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From the first Great Lakes Christmas Ale poured at the Opening Reception to the last note played by Cloud of Shame at the Closing Reception, the 29th Holiday Showcase was once again a can't-miss opportunity for association and meeting professionals to connect, celebrate and get business done. The CEOnly® Seminar and brand-new Welcoming Environment® Summit rounded out a full day of education that pumped up attendees before they explored the newly redesigned tradeshow floor.



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Blowing Away Stereotypes: Moving Beyond Diversity to a Welcoming Environment™

By **Connie Arkus**

“Was there really anything new to learn about diversity at the Summit?,” a colleague asked me when I told her I had attended and participated in the Association Forum’s inaugural Welcoming Environment™ (WE) Summit held at Holiday Showcase 2017.

“Definitely,” I responded and asked her if she had heard the term “starter marriages,” which was discussed during the program. She had not and was intrigued, which is a good way to create interest in a topic that is still “fresh” despite what many may think. This Summit definitely wasn’t ho-hum. More on starter marriages later.

R-E-S-P-E-C-T!

At its core, **respecting each other’s uniqueness and initiating courageous conversations** were the key messages of the WE Summit™. The Summit focused on engaging participants and faculty in thoughtful dialogue on diversity and inclusion, appreciating each other’s differences and understanding the value that cultural competency can provide to associations.

Association Forum CEO Michelle Mason, FASAE, CAE, kicked off the event by welcoming participants and introducing Jim Zaniello, FASAE, President and Founder, Vetted Solutions and 2017-2018 chair of the Forum’s Welcoming Environment Committee. In 2017, Zaniello’s firm published the study, “Diversity and Inclu-

sion: Core Values Among Associations.”

There were four main sections to the Summit: a visual explorer exercise, keynote address, panel discussion and a legal segment. Each session emphasized respect and dialogue.

A Photo Can be Telling

Bob Moore, CAE, DELP* scholar, member of the WE Committee and Chief Operating Officer, American Dental Hygienists Association, got the attendees talking when he asked each to participate in a visual explorer exercise by selecting a photo that appealed to them from a stack on each table. After choosing, one person held up his or her photo, and others at the table were asked to comment on what the photo said about the person. Each person took a turn.

“People generally ‘guessed’ correctly,” Moore observed. He also noted that some groups delved deeper, uncovering less obvious personality traits.

This led to Moore discussing “unconscious biases, which are social stereotypes about certain groups of people that individuals form out-





Association Forum Welcoming Environment™ is defined as the creation of a sense of belonging and connectedness that engages individuals in an authentic manner in which uniqueness is valued, respected and supported through opportunities and interaction.

A Welcoming Environment™ drives deeper engagement and increased participation with the Association and will ultimately increase revenue and build sustainable relationships.

side their own conscious awareness. Everyone holds unconscious beliefs about various social and identity groups, and these biases stem from one's tendency to organize social worlds by categorizing."

Moore's session stimulated thinking about unconscious bias and provided a good segue to the keynote address by multigenerational expert, James Pogue, PhD, on "The Real Deal on Diversity: Empowering Courageous Conversations about WE." (Pogue was the closing speaker at Forum Forward 2017.)

Going Beyond Superficial

With his easy-going style, Pogue covered a variety of topics related to initiating courageous conversations, from explaining Multi-Generational Intelligence (MGI) to the Vulnerability Paradox to Bystander Behavior to The Five Things You Can't Discuss and more.


He talked about many ways to initiate meaningful dialogue, and his engaging manner got people talking immediately. Pogue told the group how a young woman he had met told him she was going through a divorce but that it was okay because it was her "starter marriage." He then asked the audience what its initial reactions were to those words. The group responded: "Typical Millennial. No loyalty. Reluctance to commit."

He then told the group that he politely questioned the young woman further and uncovered much more about her life beyond that startling phrase. She came from a small town and was pressured to marry at a young age. She and her husband moved to a large city, and she soon confirmed something that she knew all along: She was a lesbian. The woman and her husband parted amicably.

Pogue demonstrated that going beyond the superficial blew away stereotypes. Being vulnerable and asking questions can lead to making a connection and understanding what makes the person who she or he is. This is critical in the workplace. (A separate article on Dr. Pogue's Summit presentation will be published in a future issue of FORUM.)

Practical Conversations and Steps

Next up was the panel discussion on "Solutions for Association Leaders," moderated by Sharon Allen, MBA, CDM. Dr. Pogue was joined on the panel by Nikki Palluzzi, Senior Manager, Member Services, National Association of Personal Financial Advisors and Josie Hernandez, Trainer/Program Manager, Institute of Real Estate Management. They discussed how subtle bias can be more pervasive than blatant discrimination and the barriers to successful cultural integration in a welcoming environment.

Wrapping up the Summit, Norma Zeitler, a director at Barnes & Thornburg, LLP, one of the sponsors of the WE Summit, discussed various ways to protect organizations from legal landmines. "Courageous conversations will stop a lot of harassment," Zeitler said. "Metra's slogan, 'See Something, Say Something,' should be your motto. 

Connie Arkus is an experienced association executive who enhances the success of organizations through marketing, communications, publications, and committee and board support. She may be reached at connie76455@comcast.net.



**Diversity Executive Leadership Program through the American Society of Association Executives.*

C-Suite Breakfast: Becoming the Workplace Your Strategy Demands

On November 10, 2017, executives from a variety of associations convened at Association Forum's offices for an in-depth and interactive discussion led by Donna Brighton of the Brighton Institute and sponsored by Travel Alberta.

As President and Founder of the Brighton Institute, Donna Brighton is a recognized thought leader in organizational culture and change leadership training. She serves as President of the Association of Change Management Professionals and has worked with executives across a number of industries in her 25 years of consulting.

The C-Suite Breakfast, "Becoming the Workplace Your Strategy Demands," centered on understanding, assessing and shifting the culture in your workplace. Attendees were asked to think about their current culture and whether it was helping or hindering the mission and goals of their organization.

"If you don't understand the 'why,' the 'how' becomes less important," Brighton explained. Often, leaders can find themselves bogged down in the process points and details of the organizational structure, neglecting to reinforce the mission of projects or of the organization as a whole. As examples, the attendees discussed various for-profit entities that had succeeded in building a successful culture, including Ford, Microsoft and Airbnb.

At one point, the discussion turned towards an organization that had recently undergone a dedicated and intentional reform of its culture—the

Chicago Cubs. The Cubs had floundered in mediocrity for generations, but when new ownership and front office management came in, they made culture a priority by changing the way the players interacted, building trust and focusing on a positive attitude. The result was the Cubs first World Series championship in over a century.

The parallel from the Chicago Cubs that can be drawn to the association space is that culture can be defined by how you play the game and understanding what are the rules of that game. Hiring good talent is important, but just as important is setting clear expectations for how that talent works together as a team.

Most association executives understand that workplace culture is important, but having that knowledge and implementing change to ensure the culture aligns with strategy are two entirely different things. The former is an idea. The latter, an action. To make the necessary changes that will drive business and accomplish organizational goals requires demonstrable actions and adaptable behavior that begins at the top.

The goal of Association Forum's C-Suite breakfasts is to bring together association executives for a collaborative learning experience that spurs conversation and allows for the open exchange of ideas to further the missions of associations.



CEOnly Seminar: The Future is Now!

Association CEOs Look Ahead

The CEOnly Seminar at Holiday Showcase 2017 was an opportunity for association CEOs to gather, converse and learn from each other. Over 80 executives filled the Crystal Ballroom at the Hyatt Regency to kick off their day with an in-depth look at the future, both from a broad perspective and through the lens of the association industry.

The keynote speaker for the event was Byron Reese, an author, CEO and well-known futurist. For a man whose job is “futurist,” Reese spent a good amount of time talking about the past. He took attendees on a journey that began 100,000 years ago with the creation of fire, making dedicated stops along the way at the first wheel, the introduction of the written word and the eradication of smallpox. The idea behind this voyage, as Reese laid out, was that every major turning point in human history was tied to a technology advancement. In the past, those advancements could be separated by thousands of years. Today, every week seems to bring a world-changing development. The most important of these advancements—the one that promises to up-end the world we know and the way humanity operates—is artificial intelligence, or as Reese puts it, “Outsourcing what our brains and bodies are doing.”

Next up to speak was Matt Sanderson, President & CEO of SmithBucklin. Sanderson presented

a sneak preview of “20 for 2018”, the newest edition of SmithBucklin’s annual publication Circuit. Now in its 15th year, Circuit addresses 20 topics that will impact associations in the coming year. Sanderson highlighted three of the sections from the publication: Loyalty, Content and Learning. Punctuated by both anecdotes and data, he discussed how associations should be approaching these topics, the related issues facing the industry and the changing ways with which associations will need to operate.

The event concluded with a panel discussion in which Reese and Sanderson were joined by Kimberly Mosley, CAE, President of the American Specialty Toy Retailing Association and Pauli Undesser, BS, CAE, MS, MWS, Executive Director of the Water Quality Association. The group took questions and discussed the future of associations, using the previous presentations as a launching pad for the conversation.

For more on Circuit, turn to page 48.



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Do you think Thomas Edison would have invented the electric light if he focused only on "improving the candle?"

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IRS Public Disclosure Requirements

This Law Review was written by Susan Feingold Carlson and edited by Jed Mandel, both of whom are founding members of Chicago Law Partners, LLC. CLP serves as the Association Forum's general counsel.



Q: We received a call the other day from an individual asking for a copy of our annual Form 990 Information Return. Are we required to provide it?

A: Yes. In general, the Internal Revenue Service (IRS) requires exempt organizations to make their exemption applications and annual returns available for inspection and copying by any individual who requests such information. The requirement affects all organizations exempt from federal income tax under Section 501(a), including, among others, trade associations, professional societies, certification boards, foundations, and other charities. Federal law establishes specific requirements governing the scope of exempt organization materials that must be disclosed, the manner in which they are to be made available, and the timeframe in which they must be produced.

With limited exception (relating to organizations that filed an exemption application before July 15, 1987), every exempt organization must make its exemption application (e.g., Form 1023, Form 1024) available for inspection and copying upon request. Requesting parties are entitled to the application, as well as any supporting materials submitted with the application and the determination letter issued by the IRS. In addition, each exempt organization must make available its annual return, whether the organization filed a Form 990, Form 990-EZ (short form), Form 990-PF

(private foundation), or other return. Any Section 501(c)(3) organization also must make available its Form 990-T, Exempt Organization Business Income Tax Return, including any schedules, attachments, or supporting documents relating to the imposition of tax on the organization's unrelated business income. Except for private foundations, exempt organizations need not disclose names or addresses of their individual contributors (i.e., the information set forth on Schedule B of the application). Annual returns must be made available for a three-year period beginning with the return's due date, including any extensions (or later, if not filed on time).

Individuals may request the right to inspect and/or copy an organization's exemption application, determination letter, and annual returns (all with supporting documentation) in person at the organization's principal office or at any local office with three or more employees. Such in-person requests are to be honored the same day on which they are made; thus, it is important for every exempt organization to maintain copies of the subject filings on the premises of its principal office (and, if applicable, any local offices) in a place where they can readily be accessed and copied. If an individual makes a request in writing instead of in person, the exempt organization generally has thirty days to respond.


An exempt organization may charge reasonable copying costs and the actual costs of postage for providing the copies, provided it notifies

the requesting party of the approximate cost and acceptable form of payment within seven days of receipt of the request. Requesting parties may pay by cash or money order for an in-person request, or by certified check, money order, personal check or credit card for a written request. Currently, up to 20 cents per page may be charged as "reasonable copying costs."

The federal law includes an exception that allows organizations to satisfy the requirement to provide copies by making their filings "widely available" as defined by IRS regulations, e.g., by posting them on their own Website, or that of a third party, but the exception has significant limitations. First, the filings must be posted in a format that exactly reproduces the image of the original document, such as a PDF, and allows the user to access, download, view, and print the document without payment of a fee. Second, the exception does not extend to an organization's obligation to make its filings available for public inspection when requests are made in person. Thus, copies must nonetheless be maintained on site. Finally, organizations should recognize that third-party organizations, like GuideStar, which publish annual returns, do not typically publish Form 990-T returns online. As a result, any organization that files such a return should not rely on GuideStar, or a similar third-party source, for purposes of satisfying its obligation to make copies available.

The IRS may impose penal-

ties of \$20 per day on any organization that fails to provide copies of filed documents as required. The maximum penalty for failure to provide a copy of an annual return is \$10,000; no maximum exists for failure to provide a copy of an exemption application.

As organizations consider the procedures they should put in place to address requests for inspection and copying of IRS filings, they also should consider related matters, such as an overall record retention policy, who has authority to speak on an organization's behalf, and the manner in which staff members should respond to telephone inquiries requesting IRS filings or any other information. Establishing clear and easy-to-follow policies regarding those matters will benefit the organization both by increasing efficiency and reducing uncertainty and potential risks. 

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From Surviving to Thriving: 3 Essential Habits to Navigate Change and Create a Hero Culture

By **Michael Hahn**

The world is changing rapidly and according to IBM, we create 2.5 quintillion bytes of data every day. In fact, data is being created so fast that 90 percent of the data in the world has been created in the last two years. That's astounding, but let's face it, the rate of change is only going to increase going forward. So what can you do to ensure your association not only survives, but thrives in a marketplace that's evolving at lightning speed?



Michael Hahn
CEO
Beyond Good Teams

Making sure you have the right people in place is key, but you can't stop there. You must also provide the right environment, tools, and development opportunities to create a culture that inspires people to be heroes. Here are three habits that will enable you to create a hero culture:

Design a Winnable Game

Your people must deliver the brand promise to the customer, and if they feel their hands are tied, they could be playing an unwinnable game. Many times, leaders say things like "Let's drive the ball down the field and score some touchdowns." However, employees' daily duties tend to be much deeper in the weeds and require greater attention to detail than those leaders may want or need to understand.

That's why it's vitally important to not only define the vision for your association, but also clarify the acceptable guard rails for success. That way, employees can fully embrace the autonomy required to deliver the mission. If they don't feel they have that flexibility or fully understand the guard rails, they will default to playing it safe and do the minimum.

Designing a winnable game for your team may include:

- Defining the right business strategy to grow into new markets
- Aligning employee performance with association values
- Investing in the training and development of employees

Once you've designed a winnable game, then you can shift your focus to executing the strategy and delivering on the mission of the association. This will require change and employees must be willing and open to give and receive feedback. So, they must...

Assume Positive Intent

When you make a change to your business strategy or process, your employees will be forced to change their habits. During the transition, many employees will stretch themselves—or even stress themselves, and when complications occur, mistakes are bound to be made.

Miscommunications happen in fast-paced environments and you must understand the underlying behavior that caused the miscommunication before you jump into corrective mode. More often than not, people have good intentions, but complications occur that can cause them to fall short of the desired outcome. Criticizing or disciplining an employee who is behaving in the right way, but who failed due to some uncontrollable circumstance, could end up rewarding the wrong behavior; which can have a villainous effect on your culture. You need to assume positive intent to determine the root cause, so you can provide the appropriate coaching.

If you've designed a winnable game that is worth playing for your people and you are assuming positive intent, then you have a choice...


Choose Happiness

People need to know that what they are doing matters and that they are making a difference. If not, coming to work can feel like Groundhog Day week after week and month after month. As a result, employees can default to misery instead of choosing happiness. Here are my tips to help your employees choose happiness:

- Celebrate the milestones—no matter how small they seem
- Recognize your people—early and often
- Encourage their passions outside of work

We all have the same 168 hours in our week, but the absolute best business leaders focus on recognizing others for what IS working just as much as what is NOT. In fact, the ideal ratio is 1:1 recognition to corrective feedback.

So what does this all mean?

Having a hero culture starts with you, no matter your title or level of leadership. You are a role model for the acceptable beliefs and behaviors of your company, and it's not what you say, but what you do that has the biggest impact on others. If you are struggling to create a culture of heroes, the most effective way to inspire change in others may be to jumpstart the transformation from within. 

Michael Hahn is an international speaker and culture expert. He consults with senior leaders seeking to maximize employee engagement and create a hero culture. He is the author of *"Hero Habits: The Guide to Thriving in Corporate America and in Life,"* and you can reach him at **630-220-9628** or by visiting MichaelHahnSpeaker.com.



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Preparing to Face Today's Risks & Hazards: Is Your Organization Ready?

Knowing What to Do Before, During and After
a Disaster is the Key to Continuity of Operations

By **Bob Mellinger**

Organizations today need a comprehensive, integrated plan in place to protect people, property, technology, and, to the greatest degree possible, their reputation and financial viability in the face of a myriad of risks. Your disaster response and business continuity plans should cover as much as feasible and make business recovery possible. Overriding all, however, is personal safety and the need to preserve life. These are always the top priorities.



Bob Mellinger
President
Attainium Corp.

It's not just terrorism, natural and man-made disasters, legal liability (injury, violence, etc.), and government regulations that threaten your operations. Consider these actual events and their potential impacts:

- Your web server is the target of a distributed denial-of-service (DDOS) attack
- 150 protestors block the entrance to the hotel site on the opening day of your national conference; a large number of them stage a sit-down protest in the main lobby/registration area.
- A newly fired employee returns to the workplace with a gun and starts shooting. Do you have a plan to deal with an active shooter on the premises?
- It's Friday afternoon and you get a call from your primary cloud provider to inform you that they are shutting down operations immediately. What now? Do you have a Plan B?

Reputation damage, litigation, and other factors increase the odds against business survival; there is significant potential for loss of income if you are not prepared. It's entirely possible that one ruined or badly-handled incident might result in extensive revenue losses and require years of rebuilding reputation.

The First Step

Before anything happens, the most critical activity you undertake is planning. Knowing what to plan for is the first challenge. How do you plan for and survive disruptions you can only imagine? It's not possible to be prepared for every possible situation; you have to concentrate on those that are most likely to occur. It's vital to determine the risk of each potential disruption and to decide on which to concentrate your resources.

Most important is to keep things in perspective. Any consequence that involves potential critical injury or loss of life must take precedence over less critical outcomes. It's necessary, therefore, to prioritize the risks as well as to identify the ones on which to focus. You can do that by using a "what-if" approach.

Ask yourself, "What if...?" What if a part of the roof collapsed? What if the keynote speaker died in mid-sentence? What if the chairman of the board was taken hostage? Develop a comprehensive list of such threats that you can then use to go through the planning process. This is the age-old problem/solution approach to planning and is a good way to start. Does your organization have unique threat potential due to its location or climate? Are there groups that take issue with your practices or beliefs, or those of your clients? Also, what is a threat this month

may not be a threat next month, so you have to continually review the current situation.

Mitigation: Isn't it better if the disruption never occurs?

Mitigation is everything you do to prevent a disruption from occurring or to minimize its impact. It's planning early and carefully for security if you are hosting a high-visibility individual. It's having a tested backup and recovery facility for your critical operations in case a broken gas line shuts down your building. It's having at least one plain old telephone that gets its power from the Telco line versus an electrical outlet.

Mitigation activities can be identified by reviewing your vulnerabilities and/or plans to determine what can be done NOW as opposed to waiting for a disruption. This kind of planning is one of the best ways to help ensure that your operations can continue without significant disruption.

Response

The response period begins at the start of the disrupting event and continues until the situation has been stabilized. You need to build response capability into your plans in order to minimize the immediate impact of any disruption. If you have a meeting scheduled at a local hotel (where your attending members and staff also are staying), and the hotel burns down while they're at a luncheon several blocks away, what are you going to do? The hotel ultimately is responsible, but you can't tell your attendees it's not your problem. At the very least, you need to provide assistance in dealings with the hotel and their contingency plans. In addition, you may need to get on the phone and assist the members in finding other accommodations and helping them figure out how to replace personal belongings and lost medications.

You can best handle the response to any disruption if, in your planning, you created a crisis response team that you can call into play. Just as you can't possibly plan for every vulnerability, you can't possibly pre-determine responses when unexpected disruption occurs. But you can transform other plans to help you deal with this, and you can hold drills to practice working

under pressure and as a team. You also need a designated spokesperson—someone who will deal with the media (when necessary) and other groups confidently and forthrightly.

One thing to remember about responding to threats and hazards is that, despite different causes, the general flow of activities is similar. There is an "all hazards approach": try to save people, secure the situation, get everything under control.

How soon can we operate again?

After any disruption, all we want is for things "to get back to normal," but this seldom happens. There is usually a "new" normal after a disruption. Things have changed. Some classic examples of this are the impacts of Hurricanes Harvey, Irma and Maria and the Las Vegas shooting. Businesses and homes damaged by the hurricane may take months or years to be repaired, and many businesses may never reopen. There's no real estimate of when power will be restored in Puerto Rico and the US Virgin Island. The shooting in Las Vegas will create a new normal for many concerts in terms of where they are located and the security required.

We want actions in the recovery stage to enable us to minimize the long-term impact of the disruption on the organization. In the case of a food poisoning incident, for example, recovery might mean immediately inviting health officials to investigate, getting in a new vendor for any remaining meals and publicizing this to your members personally and via the media. The food poisoning wasn't your fault, but your reputation is at risk regardless.

While each situation has its unique risks, your overall plan does not have to be reinvented for each situation. You can easily customize your planning to incorporate the mitigation and response required for varying situations. Just remember that, in each instance, you need specifically to consider any risks that could significantly impact you or your members' safety and reputation.


“Before anything happens, the most critical activity you undertake is planning. Knowing what to plan for is the first challenge. How do you plan for and survive disruptions you can only imagine? It’s not possible to be prepared for every possible situation; you have to concentrate on those that are most likely to occur. It’s vital to determine the risk of each potential disruption and to decide on which to concentrate your resources.”

Awareness and Training

The important final step in this planning process is ensuring that everyone is aware of the plan and can follow it. You must test the plan regularly to keep it current and ensure its viability. What happens, for example, when a disruption occurs and all of a sudden you discover that the person in charge of a critical piece left the company six months ago? Finally, the plan has to be easy to use. Don’t make it easier for people to run for the door than to locate the correct procedure in the plan (of course, if the plan is tested and people are trained, this shouldn’t be an issue).

Summary

The job of business continuity is an overwhelming one, particularly when viewed from the perspective of planning to survive the threats and hazards that can impact organizations today. Planning is the key to making it through. The risk assessment process can help you identify and prepare for the myriad of disruptions you might face. Mitigation activities actually can reduce certain threats. Response plans that are communicated effectively mean that everyone knows their role in the event of any disruption.

Recovery plans help reduce the amount of downtime to the facility. And training, testing and evaluation are critical to keeping plans accessible, current, and effective. 

Bob Mellinger is the President of Attainium Corp. He can be reached at bmellinger@attainium.net. Bob presented the course, The Disaster Experience – Before, During and After at Association Forum on January 25, 2018.

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Contact Information

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michele.neyer@ihg.com
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Destination Stats

Accommodations: Great Rooms
Room Rates:

High: \$229

Low: \$129

Resort Fee: No resort fees.

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Total Indoor over 4,000 sq ft
Total Outdoor: We also boast 1000 sq ft outdoor patio for events.

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“We will definitely be back. The banquet service at Hotel Indigo was incredible. The servers made our event fantastic. Hats off to the Chef as well, we've been at several hotels and by far this was the best food and presentation!!!! Thank you again for hosting us. We look forward to our next event at the Hotel Indigo Historic Savannah”

- Kris, Barron
Event Venues Inc.

“I just wanted to take a moment to “THANK YOU” the entire staff at the Hotel Indigo Historic Savannah for our group event this past week. We were extremely pleased with all aspects of our event, ranging from the meeting set-up to the food to the AV support. Everything was done professionally and I felt like the staffs were checking in with me frequently to ensure that all details were taken care of.”
Every aspect of the hotel is beautiful!

- Meghan
Revolution Republic



Destination Meetings: Are They Right for Your Association?

By **Carol McGury**



ssociation executives are increasingly feeling compelled to host destination events and with good reason. A recent event-industry study reported that 78 percent of the respondents listed destination as a top driver for event attendance.

The 2017 Decision to Attend Study, conducted by the Professional Convention Management Association (PCMA), the International Association of Exhibitions and Events (IAEE), Destinations International, the American Society of Association Executives (ASAE), Meeting Professionals International (MPI) and the EXPERIENCE Institute, provides some interesting insight into the reasons why individuals decide to attend—or not attend—conventions and exhibitions. For example, the study found that 85 percent of attendees are likely to return to an event if the destination experience is positive, and 92 percent listed education as the main reason they attend conferences.

Additionally, association executives are eager to engage young professionals who, as several surveys of Millennials indicate, want experiential activities. But there are risks. How do you ensure attendees won't be lured away from their seats by local adventure offerings? Will it be all play and no work? Will the location inhibit an attendee's ability to get a supervisor's approval to attend?

The pros and cons could be debated endlessly, so why not stick to the basics? An annual meeting that delivers highly relevant educational content, provides unparalleled networking, and carries through the organization's value proposition will keep all stakeholders actively engaged, regardless of where the event is held. By combining experiential design with a fun, engaging venue and location, you will provide that "added value" that appeals to attendees.

When faced with a destination event decision, ask these four questions: 1) Does the location/venue meet the strategic objective for the event? 2) Does it meet the wants and needs of all of my stakeholders? 3) Is it consistent with the mission and vision of the organization? 4) How can the destination be incorporated into the event to provide a memorable experience for attendees?

Here are some examples of how associations have developed successful approaches to holding a destination meeting.

Define Event Strategy

Setting strategy begins with clearly defining the event objective, which is most likely to further the association's mission and provide valuable offerings attendees cannot get elsewhere. As you design the overall event experience, it's important to also understand the individual objectives of your stakeholders (the attendees, the sponsors, the exhibitors, the speakers, etc.) and include those objectives in your design framework.

If the location becomes the priority over education delivery, for example, the value of the event can actually decrease. Conference attendees want education and networking opportunities, and if those aren't up to par, it won't matter that there are palm trees outside.

The National Association of Orthopaedic Nurses (NAON), a nonprofit consisting of 6,000 members that strives to enhance the lives and careers of orthopaedic nurses, sets clear objectives for its events. For example, the objectives for NAON's upcoming Annual Congress include "to impact patient outcomes through adoption of best practices and innovation," and "to contribute to a professional environment that encourages collegiality and networking among participants."

When it comes to choosing the location that will help complete these objectives, NAON focuses on practicality.

"We review many different aspects of the venue," said Kristin Dee, NAON's executive director. "How easy is it to explore the city on foot? Is there a NAON chapter in the area? Where do most attendees travel from? Has NAON held an event there recently? All of this and more goes into the decision process."

The organization also considers ways it can further its mission while onsite. For a future event, NAON plans to tour a hospital and learn from the local nurses while delivering some unique experiences in the host city by hiring local bands and bringing in the flavor of the Southwest location.

“The event location is a critical business decision for an organization, so approach it as you would any other business decision. Avoid emotional decisions involving individuals’ personal opinions. Instead, leverage data.”

Of course, just because the organization is practical doesn’t mean the members don’t know how to have fun. Cities in the Southeast are always popular destination choices for NAON, where the attendees have danced nights away in Margaritaville-themed parties. As long as the objective of the event is the driving force behind decisions, fun can always be built in.

Elicit Feedback

The event location is a critical business decision for an organization, so approach it as you would any other business decision. Avoid emotional decisions involving individuals’ personal opinions. Instead, leverage data.

What is the total cost for a potential attendee? Determine where members and potential attendees are located and the impact of the destination on their travel expenses. The same goes for exhibitors. What are shipping costs and how would they affect exhibitors’ participation in the event? Present your board with a model of each of the types of participants and their associated costs to attend.

If attendees are flying to the event, staying at the venue and then leaving immediately after the event closes, the destination is less likely to matter to them because they won’t have time for sightseeing. On the other hand, if attendees are extending their stay or traveling with families, a more compelling destination might increase attendance.

Regardless, a city shouldn’t be ruled out just because it’s not seen as a “destination” location.

“Our event planners typically visit the potential city before signing the contract,” said Dave Weil, Vice President of Event Services at SmithBucklin. “They scope out the venue, how accessible everything is and what the city offers in terms of free-time activities. We also talk to local members and other associations that have held events at that venue to gain a better understanding of what to expect.”

The National Society of Genetic Counselors (NSGC)—an organization dedicated to advancing the various roles of genetic counselors in health care—surveyed its membership on preferences for events.

“The findings from that survey showed our members prioritize our educational programming, so they don’t have much downtime during the event,” said Meghan Carey, NSGC’s executive director. “We also discovered through conversations with members that they prefer events that are held in the fall and don’t occur during work or school holidays. Our members are spread throughout the United States, so they want events to be easy to travel to and cost-conscious.”

Serve the Mission and Vision

As part of this crucial business decision, determine if an event destination reflects the organization’s mission and vision.

Where do potential members live and, if reached through the event, could they help build the organization’s membership? Where does the association need more visibility so it can better advocate its brand? Where will attendance be the highest?

These are questions that the association team serving The International Society of Transport Aircraft Trading (ISTAT), a 4,000-member organization dedicated to providing aviation professionals with forums for increased networking and educational opportunities, thinks about when deliberating an event location.

“ISTAT is unique in that, being an aviation association, its members have traveled often and have a ‘been there, done that’ attitude about typical destination locations,” said Cynthia Cortis, ISTAT’s event director. “Members go to meetings mainly to network and learn, not to explore a new place. As a result, our main consideration when choosing a destination is how we can best evangelize our


product—the association.”

In the past, ISTAT has gone to cities throughout Asia to increase its outreach with Asian airlines that might be interested in learning more about the organization. South America is the next region where the association wants to gain more visibility. ISTAT also reviews what other associations in the industry are doing, and makes a point to host events in alternative locations.

Weave in Culture

Once you have your strategy set for the destination, make sure you bring local flavor and the distinctive personality of the locale into the theme of the event. Most attendees will spend the majority of their time in educational sessions or on the show floor, so it's important to bring the outdoor environment inside. It will make the event more memorable and fun.

When ISTAT held an event in Edinburgh, they carefully considered how to embrace the Scottish culture without overwhelming attendees. The event planners hired ballet dancers in kilts to serve as guides throughout the conference. They also brought in local foods and flowers, had a punk rock bagpipers band play at the opening reception and set up whiskey distilleries on the show floor. In the Jet Fuel Coffee Café—a place for attendees to relax, recharge and network—Scottish books were displayed and available for purchase. These little touches added to the attendee experience and made the travel fare all the more worthwhile.

“Consider what the city offers that can’t be done anywhere else, then give that to attendees,” recommended Cortis. “They will leave the event more knowledgeable and connected than before, and with a great cultural experience they probably wouldn’t have had otherwise.” 

Carol McGury, MPS, is Executive Vice President of Event and Education Services at SmithBucklin, the association management and services company. She serves as Chair-Elect of the Professional Convention Management Association Education Foundation, and she is Co-Chair of INCON, an international partnership of association and event management companies. She can be reached at (312) 673-5902 or cmcgury@smithbucklin.com.

Key Findings from IAEE's 2017 Decision to Attend Study

85% are Likely to repeat attendance at the same event and 77% a different event, if the destination experience is positive.

Attendees to Destination Meetings Are:

53% Likely to Extend Their Stay

55% Likely to Turn Their Trip Into a Vacation

49% Likely to Bring Others With Them

79% Likely to Get Out & About

Respondents Rated as Very Important/Important:

89% Transportation Options

89% Appears Safe

86% Appears Clean

86% Wayfinding / Ease of Getting Around

85% Welcoming, Friendly People

78% Service-Oriented Front-Line

75% Variety of Things to See & Do

69% Easy to Access Local Information

38% Easy to Voice Concern / Complaint

Source: International Association of Exhibitions and Events™
www.iaee.com/resources/decision-to-attend-study/



Your Association CEO Will Leave Someday: *Plan on It*

By **John Barnes**





Associations deal with an ever-changing environment with many uncertainties. There is probably only one thing they know with absolute certainty: Your CEO will leave the association someday.

They may leave due to another opportunity, they may be asked to leave by your board of directors, they may retire, or a meteor may drop from the sky as they are walking back to the office from Starbucks. But one way or another, you will eventually be faced with a vacancy in your CEO position.

Every association should prepare for the inevitable. This includes establishing the following plans:

- CEO Succession Plan
- CEO Transition Plan
- Association Improvement Plan
- CEO 60/360 Plan

CEO Succession Plan

Association CEOs should be thinking about who would make a good successor when they leave the association. This can be challenging for a CEO for many reasons:

- **Ego.** The CEO may think that no one in the world could possibly do as great a job as they do. My advice? Get over yourself. Everyone is replaceable, including the CEO.
- **Bandwidth.** Being CEO is a very time-consuming endeavor. Dedicating the time to find potential successors takes time away from other work.
- **Misinterpretation.** CEOs are constantly under the microscope. A well-intentioned effort on a CEO's part to help identify someone to fill their shoes may be misunderstood by member leaders and staff. They might think the CEO already has plans to leave or the board is unhappy with the CEO's performance.

Once you get past these three challenges, there are three places a CEO can find his or her successor: the senior staff team, other association staff, and fellow CEOs.

The most natural candidates are members of the senior staff team, although not all of them will make good CEO candidates. Some of them might not even want to be a CEO. Still, this is the obvious group for potential candidates. CEOs should help them, mentor them, and provide them with the professional development they need to take the next step up the ladder, but shouldn't feel threatened by their growth. They should help them get better at what they do and help them attain the skills they would need were they to become an association CEO someday.

The next group to think about are staff people just below the senior staff team level. They may not be candidates to be CEO immediately, but shining staff stars should be identified at this level and provided the same support, mentoring and professional development. They are then in a position to be promoted should one of the senior staff team leaders depart, and they may become good candidates for the CEO position in the future.

The association CEO should also look externally for current CEOs to be considered as a replacement. Other CEOs might want to move to your association, or there may be staff people below the CEO level who are ready to make the move to the top position. Identify them, connect with them and stay in touch with them.

CEO Transition Plan

Before the inevitable day comes when the CEO leaves the association, the board of directors and the CEO should establish a CEO Transition Plan to which they can turn. The elements of an effective CEO Transition Plan include:

- **Role responsibility.** Who is the individual responsible for ensuring that the plan is implemented? This is typically the President of the association. The President will lead

“By planning ahead, the association can lessen the uncertainties and anxieties, calm the waters, and help prepare for the future success of the association with new leadership.”

the effort and make sure that everyone is fulfilling the roles assigned to them during the transition.

- **Documentation.** Identifying key documents ahead of time will make for a more efficient transition. Examples of documents to have ready include the current job description for the CEO, the current contract with the CEO, names of financial institutions with which the association conducts business, contact information for the association’s legal counsel, and a calendar of events and anticipated activities for the upcoming 12-18 months. This task can be assigned to the Director of Human Resources.
- **Communication.** A communication plan includes determining who should be notified of an executive departure (staff, leadership, membership, legal and financial advisors, media, and affiliated organizations) as well as a template press release or letter in which the specifics of the departure can be quickly added.
- **Finances.** The Treasurer can work with the Chief Financial Officer to ensure that all appropriate financial institutions are notified and that instructions are given regarding the changing of check-signing authority. They can also quickly develop a financial plan for the CEO transition, including severance pay, outplacement, executive search consultants, and external interim executives.
- **Interim management.** The President, working with the Director of Human Resources and the Executive Committee, should develop an interim management proposal, including the pros and cons of using internal and external interim management, guidance on who makes the selection, and the process for selection. The Board should consider the essential functions of the executive that will need to be filled during the transition period.
- **Executive search process.** The President, working with the Director of Human Resources and the Executive Committee, can develop an executive search process

and a charter for the Task Force on the CEO Search. The plan should include the pros and cons of doing the search in house or engaging an executive search consultant.

Association Improvement Plan

When a new CEO starts at an association, it is an opportunity for a review of the association and a fresh perspective on the issues and challenges it faces. New CEOs are often expected to take a long look at things and propose solutions and address problems.

But association leaders should do their new CEO a big favor and address some of the problems before the new CEO shows up.

Member and staff leaders often know what the major problems are at their association. The problems may go unsaid, or the Board and staff may try to ignore the problems or hope they go away, but everyone knows what the major problems are.

Often some of these major problems can be addressed before a new CEO joins the association. Potential examples of these issues include addressing human resource challenges, establishing a strategic planning process, tackling board development issues, or reviewing tough governance problems.

These are not easy issues but, in many instances, they can be addressed before your new CEO arrives. If you employ an interim executive director you can ask that he or she address the issues. Otherwise, there are numerous association experts that can work with the board and staff on the challenges by identifying the problems, facilitating the decision-making process to come to solutions, and assisting in the implementation of the solutions.

Addressing these problems allows the new CEO to have a fresh start and not be burdened with too many critical issues when he or she starts at the association. It also allows the CEO to not be damaged by having to make some very difficult decisions early in their tenure. This is particularly true of human resource challenges.

By addressing some major problems before your new CEO arrives you will allow for a smoother transition for your new CEO. You will also help to establish an environment at your association which will allow your new CEO to hit the ground running and puts them in the best position to succeed.

CEO 60/360 Plan

Becoming the new CEO at an association is very exciting. A wide range of challenges and opportunities are laid out before the new leader and everyone is looking to them to help lead the association into the future. The association board of directors and association staff want the CEO to succeed and want to help them succeed.

But there is a precarious balancing act that a new CEO needs to maintain: Building the trust of the board of directors and staff and reassuring the board and staff during a time of transition, while also putting in place a new direction for the association, both strategically and operationally.

The first step for any new association CEO is to create a 60/360 Plan: A plan for the first 60 days and for the first year. The new CEO should take the following steps in developing this plan:

- **Review the interview process.** During the interview process, the CEO learned a lot about the association, about the desires and hopes of the board of directors, and they may also have had the opportunity to talk with the association staff. They were also asked to provide their views and thoughts about the association and the direction in which it is headed. The new CEO should synthesize this information.
- **Gather new information.** Information about the association as well as the profession or industry that the association represents. Read through the information to become as educated as possible.
- **Reach out.** Building on the information the new CEO has gleaned from the interview process and the information gathering process, they should set up a series of meetings and phone calls with key member leaders, key staff, external constituency groups, and ask


for their input and advice. Listen and take copious notes.

- **Draft the plan.** Draft the 60/360 Plan. Put what you have heard into two sets of action lists: 60 days and one year. Share the plan with the senior staff team to get their thoughts and input.
- **Present the plan.** Present the plan to the board. Not just the words on the page but prepare a professional presentation for the board of directors on what they intend to do in the next 60 days and in the first year of employment. Facilitate a dialogue with the board to get its input on the plan. Once finalized, get the board to formally vote on the plan.

By taking this approach, the new CEO will have achieved three things that will benefit them throughout their tenure as CEO:

- They will have shown that they will be open to the input and ideas of key individuals and groups from the association.
- They will have shown that they are committed to spending most of their time working on their relationship with the board of directors so that the board-CEO team is as effective as possible.
- They will have received the support of the board of directors for actions required in the next 60 days and the next year.

Any time of change is filled with uncertainty and anxiety. This is definitely the case when an association is going through a change in its staff executive leadership.

By planning ahead, the association can lessen the uncertainties and anxieties, calm the waters, and help prepare for the future success of the association with new leadership. 

John Barnes is President of Barnes Association Consultants. Barnes Association Consultants helps association Boards and CEOs address the wide range of challenges and opportunities facing today's association leaders. Barnes Association Consultants helps association leaders make their associations better. John can be reached at johnbarnes@barnes-consultants.com or 703.321.6866. For more information about Barnes Association Consultants, go to barnes-consultants.com/.

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March 7, 2018

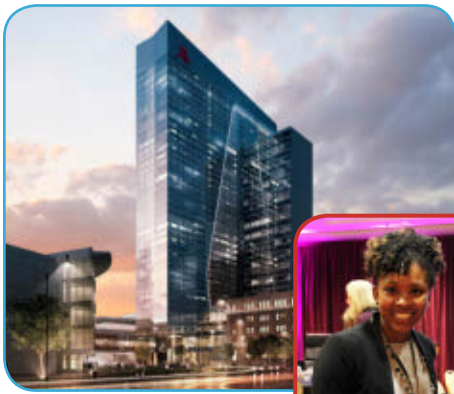
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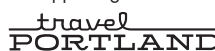


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Risky Business: Protecting Your Organization From Cyber Threats

By Courtney Kiss and Joy Merten

Greg Daniel,
CISA, CRMA
Senior Manager
Johnson Lambert LLP



Greg Daniel, CISA, CRMA is a Senior Manager on Johnson Lambert LLP's Business Advisory Services team. He is an IT expert with over a decade of experience and holds a Master of Professional Accountancy from Bryant University.





cyber security may not be a top concern for associations, but any organization that holds the personal data of its customers, or members, should take proactive steps to ensure that the data is protected. Small associations may think that they are not a target for cyber-attacks due to their size and scope, but that line of thinking is misguided. As with most disruptions, the time to think about cybersecurity is before a breach occurs—not after.

FORUM spoke with Greg Daniel, CISA, CRMA, about how associations, even those with limited budgets, can mitigate threats, prepare for the possibility of an attack and protect the data of the organizations and its members.

FORUM: What are some of the biggest cyber threats to the association community?

Life in the 21st century is tied to the internet. We are connected constantly, both at work and at home. With this reliance, many members of the association community expect certain safety measures to be followed by the online services they use without actual confirmation. As a result, these members become more vulnerable to cybersecurity threats and attacks. The biggest cyber threats impacting our community today are:

- **Malware.** Short for “malicious software,” these computer programs are designed to infiltrate and damage computers without the users’ consent.
- **Ransomware.** A type of malware that prevents or limits users from accessing their system, either by locking the system’s screen or by locking the users’ files unless a ransom is paid. Also known as “crypto-malware.”
- **Pharming.** Malicious code is installed on a personal computer or server, misdirecting users to fraudulent websites without a user’s knowledge or consent.
- **Phishing.** A form of social engineering that uses email or malicious websites (among other channels) to solicit personal information from an individual or company by posing as a trustworthy organization or entity.

Cyber attackers are gaining more sophisticated hacking programs/tools to exploit security vulnerabilities to access sensitive personal data (i.e., Personally-Identifiable Information (PII), for example Name, DOB, Mother’s Maiden Name, etc.) or Nonpublic Information (NPI), for example Driver’s License Number, SSN, Bank Account Number, etc.). These attackers can even restrict access to an entire system from the very individuals that own it!

Associations should ensure they consider data at rest (i.e. data stored on hard-drives, laptops, mobile devices and databases) and data in transit across the internet via email, text message or transfer to a cloud storage device when assessing the risks of cybersecurity threats and attacks.

FORUM: Are certain systems or applications more susceptible to cyber-attacks than others?

The simple answer: we are all exposed. Nearly all systems produced in the last 20 years have an Intel CPU chip. Recently, two serious computer processor unit (CPU) security bugs were found from vulnerabilities in these chips. Both bugs, nicknamed “Meltdown” and “Spectre,” take advantage of a CPU flaw intended to increase computer performance. This CPU feature is used to increase the performance speed of computers by “guessing” what actions the user will take and then storing the needed files or data behind the scenes for quick retrieval if those actions are taken. Though exploitation of this vulnerability requires adept technical knowledge, a hacker could potentially use the Meltdown bug to read a computer’s memory and



steal passwords, photos, and/or other sensitive content residing on the system. The Spectre vulnerability also affects chips from Intel, AMD and ARM that could potentially allow hackers to trick otherwise error-free applications into giving up secret information.

Intel and other technology companies are currently working on updates to protect against these recently disclosed security vulnerabilities. Apple Inc. has released software patches to mitigate both these weaknesses. However, since Meltdown and Spectre are hardware level vulnerabilities, software patches will not immediately solve all issues. Therefore, associations and their members should be vigilant in monitoring for remediation activities from these companies to address security flaws for all systems they use.

FORUM: We frequently hear that organizations should be planning for WHEN they are a victim of a cyber-attack, not IF. However, associations may not have the budgets like some for-profit counterparts to prepare for such events. What can associations—large and small—do now to help protect themselves and their members?

Establishment of an enterprise-wide cybersecurity risk management program is essential for associations to protect themselves and their members against cybersecurity attacks. Adapting a security strategy that uses a preventive and proactive mindset can save the association resources both before and after cyber events occur.

First of all, since the greatest amount of attacks use social engineering (e.g., malware and phishing) training of employees on common security threats is crucial. In this risk management program, associations should leverage a risk framework to document systems, the flow of data throughout these systems, and identify

any assets that would significantly impact the operations of the association or require them to report to their clients. By doing this, associations will have a solid understanding of what sensitive information is at risk and the level of risk for each data asset and/or system.

Associations can then focus their resources on the highest priority risks identified. Other security practices such as intrusion detection systems, penetration tests, etc. can be implemented once higher risks are alleviated.

FORUM: What would be additional steps, projects, or programs that associations may want to consider budgeting for in the future?

As associations and their members continue to focus on activities to strengthen their cybersecurity posture, a key piece after developing a cybersecurity program is establishing a continuous monitoring process. An assessment should be performed to identify potential security vulnerabilities and determine the association's cybersecurity preparedness. The sophistication and the volume of cyber threats will continue to increase, and assessment results need to be evaluated. Corrective actions should be prioritized and tools need to be updated to adapt to the environmental changes that can negatively impact your association.

FORUM: Education is often cited as one of the best ways to protect from cyber-attacks. Do you have any recommendations how associations can help educate their staffs and members?

Human error is indeed the weakest link in organizations reaching their cybersecurity and data protection goals. Therefore, regular cybersecurity training should be held to ensure associations and members are aware of current threats and

“There is a lot at stake – working to avoid and knowing how to quickly respond to these threats is critical for all organizations.”

risky conduct. For example, associations should teach their staff what phishing attacks look like and randomly send fake phishing emails to test the readiness of employees.

If there are budget constraints, associations can have specific members attend the training and have those attendees train the remaining members. In addition, training institutes have lately begun offering some training sessions that can be leveraged by associations and their members at no cost.

FORUM: What conversations might management want to have with the board to ensure appropriate attention is given to cybersecurity concerns?

The accountability of an effective enterprise-wide cybersecurity risk management program relies on the direction of executive management and board. Cybersecurity program leadership must be knowledgeable, and at an appropriate level within the organization to design, implement, oversee, and enforce program requirements. As such, management should have conversations with the board to explain where the association is most vulnerable based on results from an internal or external assessment of the program's effectiveness. In addition, provide detail on what steps are being taken to mitigate those vulnerabilities. Then, objectively assess and report on the program.

FORUM: If an organization experiences a cyber-attack, what should it do?

As part of the enterprise-wide cybersecurity risk management program, an organization should have incident procedures in place. An incident response team should be assembled to effectively assess the situation when a cyber-attack occurs. This team should consist of:

- Data protection experts,
- A tech team that will identify the breach
- Intellectual property experts who will help


minimize the damage and recover every piece of stolen information

- Employee representatives who will deal with incidents that affect employees
- Legal representatives who will provide advice on all the legal implications of a cyber-attack.

Once the scope of the threat has been identified, the organization should secure systems and contain the breach. The communication plan should be executed to officials and to impacted stakeholders. Without an effective communication plan, an organization's reputation will be negatively impacted and may be subject to legal sanctions.

FORUM: As someone who knows the reality of the cyber threats every organization, and even individual, faces, what keeps you up at night?

What keeps me up at night is the reality that these cyber-attacks are taking lives. And I do not mean ruining people's lives by stealing their identity. I mean literally taking human lives. We are on the verge of a perfect storm fueled by more sophisticated cyber attackers and the anonymity of cryptocurrency. My fear is there will be more attacks like the Wanna Decryptor (also known as WannaCry) ransomware attacks that occurred in 2017.

With the vulnerabilities from the “Meltdown” and “Spectre” bugs, attackers can now potentially impact airlines and more hospitals and remain untraceable. For example, the compromise of these organizations' key systems could cause deaths to customers and/or patients, if systems are not unlocked in time to avoid crashes or continue operations to patients. There is much at stake—working to avoid and knowing how to quickly respond is critical for all organizations. 

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By **Connie Arkus**

More Than Just Fun, Improv at Work is Serious Business

Richard Oberbruner

*Communication
Consultant,
Richard Oberbruner
Improv (ROI) Training*



Susan Strunk

*Trustee,
Charleston County
Library Board,
Charleston, S.C.*



Teri Jordan, CAE, CMP

*Chief Meetings and
Education Officer,
Society of Gynecologic
Oncology, Chicago, Ill.*



Bruce Marino

*SCORE Certified
Business Mentor,
SCORE Association,
Fox Valley Chapter,
Naperville, Ill.*



Have you considered using improvisation techniques to improve communication and enhance your teambuilding efforts? Before you quickly dismiss the idea—“Pay staff to play games?”—or groan—“No way I’m going to act goofy in front of my boss”—think again.

The concepts that form the basis of improv are well-suited for application in a business environment. Every conversation you have—from a sales call to a staff meeting to a networking opportunity—is improvised. Understanding the fundamentals of improv can bolster your day-to-day communication skills by improving your listening skills and your ability to think on your feet.

“Improvisation is a high-level form of collaboration,” says Charna Halpern, owner of the legendary improv hub iO Theater. Halpern has spent decades training improvisers, including Tina Fey, Amy Poehler, Chris Farley and countless others. Even within the comedy world, few who train in improv actually perform improv for a living, but

the skills they build help them to succeed in other areas.

“When we are on stage, we have no time to say no to each other’s ideas,” Halpern continues. “We must listen, build on each other’s ideas and make each other’s ideas work. The only way to look good is to make the other person look good. This level of communication and collaboration is essential in the business world.”

With the reality that many associations could become extinct 10 years from now if they don’t change their missions and cultures dramatically, along with the ongoing concerns about engaging and retaining millennial workers, you can no longer afford to ignore the tension when Josh walks

into the lunchroom or not deal with yet another complaint about Stephanie being rude to members.

Even if there isn't a conflict you're aware of, your organization will benefit when you help your employees grow their careers. This includes opportunities for them to develop their interpersonal skills in addition to learning the latest database management system.

Arguably, one of the fastest ways to break down barriers and get staff working together is by engaging people in a range of improv exercises. Several years ago, Richard Oberbruner of ROI Training brought his improv skills to Association Forum's Holiday Showcase. Oberbruner facilitates Employee Engagement Training sessions that enhance camaraderie, productivity and profitability at small to medium-sized organizations. Each session is customized and includes Serious Fun—participating in laugh-filled, spontaneous improv games combined with the seriousness of company objectives.

FORUM talked with Oberbruner and three participants from his workshops, each from a different audience, to discuss how participating in improv exercises can have a significant impact in the workplace.

The Facilitator Perspective

Richard Oberbruner

What does improv have to offer an organization?

Improv is based on collaboration and so are successful workplace teams. I believe that the most competitive companies in the marketplace are the most collaborative in the workplace. The give and take of improv makes an organization more collaborative.

What led you to become a Communication Coach?

In my last workplace, management would conduct weekly meetings and no one would say anything. As soon as the meeting adjourned and staff were back at their desks, the email and phone calls would start, with people talking about issues they should have raised in the meeting. Sound familiar?

I knew why this happened—people didn't feel comfortable or trust their colleagues—but I also thought that the meetings and their predictable aftermath were a ridiculous waste of time and wondered how we could make these meetings more productive. I combined my adult education background and the performance skills that I learned in The Second City Theater Chicago into interactive training techniques.

Describe a typical improv session.

I have an expanded definition of "improv," which includes a

range of performance skills that business professionals can adapt to make their own. During each session, the running order of improv activities can change, depending on the mood in the room.

I generally start with a large-group icebreaker that gets everyone involved immediately. The "Three Move Greeting" has partners creating three actions, such as clapping their hands once, followed by saying "Hi" and ending with a fist bump. These partners then share their three moves with the partners next to them. This foursome then creates a Six Move Greeting and so on.

See what's happening here? It's teamwork growing exponentially. Everyone is fully engaged in the activity, having forgotten that they're working with the person in the office who always leaves a paper jam in the copier. And this occurs in just the first five minutes!

"Building games" are used in the second section—Build a Story, Build a Machine or Build a Scene—where three people create a spontaneous scene with choices that build on each other. For example, Person #1 says: "I am a stressed-out boss." Person #2 enters and says: "I am a concerned colleague offering emotional help." Then Person #3 enters and says: "I am the employee assistance program counselor here to assist." The subtle difference here is that participants add to what's just happened. A "yes, and" approach. Not so in the competitive workplace, where coworkers try to out-do each other.

Next, I facilitate "building variations," such as Build a Mission Statement or Build a Department Goal, where each person in the group adds one word to build a complete thought. For example: "Our ... goal ... is ... to ... work ... together ... in ... a ... way ... that ... brings ... out ... our ... strengths ... and ... satisfies ... members' ... needs." Participants have an equal say in each of these. All are heard, which doesn't always happen in the average workplace.

The final section uses roleplays set in locations specific to the organization, such as the lunchroom, the elevator or the boss' office. Some serious revealing happens here, but by this time, everyone's comfortable with each other's quirkiness.

How is improv successful?

Shared laughter is the difference-maker. It's the glue that sticks everyone together. This is why I call what I do Serious Fun. Yes, you're having fun, but at the same time you're learning how to deal with a serious situation that requires a new approach to working together.

Improv has a way of bubbling up to the surface important topics team members feel but never talk about. Laughing together breaks this silent tension and allows a safe atmosphere

“The concepts that form the basis of improv are well-suited for application in a business environment. Every conversation you have—from a sales call to a staff meeting to a networking opportunity—is improvised.”

to share opinions without hurting anyone's feelings. I love how improv levels the emotional playing field. It promotes the belief that “We're all in this together.”

How do you convince a CEO or executive director to buy into this type of staff “training”?

Create “first followers”! A first follower is someone who experiences the improv techniques and then shares this experience with the decision-makers back at the office.

I recently conducted a Serious Fun improv session for five C-level executives at a for-profit company. They knew they weren't functioning as a team. During the retreat, it came out that the general manager was upset because he hadn't felt “heard,” not just that day but over a long stretch of time.

After two hours of Serious Fun, the other four executives had a “Whoa, what just happened?” moment. The “fun” they were having led to a deeper truth, which is what makes the best improv: revealing truth. The CEO said he learned more about how to get his executives to work together in those two hours of improv than he had during any other type of training session.

Participant Perspectives

Susan Strunk

When did you first experience the potential of improv?

I first heard Richard at a Naperville Chamber of Commerce meeting where he talked about how improv principles could positively impact the workplace. He then led us through several exercises, and I liked the idea immediately. The true heart of improv—spontaneity—doesn't come naturally to me. I like a list—“do this, do that”—but in improv, you have to go with the flow. I saw immediate results in my own interactions with people and observed how others responded to the activities.

You took a chance and brought improv training to your organization. What were the results?

Shortly after the Naperville meeting, I became the director of the Palatine Public Library District and hired Richard for our Staff Training/In Service Day, an event all libraries conduct an-

nually. Our topic was communication, and he was our keynote speaker. In only one hour, I saw sides of employees I never saw before. Everybody was laughing! I couldn't believe how much fun staff was having. We all knew our communication could be improved, and it was, through laughter.

Days later, during a staff meeting, several department heads decided to use a few of the role-playing exercises that we all had participated in during the In Service Day. They thought that the experience they had was so valuable that it could be applied to different issues and shared with other colleagues. We found the exercises to be very unifying.

I also had a lightbulb moment. Since this struck a responsive chord with my Palatine colleagues, I suggested that Richard submit a proposal to present at the Illinois Library Association Conference in Chicago. Richard suggested that I team up with him to provide real-life library scenarios. The two of us, along with another librarian, presented at the conference. It worked out so well that we were invited to facilitate improv experiences at various local libraries.

How is improv effective in the workplace?

Just as Richard says, improv is a fun way to achieve serious results. It promotes teambuilding. It's hard to be mad at someone you were laughing with the day before when doing a roleplay. You make yourself vulnerable, and it mellows you out.

As in most workplaces, misunderstandings occur in libraries, and we needed to improve our internal and external communication skills. For example, some part-time employees may feel left out of the information loop, while other employees may find it challenging working with the public, such as dealing with a patron who refuses to pay late-return fees and raises a fuss.

One exercise I found particularly valuable for enhancing communication was to convey a message in one word. This was very hard to do but so enlightening once we did it. As librarians, we find that sometimes we “over” explain to our patrons when only a few words are necessary. As a result of this particular exercise, we regularly practiced, “What are the best and fewest words necessary to convey our message?” It

made a big difference in how we communicated to each other and our library patrons.

Teri Jordan

What was your improv experience like, and would you recommend it?

When I was the Vice President of Member Services for Association Forum, the Holiday Showcase Program Committee chose Richard's proposal on learning how to apply improvisational games to specific association goals to produce strategic results. Attendees participated in a series of improv theater games to learn how to deal immediately with change as it occurs and work together to solve emerging issues. His session was so popular that we asked him to submit a second proposal; it was selected, and we brought him back the next year, which doesn't often happen.

One of my biggest takeaways was learning how to listen better. We did an exercise where we had to finish each other's sentence and then extend their story. You couldn't respond if you weren't really focused on what the other person was saying. It is vital in today's workplace, which is increasingly more diverse and multi-generational, for employees at all levels to have the skills to work comfortably and effectively with their colleagues. I found improv to be the perfect way to learn how to interact with others. It was challenging and fun.

Bruce Marino

You were pleasantly surprised how effective improv techniques can be. Tell us about that.

Richard was invited to give a one-hour presentation about his improv business at a meeting of the SCORE Association, Fox Valley Chapter. I've been conducting or participating in employee training for 20 years, so I have to admit, when he asked us to stand up, go to the center of the room and form a circle, I thought, "Oh, brother, I don't want to do this."

I was surprised to see that within five to eight minutes, he had people talking, joking and getting to know each other. When participating in the exercises, you forget where you are. Improv takes your full concentration. You have to be listening.

How can you convince a CEO to buy into this type of training?

Richard offers a unique and successful approach to team building and increasing productivity, yet it probably sounds like too much fun to be effective. It is fun, and it is effective. Is letting employees enjoy themselves while learning a bad thing? No. Let me offer some advice: An improv session may be exactly what you need as a first step to get you and your


organization out of the "business-as-usual" mindset and into thinking how your organization can be relevant in the future.

Laugh and Learn

Do you want to make a good team a great team? Are you struggling with low staff morale, low productivity or high turnover and not sure what to do to improve the situation? Or do you simply want to come up with a creative alternative to the annual all-staff outing? "I have one client in the freight business who has clients yelling at them constantly, so they need conflict resolution," says Halpern. "Some need presentation skills for sales people, which include listening, staying in the moment rather than thinking ahead and making every situation a positive."

Consider using improv techniques for a fun way to begin to resolve personnel conflicts or difficult workplace issues, develop employees' interpersonal skills, enhance organizational communication, or unite staff through teambuilding exercises that don't include lectures, notetaking or the same old thing.

"Improv skills translate to any workplace," says Strunk. "The principles Richard uses during the exercises—Trust, Communication, Acceptance, Building and Spontaneity—are consistent and applicable from one organization to another."

She continued: "Our thinking, or our tendency to 'over think,' often gets in the way of a solution or can even make a bad situation worse. Improv opens us up and taps into our creativity. Who doesn't want to be heard, who doesn't want to communicate better?" 

Connie Arkus is an experienced association executive who enhances the success of organizations through marketing, communications, publications, and committee and board support. She may be reached at connie76455@comcast.net.

Improv Organizations

Richard Oberbruner Improv:

www.buildingbrighterteams.com/
(richardimprov@gmail.com)

Improve It!: www.improveitchicago.com/

Second City Works: www.secondcityworks.com
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GOVERNANCE ESSENTIALS: EFFECTIVE PRACTICES FOR STAFF

February 15, 2018
9 a.m. - Noon

Drawing on its rich history of establishing frameworks in which boards of directors are able to function at a high level, AMC has developed this half-day workshop that will present core governance practices with a focus on the "nuts and bolts" of good governance.

Presented by:



Mary Beth Benner, CAE
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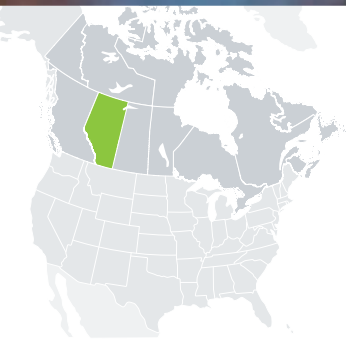


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February 2018

FEB
1

SmartTech Conference

9 a.m. – 4:30 p.m.

OLC Training Center

9400 W. Higgins Road, Rosemont, IL, 60018

The SmartTech Conference is custom-built for association professionals looking to use technology and data more efficiently to increase revenue, drive membership and adapt to today's changing business environment. Learn the roadmap to allow you to leverage data for growth.

FEB
2

Maximizing Attendance: The Human Decision to Attend

11 a.m. – 12 p.m.

This webinar highlights the most recent findings of the industry-supported landmark Decision to Attend Study, conducted for the second time in 2017.

FEB
6

Association 101 – Suburban Location!

9 a.m. – 4 p.m.

OLC Education & Conference Center, 9400 W Higgins #100, Rosemont, IL 60018

An orientation for association professionals, Association 101 is designed to provide a solid foundation of knowledge and appreciation for the unique environment, culture and dynamics of associations.

FEB
6

CAE Study Group

Held weekly on Tuesday evenings from 5:30 – 8 p.m.

APR
24

Increase your chances of passing the CAE exam by joining the CAE study group. Facilitated by current CAEs, the study group meets weekly for a structured case-study series based on the nine domain areas.

FEB
7

Membership SIG February Meeting

9 – 10:30 a.m.

FEB
7

Suburban CAE Study Group

Held weekly on Wednesday evenings from 5:30 – 8 p.m.

APR
25

American Society of Anesthesiologists
1061 American Lane, Schaumburg, IL,
60173-4973

FEB
8

International Conversation Circle

8:30 - 9:30 a.m.

Keep abreast of international trends for associations and exchange ideas and learning with peers about your international initiatives and programs. Please join this first conversation circle and help us get the conversation going!

FEB
8

Large Association CEOly Program: Identification, Cultivation and Succession

11:30 a.m. – 6 p.m.

No one understands the challenges, needs and requirements of an association CEO better than your peers. Identifying, cultivating and developing succession to support talent development and retention is key.

FEB
15

Governance Essentials: Effective Practices for Staff

11:30 a.m. – 6 p.m.

In this session, presented by Association Management Center, participants' understanding of association governance will be enriched by live, face-to-face instruction, lively discussion around governance topics and hands-on interactive activities designed to put ideas into practice.

March 2018

MAR
5

SIG Summit 2018

Noon - 6 p.m.

The Kimpton Gray Hotel, 122 W. Monroe, Chicago, IL, 60603

This half-day education program, open to members, will help you advance your SIG and career goals for the upcoming year, provide you the opportunity to network and collaborate with other members and ensure you walk away with fresh ideas on how to engage with Association Forum in 2018.

MAR
7

2018 Women's Executive Forum

9 a.m. - 6 p.m.

Marriott Marquis Chicago, 2121 S. Prairie Ave., Chicago, 60616

The primary goal of the Women's Executive Forum is simple: bring together the Chicagoland association industry's brightest current and future women leaders to learn from and connect with one another.



Events listed here are Association Forum programs. Further details and registration information can be found at www.associationforum.org. Programs are subject to change.

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International Civil Rights Center & Museum, the Greensboro Historical Museum, Wet'n Wild Emerald Point Water Park, Greensboro Children's Museum and Edible Schoolyard, Center City Park, Replacements, Ltd., plus the Greensboro Science Center and its new treetop adventure course, SkyWild and Carolina SciQuarium, the first LEED certified aquarium in the United States. Greensboro boasts 16 different styles of cuisine and is home to over 500 restaurants. From world-class haute cuisine to down-home, tangy, pit-cooked barbecue, Greensboro's selection of restaurants offers pleasures for every palate. Greensboro is home to Hops Burger Bar, which was recently named the best burger in the nation by Trip Advisor.

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applied, leading to unforgettable guest experiences that improve attendance, foster loyalty and grow revenue. Together we are Perfecting the Event Experience®.

Promotions and Changes



Rana Hutchinson Salzmann has been named the Director of Education for

the Society of American Archivists. Salzmann previously served as Director of Library and Information Technology at Meadville Lombard Theological School. She also spent six years with the American Planning Association in a variety of interdepartmental roles.



The Chicago Association of Realtors® has selected **Michelle Mills Clement**,

MNM, CAE, as its Chief Executive Officer. Mills Clement, who spent several years with Association Forum prior to moving to Seattle, was most recently the President and CEO of the Commercial Brokers Association. She will assume the role in April, following the retirement of longtime CEO, **Ginger Downs, CAE, RCE**.



Beth Sartore, CAE, has joined the American Association of Neurological Surgeons as Associate Executive Director. Sartore was previously the Director, Education Center, for the Radiological Society of North America. In 2015, Sartore was a recipient of Association Forum's 40 Under Forty award and currently serves on the Awards and Scholarship Committee.

New Association Forum Members

Individual Members

Michael Blake, Hotel Technology Next Generation

Judy Czarnik, Association for Manufacturing Excellence

Patrick Derksen, Visit South Bend Mishawaka

Heather Egan, Visit Wichita

Lindsay Ference, Visit South Bend Mishawaka

Gina M. Floro, Electrical Contractors' Association of the City of Chicago

Andrew Hagen, The Westin Chicago Northwest

Dr. Jay Hicks, Joint Review Committee on Education in Radiologic Technology

Ryan Jun, NetSuite

Michael Kutnick, TriNet HR Services

Brian Lawrence, tgd Communications Inc.

David Marsh, Oracle-NetSuite

Doug Moring, Expo, Inc.

Len Murphy, Property Loss Research Bureau

Marianna Pantelin, American College of Chest Physicians

Shaun Ratay, Morgan Stanley

Diana Scott, American Academy of Orthopaedic Surgeons

Karen Seabert, HelmsBriscoe

Steve Sind, Global Event Strategies

Diane Urbanski, American College of Surgeons

Steve Van Hout, American Academy of Sleep Medicine

Aleshia Ward, CEM, American Society of Plastic Surgeons

Forum Plus Members

Jeanie Kennedy, Academy of General Dentistry

Melissa Marx, American Academy of Pediatrics

Nicola Barrett and Sheryl Reyes, American Association of Nurse Anesthetists

Jenny Lara and Evan Summers, American College of Prosthodontists

Julie Von Bergen, American Planning Association

Kelly Butler and Joy Meredith, Association for Corporate Growth

Alvin Burch and Bianca Washington, CCIM Institute

Mollie Gambrell, Brittany Wallace and Alex Waszok, Congress of Neurological Surgeons

Rhonda Grizzard, Ewald Consulting

Cheretta Clerkley, Financial Managers Society

Maria Loiotile, Naser Labadi, Rachel Moore and Olivia Taylor, SmithBucklin

Jessica McEwan and Pamela Phillips, Society for Vascular Surgery



Digital Extra

To access Circuit “20 For 2018,” visit the digital or mobile versions of *FORUM*.

On the Circuit for 2018

“As we enter 2018, it is impossible not to note the growing intensity of political and social dialogue, and the disruptive forces (including technological innovations, and demographic and workforce shifts) that are testing and shaping industries and professions,” writes Matt Sanderson, President & CEO of SmithBucklin, in the introduction of the 2018 edition of *Circuit*, which marks its 15th year of publication.

In *Circuit*, SmithBucklin keys in on 20 trends, issues and developments on which associations should keep a close eye. Below, we’ve highlighted some key takeaways from the publication.

1

The Never-Ending Pursuit of Loyalty:

Loyal customers refer others more frequently. The corollary for associations is clear: By focusing on retaining and building relationships with their most loyal members, they will be better positioned to work with them to acquire new members. Be proactive by asking that dependable base of members to serve as evangelists, perhaps by personally identifying one to two prospects each year to recruit and mentor.

2

The What Versus the Why:

The latest insights from education experts indicate that a focus on “learning” is more impactful than a focus on “training.” Training is more focused on a skillset. It’s focused on a point in time, on a task, or on meeting a specific need. It teaches *what*. Learning is more of a process. It’s ongoing. It involves critical thinking. Learning can be applied to a variety of circumstances. It explores the *why*.

6

Be Prepared for the Unexpected:

“Nearly every event planner has a story of an emergency or crisis that had to be managed through,” says Dave Weil, Vice President of Event Services at SmithBucklin. “Some are more serious than others, obviously, but regardless of the threat posed, it’s the pre-event planning that can matter most during tense and stressful moments.”

7

Content You Can Count On:

With their staggering supply of member knowledge and passion, associations are trusted sources of information brimming with subject matter expertise. By properly leveraging that knowledge and passion, associations can create an unmatched, self-sustaining content model that rivals that of a world-class news organization. This strategy can help them become extraordinary resources of relevant, authoritative information that is not available anywhere else.

11

Balancing Data with Experience and Intuition:

While data is an indispensable tool for associations, there are also other vital components of an effective decision-making process. In this regard, associations can learn from Major League Baseball teams that seek success by relying on both the data provided by advanced statistics and less quantifiable—but extremely powerful—sources of information such as experience and intuition.

Source: SmithBucklin’s 2018 edition of *Circuit* “20 for 2018,”



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