Governance, Risk, and the Future of Learning with Glenn Tecker

Leading Learning Podcast
Transcript for Episode 462

Celisa Steele: [00:00:03] If you want to grow the reach, revenue, and impact of your learning business, you're in the right place. I'm Celisa Steele.

Jeff Cobb: [00:00:10] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Jeff Cobb: [00:00:16] Learning businesses are facing tremendous pressure to adapt. Technology, shifting learner expectations, and crowded markets are challenging the long-standing models of education, certification, and governance.

Celisa Steele: [00:00:29] Our guest in this episode, number 462, is Glenn Tecker, chair and co-CEO of Tecker International, a multinational consulting practice that has worked with associations around the world for more than 40 years, primarily on strategy. Glenn is also co-author of three textbooks published by ASAE (the American Society of Association Executives), and those textbooks are required reading for the CAE (Certified Association Executive) credential. And he's a long-time advisor to association CEOs and boards.

Jeff Cobb: [00:01:01] Glenn and I talk about major forces he sees reshaping continuing education and credentialing—from adaptive learning platforms powered by AI to new security risks to the accelerating pace of change for knowledge and competencies.

Celisa Steele: [00:01:16] You and Glenn also dig into governance and culture and talk about why a culture of inquiry matters, what enables and blocks innovation, and how boards can be more effective partners to staff.

Jeff Cobb: [00:01:28] And Glenn emphasizes the role of risk management and experimentation, showing how organizations can move forward with confidence even in uncertain times.

Celisa Steele: [00:01:37] This conversation can help you, dear listener, develop a clearer picture of the forces shaping the future of learning in associations and other learning businesses. And that clearer picture can help you act more effectively.

Jeff Cobb: [00:01:56] Glenn, you're somebody that I've wanted to talk to for a very long time now because of all that experience you have with organizations in the association world in areas like leadership and strategy. But, of course, my interest is primarily in learning. Serendipitously, I'd seen you weigh in on some learning topics recently, and I think we'll be able to dive into a few of them here. Specifically, you had commented on a post in an ASAE forum, and the post

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was about AI and learning. You said, and I'll quote you here, "The future of much adult learning will be adaptive, curated by AI, and integrated with peer and mentor interaction." I agree completely, but I'm interested in what led you to that conclusion. What are you seeing that makes you feel like that is definitely the direction we're going in?

Glenn Tecker: [00:02:48] The evolution of adaptive learning platforms, particularly with a kick from AI, is moving to the point where continuing education, assessment of the education, assessment of the learning, and provision of the credential are blending into a single place. The traditional barrier that existed between membership organizations who provided continuing ed and credentialing organizations who provided certificates and certifications is melting away. There's law and procedure. ANSI [the American National Standards Institute] and a variety of other accrediting agencies still require a degree of insulation so that the politics and economics of a membership organization do not influence the delta weights, validity, and reliability of assessment methodologies, but technology is about to drive significant change in that area. What led us to understand that is we have been involved with adaptive learning technologies that are being used already, primarily by the medical community. A significant one is available for internal medicine. A significant one has been created, interestingly enough, by *The New England Journal of Medicine*, which is owned by the Massachusetts Medical Society—not a lot of people know that. It's also being used in engineering.

Glenn Tecker: [00:04:15] What's fascinating about it is that it recognizes that the wall that used to exist between teaching and learning has now come down. And, when you move from viewing what you do from teaching (the provision of information) to learning (access to information), the modalities that are available for learning and adaptive learning platforms are unlimited. It could send me to printed copy. It could send me to a simulation. It could send me to a group of mentors that would talk to me about an issue. It could send me to a project that a small community of learners would engage in. All of those things are possible. In the adaptive learning platform, what they're also doing is assessing the preference of learning strategy that works for you. When it gets to the point where you're having a difficulty, it will give the learner advice on which learning modality would work the best for them in that situation. What it also does is it has identified the fact that when people fail on something three times, they're done. It never takes you back the third time to the same thing you failed on last time; it gives you another methodology to use so that you don't click off.

Glenn Tecker: [00:05:38] That, along with the other two things that we're seeing, one of which is the blending of AI and what's often referred to as "quantum computing"—there are many names for it—is going to create major security issues for certification bodies because nothing will be secure. Not even blockchain and encryption will work. The third is the fact that the body of knowledge of most areas is progressing so rapidly, mainly because of AI but not only. What we are seeing is the need to figure out how to anticipate what the necessary skills, competencies, and understandings will be that may not show up in a traditional practice analysis, which looks at what people are doing now. It's really the issue of how can you begin to think about how you will prepare for these circumstances?

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Jeff Cobb: [00:06:42] We've been seeing something similar, and not necessarily AI-driven all the time, but those walls between the learning function and the credentialing function are getting harder to maintain because of the way that learning happens now and needs to happen now.

Glenn Tecker: [00:06:58] What's interesting to us is the depth and breadth of potential assessment mechanisms that are available in the adaptive learning platform are superior to the scope of assessment mechanisms that tend to be available for most of the current credentialing programs.

Jeff Cobb: [00:07:20] Yes, that's true. We want to have these neat little boxes—you do your learning here; you do your testing here—but it just doesn't work as well that way anymore.

Glenn Tecker: [00:07:28] Yes, particularly if you're moving to the ultimate level of learning. You move through what they need to know to what they need to understand to what they value and appreciate to the level of be-able-to. And, if you're going to assess the level of be-able-to, you're going to need some sort of application or simulation. That's highly potential within the adaptive learning platform whereas, up to now, it's only been possible if you've been face-to-face demonstration.

Jeff Cobb: [00:07:58] You're not just speaking theoretically here, I know because you've had a platform in place for a number of years now, which you call Howspace.

Glenn Tecker: [00:08:07] We have been using it, yes. It is an online platform specifically designed for group work and decision-making. Its value is that it can be used synchronously and asynchronously. It also has the ability to engage in polling, assessment, and testing. It's integrated into it. We use it now in face-to-face meetings, hybrid meetings, and fully virtual meetings. We've used it for strategic planning. We've used it for education. We have used it for a membership meeting. We've used it for what we call Critical Issue Summits. We've used it now with over 150 associations, not even counting our private sector clients. And we've been using it over three years. Every year it gets better.

Jeff Cobb: [00:09:00] How have you seen it change the trajectory of a group's work when they're using that as the basis for moving forward?

Glenn Tecker: [00:09:08] Good news and bad news. The good news is, in terms of engagement, we see it dramatically increased. Even when it's entirely virtual, we will use Zoom, create small groups to do work together, and document their work and be able to interact with each other in the workspace. It essentially has gotten rid of flip charts forever. The second thing that we see is, sometimes in the asynchronous work, if we haven't done a good job in moderating the conversation and focusing on critical content, we get a signal for that because the participation in the asynchronous work tends to reduce a little bit. We've learned how to pump that up still. The other thing that we see that's of great value, particularly in virtual groups, [is that] participation using the workspace has made the experience and level of contribution of individuals, regardless of whether they are in the room or participating virtually, much more

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equal. An organization is able to get a much wider array of differentiated perspectives involved in the conversations and the thinking.

Jeff Cobb: [00:10:23] This requires a different mindset on the part of the learner and on the part of the facilitator, and maybe a little bit of a different skillset too, to really take advantage of working in this way.

Glenn Tecker: [00:10:34] What we've found is the skillset is pretty much already obtained by participants. If you use Facebook, if you use any of the social media platforms, even e-mail, then this is easy to use. It doesn't require loading any application. You simply get an e-mail with a link, you click on it, and you're there. We are finding more and more folks, particularly in the scientific communities but not only, completely comfortable with this kind of sharing of information. What's different is the AI that is integrated into it, which is mostly but not entirely a large language model, allows for near-instant curation of the ideas that are being generated. It facilitates the group being able to build on and build from what they've already learned or what they've already been suggesting. Interestingly enough, this platform was originally created in Europe. It began in Finland. Its primary use in Europe is in companies who use it for ongoing continuing education targeted to the particular needs of their staff cohort. We've adapted it for our uses in associations, primarily with strategic planning and problem-solving.

Jeff Cobb: [00:11:59] If what you're describing is the future—and I believe it is along with you— what does that look like for your average association who's still basically relying on conferences and Webinars? They see that as what's manageable, what's easy, and what scales, but they need to shift in this direction. What does that look like, and what happens if they don't, from your perspective?

Glenn Tecker: [00:12:22] If you are driven by revenue and not by learning, then the traditional online Webinars and traditional sit-in-a-room-and-listen, maybe with a Q&A, are probably going to be your best bet. If, however, you want to position yourself to continue to thrive in an environment where folks now are demonstrating less ability to find the dollars and the time to participate, then you're going to need to move to more interactive programming and a commitment to folks actually learning rather than simply being exposed. What we know, for example, is that traditional online learning reaches the levels of awareness and understanding, but it never reaches the levels of be-able-to. If your learners are looking to be able to execute something as a result of the investment in what you're providing, and you're not giving that opportunity, they're going to go somewhere else.

Jeff Cobb: [00:13:26] And you're seeing it as a hard tradeoff from a revenue standpoint? Are there revenue models in your mind that would support this type of learning approach?

Glenn Tecker: [00:13:36] Yes, there are. The reason being the savings of online environment are not that greater than the savings of the use of this technology, which is far more interactive. Again, it can be used in face-to-face. We use it that way. It can be used in hybrid. It can be used in fully virtual. But this platform is not the only one that's emerging. What I believe is that, in the future, most associations are going to have to do fewer things of greater value for more

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targeted groups of people. And, if that's the case, then what we're going to find is that their employers and their constituents are going to demand that investment of time and money, whatever it is, enable them to do something different or better—not that they can just go to the staff meeting and talk about what they learned about, but, in fact, they're able to execute something well. People will take that risk when they previously had an opportunity to try their hand at executing it so that, when they are doing it for real, it's not the first time they've done it. That's a fundamental tenet of adult education as it's been discussed for the last 25 years. Now there is an economic driver behind the need to attend to that.

Jeff Cobb: [00:15:10] How engaged are you seeing associations' CEOs and boards with this sort of shift that's happening? Do they really engage with learning as a strategic driver, in your experience?

Glenn Tecker: [00:15:22] I'll draw a distinction now between the credentialing organizations and continuing education organizations. Unless the continuing education organization is what we call well heeled—it has substantial revenue and participation—it's lagging. The credentialing organizations are either already moving in this direction or thinking seriously about it. That's occurring at the governance level. My suspicion is that the membership organizations, which are primarily continuing ed and maybe offer certificates but not necessarily an accredited credential, are increasingly going to find board members—if they are composing their board members of individuals with some expertise in the business lines of the association and not political representatives of the various components of the organization—they're going to find their boards asking questions along these lines, and their ability to provide alternative answers to those questions is what's going to position them for success. "If this is the issue that the board is raising, then here are some of the alternatives. Here are the advantages and disadvantages of each alternative, and here's the one that may work best for us."

Glenn Tecker: [00:16:41] That provides the board with knowledgeable information upon which to make a decision that they can feel comfortable with. Some of these things some boards think are high-risk. The critical ingredient here is that staff provide a risk management process along with a commitment to experiment so that each step in the development of this new way of doing things is accompanied by a set of criteria that you have to get a yes to before you move to the next step so that, if it's not working, you're able either to abandon or to adapt before it becomes a sunk course. For staff being able to provide that—a laddered or sequenced risk management process—tends to allow governance to be willing to take the risk because they know if it's not working, we're going to get it early on, we're either going to fix it, or we're going to try something else.

Jeff Cobb: [00:17:47] What governance structures do you find either enable or block the adoption of these types of new approaches to anything? (But we're talking about learning, obviously.)

Glenn Tecker: [00:17:56] What we are finding in common is increasingly a movement to ensure that, on the board, there are some individuals with experience and expertise in the business

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lines that the association is involved in—not necessarily instead of representation from the "owners" of the association, whether it's chapters or components or multiple associations, but along with. What's interesting to us is this is a metaphor for what for-profit companies have been doing for decades. On the for-profit boards on which I've served, we've got two kinds of directors. We've got inside directors, who are the staff and representatives of the major stockholder groups, and outside directors, who are there because they possess independent expertise in particular areas of importance to the organization. The differentiation in perspectives and experience creates a more holistic view of the possibilities and the challenges. Those are the boards that we find are most able, at the governance level, in consultation and partnership with staff, to engage in the three purposes of a board: to set direction, to establish strategy, to provide oversight, including making sure that the allocation of investments matches what it is they're trying to accomplish in the strategy. That's a trend we are seeing in composition in all three or four of those kinds of nonprofit organizations.

Glenn Tecker: [00:19:42] It's a movement to creating a knowledge base so you can have additional confidence in the judgments that you're making. We're seeing some transition strategies being used. A lot of organizations do not understand that a board has the authority to invite anyone to participate in its meetings it wants to. Even if you're using Robert's, O. Garfield Jones, or Sturgis, the board has that authority. They can participate as equals in the conversation. You just can't give them a vote. Having that kind of expertise available in the conversation is possible without necessarily fighting a bylaws change. Some groups are moving to do this either in policy or simply in practice. And then, once the organization becomes comfortable and enamored of what it enables decision-making to do, then it may move to memorialize it in a bylaws change. Now, associations have always asked advisors to come or contracted with consultants for particular activities. This is different because this is asking for an individual, like all board members, to stay apprised of the theme and direction. That's strategic thoughtfulness. Strategy is about seeing patterns. Strategy is about looking at alternatives and being able to see the pros and cons in each, given what you anticipate current and future circumstances will be.

Glenn Tecker: [00:21:15] If you have someone who's able to do that relative to the major business lines you're involved in, particularly education because it is changing so rapidly and under such duress, it is essential. I say "under duress" because the primary problem that adult education is facing at the moment is too much. Literally, the field is saturated. There are so many alternatives of huge variance in terms of quality, price, and acceptance that the very choice of where to go is increasingly a question that people are asking Copilot, ChatGPT, or whatever AI system they are using. Now, what AI does here is, in those cases where you're asked for recommendations, its choice tends to be based on what it harvests from that body of information based upon what's there the most. Unfortunately, in the continuing ed area, most of the stuff there are promotions by people who are offering or selling it, so it has little to do with quality.

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Glenn Tecker: [00:22:33] The last observation I would make in regard to this, we are seeing more and more not-for-profit organizations recognizing the value of distance learning as it's been practiced by higher education for over a decade. If you are looking for the objective of your learning to be people not just being aware of and understanding but being able to, then what we are seeing and what our market research continues to affirm is that what most folks are looking for is access to learning that is affordable, that is reasonably accessible (online), but they also want to be able to spend time with their peers and with the experts from whom they are learning. In most cases, they would prefer that that time be face-to-face. If it cannot be face-to-face, then the technology of the distance learning classroom—which is a series of periodic gatherings with work that occurs during the gathering and in between the gatherings, executed by subgroups of the full group as an application of what they've learned from each other or the expertise—tends to be what most folks are looking for.

Jeff Cobb: [00:24:00] Yes, we've felt for years that there's not been enough focus on cohort-based learning going on in the association world. As you're saying, the academic world got that a long time ago, probably because it's built off their traditional models so well, but they've gotten good at it. In many cases, we're seeing that academic continuing education departments are booming right now. The rest of academia is under fire, but continuing education is doing great, and they're in a position to eat the lunch of many associations in different markets.

Glenn Tecker: [00:24:30] Yes. If associations don't abandon the old habit of simply providing Webinars in response to one of the three demands, which is easy access and affordability, they're going to be, I believe, left in the dust by the other providers of learning. Associations are still in the information provision business. They have not yet, many of them, graduated into the business of creating opportunity for learning. We're seeing, for example, some movement towards things like open space learning, where folks can get together online or face-to-face and ask questions of each other, and there are major caveats there. The major caveat is, if there's no one in the group with experience and expertise in the area, then essentially what they're sharing are common practices, and common practices are not effective practices. It's the old expression that used to say, "Practice makes perfect." Practice doesn't make perfect. Practice makes consistent. If you're doing the wrong thing 100 times, I'm fairly certain you're going to do the wrong thing again the 101st time. That's the dilemma, the caveat that exists with the movement towards not exemplary but innovative methodologies that are attractive. They're innovative because they're different, but they don't meet our definition of innovative.

Glenn Tecker: [00:26:00] For us, an innovation is a change that makes something better. If it doesn't make it better, it's not an innovation; it's an experiment. You can learn from it, you can grow from it, but it's not an innovation. What we're really seeing is those places that are succeeding in continuing ed, in certification, in credentialing—whether it's certificates or certification—are those organizations that are recognizing that an innovation requires that the change makes something better. Assessment and evaluation at the level of the individual's ability to effectively apply what they have learned becomes increasingly important. Now, if you tie this back to the history of associations, associations that provide certificates carefully warrant

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that the certificate does not guarantee that the individual's performance will be any better as a result of attendance. It warrants they've been exposed to the information. Credentials even don't warrant that it guarantees the individual's performance will be improved. The warrant in a credential is the individual has demonstrated mastery of the body of knowledge they've been exposed to. But that's different than assessing the ability to apply.

Jeff Cobb: [00:27:32] What role does culture play in all of this? Because everything we're talking about is going to require overcoming a lot of "We've always done it this way." I'm not sure associations are more susceptible to that than other organizations, but they certainly are susceptible. They've got to break through culturally to make the shift that we're talking about.

Glenn Tecker: [00:27:52] The culture change is to move to what we refer to as a culture of inquiry, where the expectation is that hard questions will be asked about what we're doing or anything that's proposed. It's the individuals who are known for saying, "Is there a downside here? Can you imagine if…? I wonder what would occur when…. Have we considered alternatives?" The process of thinking strategically is the application of the discipline of strategy at all levels of the organization. Strategy is a discipline, not an event that produces a product. The culture change is to move to a strategic mindset from an analytical mindset, even from a creative mindset. That tends to address the issue of "We've always done it this way." Being willing to experiment. Here again what we observe is many boards have policies that commit them to innovation, but that policy also needs to commit the organization to experimentation—not many associations have done that. They will commit to experimentation if part of that commitment is requiring that risk management process be part of any proposal of a new initiative or experiment. That gives them a level of comfort. The simple way to put it is, if you say to the board, "We want to try something new," what's the first question the treasurer is going to ask?

Jeff Cobb: [00:29:29] What's it going to cost? What's the downside?

Glenn Tecker: [00:29:31] And, if you say to the board, "We've tried it; we tried something, and it didn't work," what's the first comment the treasurer is going to make?

Jeff Cobb: [00:29:40] How much did that cost?

Glenn Tecker: [00:29:41] Exactly. What we're looking for is a methodology that allows folks to be able to track that potential problem before it occurs. That tends to create the willingness to take the risk.

Jeff Cobb: [00:29:55] Yes, I like that focus on the risk assessment component. You mentioned that earlier in the conversation as well. That does get overlooked so much. If you get the pieces in place, if you're an organization that is forward-looking, what should it look like, say, five to ten years out? What should the learning function of a successful organization, an organization that wants to stay relevant, what's that going to look like in your mind?

Glenn Tecker: [00:30:19] Jeff, you just hit what we find to be the most frequent and egregious error of thinking groups, planning groups, design groups within association communities. It's

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the failure to take the time to agree on the outcome we are trying to achieve before we end up in debate about what paths to take. It's the failure to create an envisioned future of what would constitute success before we begin to assess, "What are the potential paths to get there?" And when you fail to agree on the outcome first, two things happen. One, anybody can be right or wrong because you have no benchmark against which to make the judgment. Second, you usually end up saying yes to the idea that's presented by the loudest mouth that talks the longest or the idea that is supported by the individual who talks last before we have to adjourn so we can make a decision and get home. What we are teaching organizations to do, particularly as it relates to these issues of evolution within continuing education, is to make sure that you agree on what will constitute success before you begin the conversation about what paths you should take to get there.

Jeff Cobb: [00:31:45] If you're somebody in an organization—this is going to describe probably a lot of our listeners—where you've got some authority, maybe you're a senior leader, but you're not yet the CEO, you're not in the C-suite yet, and you're trying to drive innovation, strategic thinking through the organization to get people to buy into that outcome that you're ultimately going to try to get to, what's your advice to that person? How can they help to drive that sort of innovation and strategic thinking in the organization?

Glenn Tecker: [00:32:16] It's traditional and classic advice. One, identify what would constitute a benefit or accomplishment for the individuals whose influence or participation you're trying to seek. Make sure that you are able to identify how the movement you are suggesting will in fact add to the things that are important to them. Second, you want to use incremental success. You want to demonstrate what's possible by taking small steps to get there. Once you've taken a couple of small steps and earned the reputation for being able to achieve the promise that you're making, then it's much more likely that you'll be given the opportunity to increasingly take larger steps. What you want to avoid is making a promise that you can't keep. Honesty is critical here. If there are risks involved, make sure you identify them. If there are bumps along the way, make sure that, when they occur, you have a methodology for figuring out how to overcome them. Demonstrating that you have in place a plan—a plan that's sufficiently flexible and nimble to be altered based upon changes and circumstances—is absolutely critical. This is a point in time where assuring that you have the core competencies involved in being nimble is an essential ingredient for any organization or unit that wants to commit to an innovative approach.

Jeff Cobb: [00:33:58] I like to ask guests, whenever I can, about their own lifelong learning and what their habits, what their practices are for staying sharp and continuing to grow. What are some of yours?

Glenn Tecker: [00:34:12] I am a sponge for information. A significant portion of my time is spent taking a look at thinking that other people are doing. A large portion of my time, and the reason I so much enjoy what we do as a firm, is that we are constantly learning from our interactions with the folks that we serve. We work with our clients in a partnership. We're not a group that flies overhead as a helicopter, takes a picture, and tells you what to do. Our process is one

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where we're in partnership. We consider what the choices are—and sometimes we know more about them than our clients—and then, with our clients, make the choice about what the best paths are to get there. That process itself is an immensely rewarding process for learning. I have the neurodivergent attributes of being dyslexic and ADHD. My dyslexia has required me to learn from context, so I tend to be very sensitive to things that are occurring around me, and my ADHD has made it uncomfortable for me to spend the same time anywhere, one place at once. So I'm always moving and active. Being sensitive to what's going on around me and being constantly active in interacting with others, those are my primary learning strategies.

Celisa Steele: [00:35:45] That wraps up our conversation with Glenn Tecker, chair and co-CEO of Tecker International, but hang around for our recap.

Jeff Cobb: [00:35:53] You'll find show notes and a transcript for this episode at leadinglearning.com/episode462, along with a link to the Tecker International Web site. Glenn's also open to your e-mails at gtecker@tecker.com.

Celisa Steele: [00:36:10] If you found this episode valuable, we'd be grateful if you'd share it with a colleague. That helps more people find the show and benefit from it, and it supports the work that we do.

Jeff Cobb: [00:36:19] In the conversation, Glenn highlighted the powerful forces reshaping learning and credentialing: adaptive platforms powered by AI, looming security risks, and the accelerating pace of change in knowledge and competencies.

Celisa Steele: [00:36:33] He reminded us that thriving in this environment requires not just new tools and structures but a culture of inquiry at the governance level and a willingness to experiment.

Jeff Cobb: [00:36:43] And to make experimentation possible, staff need to provide clear risk management processes. That way, boards can move forward with confidence, knowing they'll learn quickly from what works and what doesn't.

Celisa Steele: [00:36:56] Thanks again for listening, and we'll see you next time on the Leading Learning Podcast.

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