Be an Early Warning System

3.
Facilitate the Conversation

4.
Make the Decision and Provide Transparency

Under what circumstances will the association take which actions?

What rubric will the association use to understand the issue (i.e., is this issue directly connected to the mission?)

Provide briefs to the Board complete with a summary of the issue, pros/cons and the perspective of members, staff, experts, etc.

Establish the process that you will use to have discussions and gather information.

How will you ensure fairness and a safe space, while also making sure conversations are factual?

How much conversation will you have and who will you hear from?

How will you package the output of your conversations to the Board and remind them of their duties?

How will you communicate decisions back to stakeholders?

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Facilitating Checklist

Lessons learned from association CEOs

- Explain the process

- Create psychological safety

- Check assumptions and biases

- Stay curious

CEO Role: Assess

Assess the Rationale

Be the voice that reflects and reframes the issues back to the mission, vision, values and strategy of the organization.

- Ensure that the mission of the association is at the core of the conversation while balancing differing opinions.

- Remind the Board how the conversation connects to the mission, vision, values and strategy of the association.

- Remind the Board that its duty is to the organization (not their emotions).

- Keep the discussion relevant to the association.

Are You Ready to Decide?

For Association Members

What are this decisions' two most important side effects that might negatively affect its outcome? Have these side effects been considered?

Side effect A

Side effect B

In the Macro Environment

What are the two most important potential changes that might negatively affect the outcome of this decision? Have these changes been considered?

Potential macro-environmental change A

Potential macro-environmental change B

Inside the Organization

What are this decisions' two most important side effects that might negatively affect its outcome? Have these side effects been considered?

Side effect A

Side effect B

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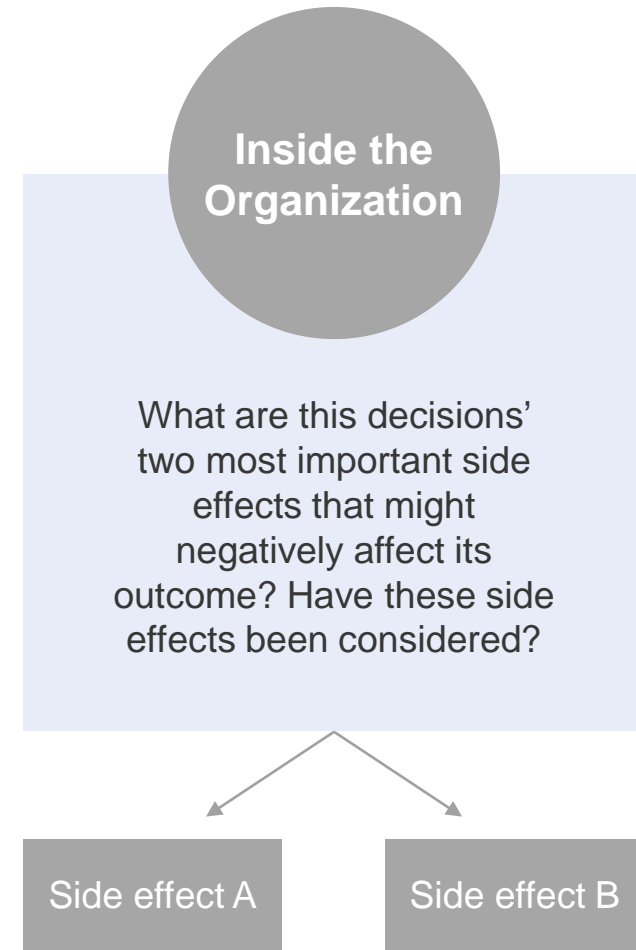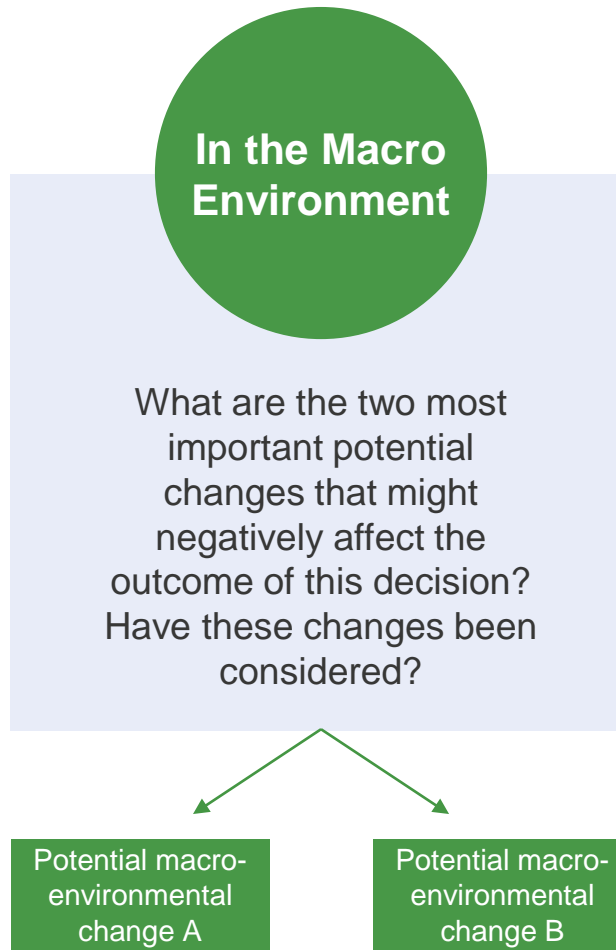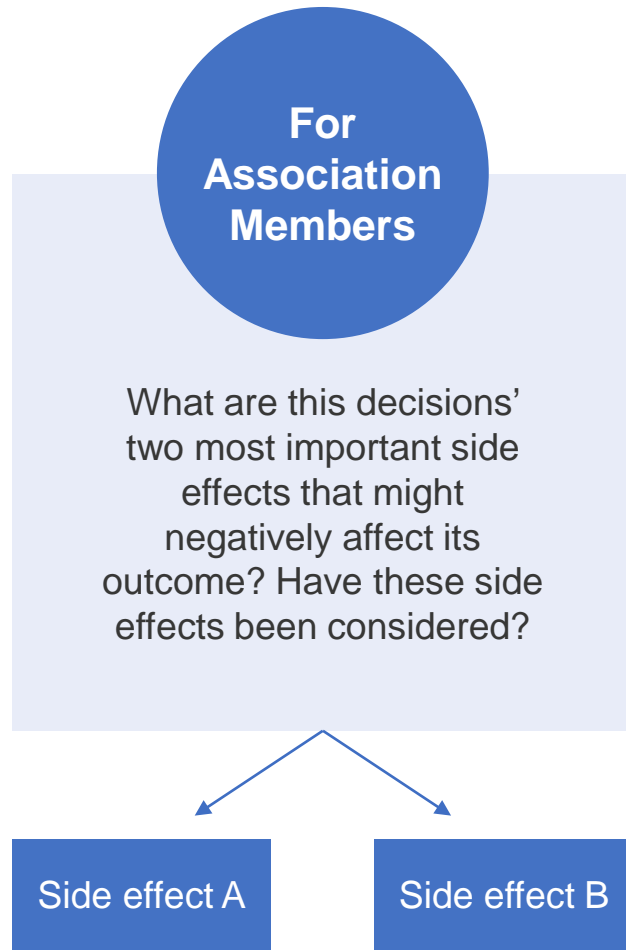
When to Speak Out

Does this issue relate to your mission/vision?	Does this issue relate to your organizational values?	Can your association positively impact the issue or affected stakeholders?	Will the majority of your stakeholders agree with speaking out?	Are there potential partners willing to lead or follow on this issue?	Number of yeses and position to take
YES	YES	YES	YES	YES	**5 Yeses:** Speak out as a leader about the issue.
NO	YES	YES	YES	YES	
Action: Consider evolving your mission/vision—you may be overlooking an opportunity.					
YES	NO	YES	YES	YES	**4 or more yeses:** Maybe speak out as a follower.
Action: Focus on mission/vision impact and positive impact(s) on the issue and/or affected stakeholders.					
YES	YES	NO	YES	YES	
Action: Craft a message that emphasizes how the issue relates to your mission/vision and values.					
YES	YES	YES	NO	YES	
Action: Conduct research to understand risk; engage with stakeholders to better understand perspectives. Evaluate potential for harm by inaction.					
YES	NO	NO	NO	NO	**1 yes:** Do not speak out for now but continue to monitor
NO	NO	YES	NO	NO	
NO	YES	NO	NO	NO	
NO	NO	NO	NO	NO	**0 yeses:** Do not speak out.

Assessing Checklist

Lessons learned from association CEOs

- Engage trusted peers to reflect on all angles of the issue

- Reflect on the history of the association to identify founding values and principles that could influence your approach

- Consider how potential decisions recognize and reflect the humanity and individuality of all stakeholders

CEO Role: Protect

Protect the Organization

Navigate the necessity of the conversation, determine the need to take action or not, and provide the information needed for the Board to take action – always with the organization's best interests, mission and strategy in mind.

- Defend the association against untrue accusations.
- Be an invisible influencer that reframes the conversation to the associations mission and values.
- Do not act and do not adopt formal positions unless it is an issue critical to the association and in line with association's best interests and strategy.
- Balance business considerations with emotional considerations. Weigh pros and cons of action/inaction.
- Bring information to the Board, including outside facilitator and expert advice and assistance of legal counsel, as necessary.

Protecting Checklist

Lessons learned from association CEOs

- Create a routine of engaging the Board and members in conversation about challenging issues to stay informed about perspectives and accelerate the association's ability to respond

- Prepare a blueprint for engaging on challenging issues in a positive way

- Continue to iterate on your blueprint by initiating an after-action assessment

CEO Role: Act

Taking Action in the Midst of Divergent Belief Systems

The strategies discussed as part of Listen, Facilitate, Assess and Protect identify *what* association CEOs need to do to steer through challenging issues.

Taking action involves identifying *how* you will address the issue in light of your association's mission, vision and values.

To execute, confirm two core underlying premises:

1) The action you are taking is rooted in clarity of purpose, goals and beliefs

2) The action you are taking is informed by direct communication with stakeholders, including employees

Steering Your Association through Uncertainty: Strategies for CEOs and Boards

Corporate organizations that successfully manage uncertainty intentionally engage their stakeholder communities in positive ways. These three strategies below offer practices that associations can use to navigate wicked challenges.

Partner with Stakeholders	Build Alliances	Make Principled Choices
Gain the trust of all stakeholders in your field or industry through ongoing dialog and invitations to engage.	Engage directly with peer groups to understand their interests and compelling issues, as well as stay informed about the macro-environment.	Take positions that are clear, consistent and in alignment with values and communicate them clearly.

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Acting Checklist

Lessons learned from association CEOs

- Engage and educate all levels of staff in messaging to assure consistency and clarity

- Acknowledge and communicate the breadth of engagement on the issue

- Reflect on the consistency of decisions made on this issues and those preceding

- Communicate decisions clearly

Case Studies

Case Study: National Governors Association

- NGA launched the "Disagree Better" initiative to help leaders identify a more positive and optimistic approach to dealing with differences and disagree in a way that leads to finding solutions and solving problems, rather than engaging in endless bickering.

- The Disagree Better initiative aims to highlight existing solutions that various groups around the country are already implementing. It also involves featuring Governors who exemplify productive disagreement.

- The initiative acknowledges that conflict resolution requires effort and difficult conversations. It emphasizes the importance of healthy conflict to find common ground and improve families, communities, and the nation.

ASAE. (2023). National Governors Association inaugurates the "Disagree better" initiative. The Power of Associations.
https://powerofassociations.org/news/2023/08/national-governors-association-inaugurates-the-disagree-better-initiative/

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Case Study: National Organization of Minority Architects

- When the U.S. Supreme Court issued a ruling invalidating Roe v. Wade, NOMA was going ahead with its annual meeting in Nashville, but the ruling triggered a [Tennessee law banning abortion in the state](#) which was a direct challenge to NOMA's organizational values.

- The *Dobbs* ruling was a unique concern for NOMA because members could be penalized for taking on projects that include women's health clinics where these reproductive healthcare needs take place; NOMA had already faced some criticism among members for holding its conference in a conservative state.

- Their first step was acknowledging the challenge many members were facing. NOMA [released a statement](#) announcing a charitable donation to a social-justice organization in the state and took steps during the conference to address members' concerns.

ASAE. (2022). How One Association Handled a Difficult Conference-Location Decision. Associations Now. https://associationsnow.com/2022/12/how-one-association-handled-a-difficult-conference-location-decision/

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Case Study: American Library Association

- The American Library Association faced internal turbulence when the appointment of its president, a self-identified "Marxist-Lesbian," sparked controversy within the organization.

- The appointment triggered varied reactions, leading to internal discord among members with contrasting ideologies. Disparate belief systems clashed, raising concerns about the association's leadership and its alignment with diverse viewpoints within its membership base.

- To address this, the ALA initiated open forums and facilitated dialogue sessions. They aimed to foster understanding, respect, and inclusivity, acknowledging diverse perspectives while reinforcing the shared goal of promoting intellectual freedom and equitable access to information. Through these measures, the association navigated the complexities of managing divergent beliefs, emphasizing unity in purpose while valuing the richness of varied viewpoints within their community.

Kingkade, T. (2023). Top librarian calls "Marxist lesbian" tweet backlash "regrettable." NBCNews.com. https://www.nbcnews.com/news/us-news/american-library-association-president-marxist-lesbian-rcna98254.

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Appendix

The Value of Rethinking Deeply-Held Beliefs: Adam Grant

Hear about themes like changing your mind because of better logic or stronger evidence (14:15), binary bias (19:00), and how similar values are not beneficial without disparity of views...dissent makes us smarter (23:15).

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Sample Framework #1:
ASAE

ASAE Evaluation Criteria

ASAE staff and leadership should consider the following when evaluating whether it is appropriate and advisable to make a public statement about national and societal issues:

- **Connection to the association management profession:** Issues specific to association management are most appropriate for statements.
- **Applicability to ASAE Board Approved Position Statements or guiding documents:** Issues that explicitly apply to a specific ASAE Board Approved Position Statement or guiding document (e.g. Strategic Priorities – Destination 2026, Standards of Conduct) are most appropriate for statements; issues must at least generally apply to a policy or guiding document and be consistent with ASAE's Mission Statement for a statement to be appropriate.
- **Business impact:** Statements that would create threats to association business, membership, or brand reputation shall be considered with caution; the impact of inaction also must be considered.
- **National interest:** Issues of national interest are most appropriate for statements from a national association.
- **National trends:** Statements provided by other industry associations (e.g., US Chamber of Commerce, National Association of Manufacturers, SHRM, and US Travel) may influence ASAE's statement strategy.
- **Message clarity:** Association statements should be issued only when there is a clear and concise message, including a specific call to action whenever possible.
- **Leadership and collaboration:** Association statements that demonstrate ASAE's leadership or provide opportunity to collaborate are preferred.

ASAE Decision-Making Process and Timeliness

Decision-Making Process
1. Use the Statement Criteria Scorecard to help evaluate if a statement is appropriate and beneficial.
2. Draft a potential statement according to the Statement Elements.
3. Vet the draft statement by the chief executive officer, Advocacy Council, executive committee, and/or board of directors, as appropriate.

Timeliness
To demonstrate leadership in alignment with the brand, ASAE should issue statements within 24-48 hours of an issue's emergence. However, speed shouldn't compromise strategy. It's most important to get the statement right and vet through appropriate stakeholder groups.

ASAE Societal Statement Framework Scorecard

The scorecard is a tool to help evaluate whether a statement is appropriate.

*"Significant risk to the association" is defined as something that would have a measurable impact on ASAE's membership, reputation, or financial stability. In some cases, ASAE's policies might compel action even when there is significant risk. In other cases, lesser risks—such as distraction from current priorities—might be important enough to discourage action.

ASAE Societal Statement Framework Scoring

Place "X" next to appropriate declaration within each section		An issue that meets minimum criteria suggests an association statement *may* be appropriate. Meeting the minimum scoring criteria doesn't mandate a statement. A statement might be appropriate without meeting the criteria. Use this scorecard to frame discussion and decision-making.
X	Scoring	**Connection to association management** *(Select all declarations that apply)*
	3	Is specifically connected to the association management profession
	2	Is connected to the association meetings industry at large
	1	Is connected to the general population (e.g., business or for-profit sectors)
	0	IS **NOT** connected to the association management profession, meetings industry and/or general population *(Mutually Exclusive Response)*
	Sum	Subtotal: Score of at least 1 **required**
X	Scoring	**Applicability to ASAE policy or guiding documents** *(Select one declaration)*
	3	Explicitly applies to specific ASAE policy, guiding documents, Standards of Conduct, or Board Approved Position Statements and/or the Power of Associations
	1	Generally applies to ASAE policy, guiding documents, Standards of Conduct, or Board Approved Position Statements and/or the Power of Associations
	0	Does **NOT** apply to ASAE policy, guiding documents, Standards of Conduct, or Board Approved Position Statements and/or the Power of Associations
	Sum	Subtotal: Score of at least 1 **required**
X	Scoring	**Statement Reach** *(Select all that apply)*
	1	Is a national issue
	1	Is an opportunity to lead or collaborate externally
	1	Is strongly aligned with ASAE's strategic future - Destination 2026
	Sum	Subtotal: Score of at least 1 **required**
		Total: Score of at least 3 **required**
X	Scoring	**Further Review** *(Select all that apply)*
	1	Is one for which many related industry associations *(e.g., US Chamber of Commerce and/or U.S. Travel Association)* have made statements *(Requires ASAE Executive Review)*
	1	Is one for which a planned statement could create a significant risk to the association* *(Requires ASAE Board of Directors Review)*
	Sum	Subtotal: Score of at least 1 **requires further review**

ASAE Position Statement: Elements

Statements should be short, clear, meaningful, and appropriately toned. Preferably, all statements will:

- Include a specific call to action related to a clearly articulated goal. This helps ensure the statement is strategic and purposeful, rather than empty talk.

- Be as concise as possible (ideally 3 sentences or less), briefly articulating why ASAE is making the statement, with links to applicable ASAE policies or guiding documents and, if relevant, other supporting evidence. If additional commentary is necessary, the concise social-media-friendly core statement should be easily identifiable at the beginning of the larger statement.

- Avoid additional commentary that is unnecessary to achieve the above criteria.

- Avoid emotion-based statements attributed to the association itself (ASAE is "disappointed by" or "saddened by," etc.). Statements of emotion are better expressed as statements from individual people, such as the president or CEO. The association as an organization or membership body has positions (policies, etc.) but not universal personal emotions.

ASAE Position Statement: Other Actions

The following steps should be taken when considering or releasing an association statement:

- Evaluate the impact on business operations. Even when a statement poses no serious threat to the association, issuing a statement is often significantly disruptive to routine business operations, distracting from other association messages and increasing member inquiries and feedback (positive and negative) that might merit a response by staff.

- Consider component and industry association collaboration, consultation, and information. In the least, ASAE should alert a directly affected allied state or location association or convention and visitor's bureau (CVB) to a statement before it is issued. ASAE should also consider the perspective of other industry associations (e.g., US Chamber of Commerce, National Association of Manufacturers, SHRM, and US Travel.

- Clarify roles for managing questions and feedback. Identify a clear process to collect, review, and respond to questions or feedback.

- Communicate to Board and staff. Alert Board and staff when a statement is about to be released, with clear instructions about how to triage or otherwise respond to questions or feedback.

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Sample Framework #2: American Society of Anesthesiologists (ASA)

Sample:

Framework to Guide Discussion for Comment or Statement Development

American Society of Anesthesiologists

Mission: Advancing the Practice and Securing the Future

Vision: A world leader improving health through innovation in quality and safety

Values: Patient Safety, Physician-led Care and Scientific Discovery

Strategic Pillars:
- Advocacy
- Educational Resources
- Leadership and Professional Development
- Member Engagement
- Quality and Practice Advancement
- Research and Scientific Advancement
- Financial Performance and Operational Excellence

This framework is designed to provide a consistent set of considerations for approaching issues or topics on which ASA may decide to comment or issue a more formal statement or position. It is a purposefully subjective tool that relies on the experience and judgement of the leaders, stakeholders, and decision makers who will utilize it. It will continue to be refined and improved as it is utilized.
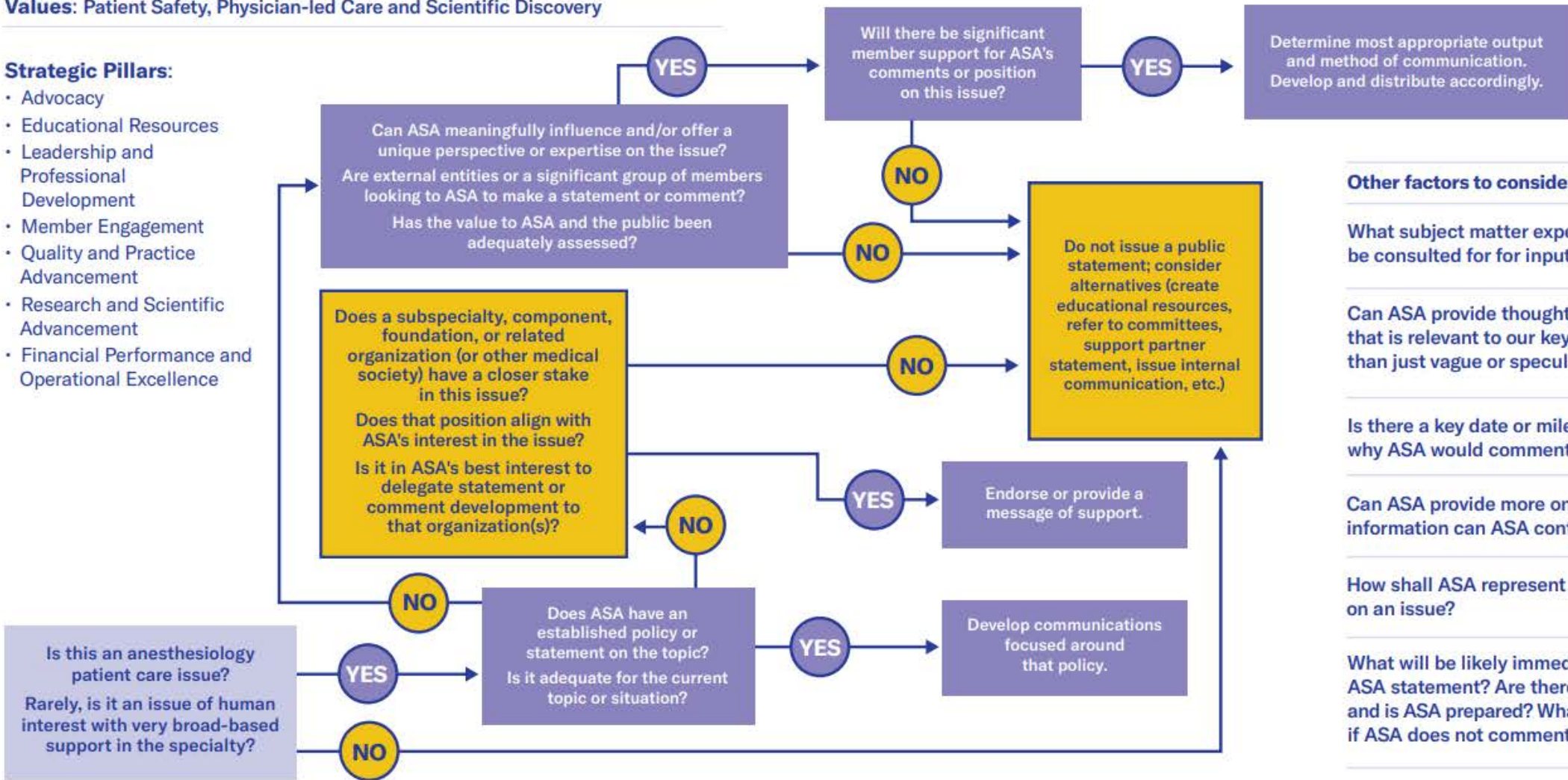
Can ASA meaningfully influence and/or offer a unique perspective or expertise on the issue?
Are external entities or a significant group of members looking to ASA to make a statement or comment?
Has the value to ASA and the public been adequately assessed?

Will there be significant member support for ASA's comments or position on this issue?

Determine most appropriate output and method of communication. Develop and distribute accordingly.

Does a subspecialty, component, foundation, or related organization (or other medical society) have a closer stake in this issue?
Does that position align with ASA's interest in the issue?
Is it in ASA's best interest to delegate statement or comment development to that organization(s)?

Do not issue a public statement; consider alternatives (create educational resources, refer to committees, support partner statement, issue internal communication, etc.)

Endorse or provide a message of support.

Is this an anesthesiology patient care issue?
Rarely, is it an issue of human interest with very broad-based support in the specialty?

Does ASA have an established policy or statement on the topic?
Is it adequate for the current topic or situation?

Develop communications focused around that policy.

YES / NO

Other factors to consider:

What subject matter experts (SMEs) or committees can be consulted for for input?

Can ASA provide thoughtful and substantive commentary that is relevant to our key stakeholder audiences rather than just vague or speculative statements?

Is there a key date or milestone that impacts when and why ASA would comment? Is timeliness important?

Can ASA provide more on this topic? What resources and information can ASA contribute on the issue?

How shall ASA represent significant diversity of opinion on an issue?

What will be likely immediate responses/reactions to an ASA statement? Are there any unintended consequences, and is ASA prepared? What are the potential consequences if ASA does not comment on the issue?