

FORUM



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Getting the Most Out of #GivingTuesday

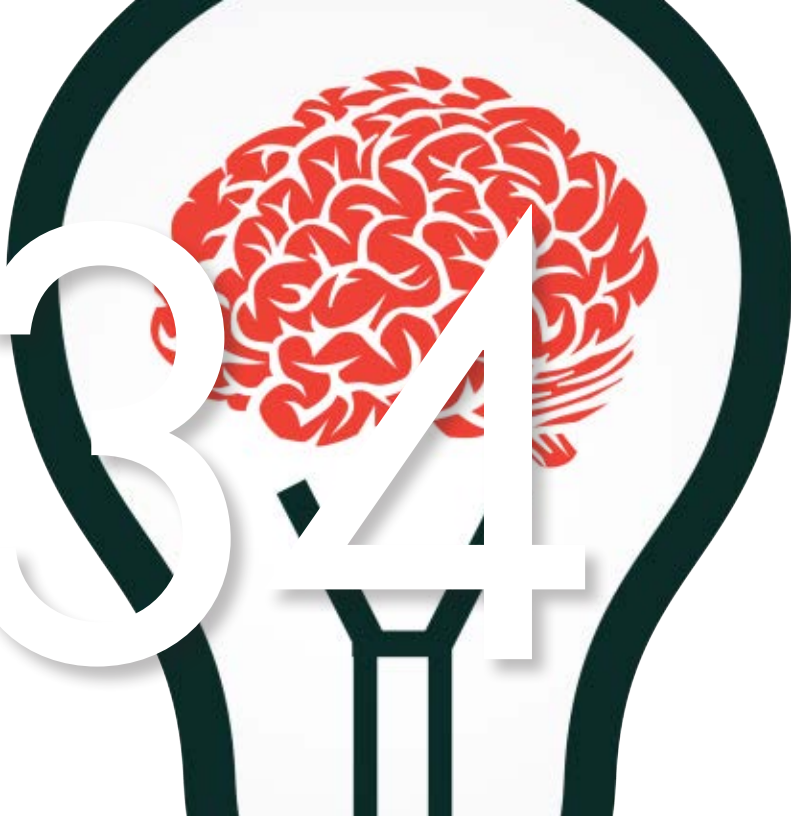
On the heels of Black Friday and Cyber Monday, #GivingTuesday is a global initiative that encourages giving back. For associations on shoestring budget, it may seem daunting to break through the noise and run an effective #GivingTuesday campaign. FORUM spoke with three organizations that had great success with their campaigns about how to approach this once-a-year donation bonanza.

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BIG PICTURE,
ASSOCIATION FOCUS

Is Drama Detouring Your Association from Its Mission?

And the award for Best Drama goes to... uh oh, it's your association! A drama culture can be detrimental to the pursuit of an organization's goals and the productivity of its employees. Drawing on years of experience working with organizations, Jacki and John Davidoff provide a roadmap for identifying, addressing and tackling drama in your workplace culture.



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ASK THE EXPERT

How to Ask Your Boss for Professional Development

"Hi, I'd like some professional development, please and thank you!" Okay, so it isn't as easy as that, but it may not be as difficult as you think. Jennifer Nemkovich, CAE, Chief of Staff and Senior VP of Professional Development at CHEST discusses the work she is doing organizationally and how employees can be proactive in their quest for professional development.

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ASK AROUND

Climbing the Leadership Ladder... But What if There Isn't One?

How can young professionals advance in their career if there isn't much room for upward mobility at their association? Often, the only opportunity for a promotion is the departure of a direct superior, which, at best, results in a desire to leave the association or, at worst, a Game of Thrones-esque clash for power. Hear from four YPs about how organizations can best provide their employees with the opportunity to succeed.

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Dawn Sweeney: The 2018 Woman of Influence

On March 3, 2018, Dawn Sweeney, CEO of the National Restaurant Association, was announced as the inaugural recipient of Association Forum's Woman of Influence Award. The award, presented in conjunction with the Women's Executive Forum, is a recognition of Dawn's exceptional achievements and contributions to the advancement of the association management profession and society.



Michelle Mason,
FASAE, CAE
President and CEO
Association Forum



Dawn Sweeney
CEO
National Restaurant
Association

"I'm honored to accept the 2018 Women's Executive Forum's Woman of Influence Award," said Sweeney. "The nation's association community and its many women leaders have inspired, nurtured and encouraged me through every phase of my career. It's a privilege to receive this inaugural award and to be among the thousands of women who are helping to lead the way for America's professions, trades, businesses and other communities."

"As a trailblazer, Dawn has demonstrated with excellence a proven track record of innovation, impact and paying it forward through coaching, mentoring and service to others," said Association Forum President and CEO, Michelle Mason, FASAE, CAE. "Her exemplary accomplishments over her illustrious career is a beacon of success and a standard of excellence that only a few have or can achieve."

Michelle Mason sat down with Sweeney to discuss influence, success and the next generation of leaders.

MASON: Who was or is the most influential person in your life and why?

Dawn Sweeney: My parents were extremely influential in my life. Both had a remarkable work ethic. My father was a reserved and dependable accountant at a local dairy company, who would come home each night to work on our farm. He also served as a city councilman and mayor of our town. Most important, he taught me about unconditional love. That was a huge blessing. My mother was very outgoing and personable. She also was extremely goal-oriented. She was deeply committed to her family and community and devoted her life to taking care of others, always stepping in and stepping up.

MASON: What lessons have you learned that helped you become who you are today?

DS: I believe that it is important to align your personal values with the industry or profession you choose to represent. Envision greatness for yourself and have belief and confidence in your abilities. I try to "swing for the fences"—I have found that if you step up with the intention to hit a home run, the outcome and your results will be dramatically improved—both professionally and personally.

MASON: How is the influence of women evolving in society?

DS: More women are assuming leadership roles in business. We are mentoring each other and confidently adding our unique perspectives to the workplace. We are showing up and speaking up. In the restaurant industry, which I'm privileged to represent, the ranks of women-owned restaurant businesses have grown 40 percent over the latest five-year Census Bureau study, way outpacing restaurant growth overall. We have more female managers than any other industry. Women are using their vision, knowledge, business sense and compassion to make smart decisions for their companies, employees and themselves. I'm excited about the future and look forward to the day when half (at least!) of all company CEOs are female.

MASON: How do you see the next generation of leaders impacting change?

DS: It is important to develop your own authentic style, figure out who you are and where your guardrails are. The success of the next generation of leaders will depend on their ability to adapt quickly to change, bounce back from dif-

difficulties, and deliver results and solutions with speed and with trust. They'll have to be tough, innovative and strategic, creative and empathetic. And with a willingness to value diversity and collaboration, they'll be able to serve their businesses and customers well.

MASON: How do you decompress or turn-off the "busyness" of life?

DS: It's difficult at times, and requires conscious effort. This is, quite honestly, something I am "working on!" If I allowed it, my job could consume nearly all of my waking hours, but that's not productive for me or anyone else. Spending time with my family is a major priority and I meditate on a regular basis.

MASON: What motivates you to succeed?

DS: It's never really about recognition or presentation. It's about wanting to do what is necessary to make a difference. I love doing business in a mission-oriented organization, where the most rewarding part of the work is the people that make up that industry and the organization. Just as important is to be able to work on a team, to share ideas, knowledge and experience. To me, working together, with a shared goal that is bigger than ourselves, is motivating and often life-changing. It is important to lift each other up, clear the way, remove the obstacles and unite in mission and deed.

MASON: How do you handle adversity?

DS: When problems arise, I try to remain flexible, dependable and reliable, operating from a sense of purpose and service. Throughout my life, I have made sure to pay attention to the experiences that have shaped me. Like everyone, I've had moments of inspiration, regret, breakthrough and heartbreak. All have been important and each has been meaningful. I know my path, personally and professionally, has had and will continue to have unexpected twists, turns and detours. But every day, I choose to be kind, work harder and never, ever give up.

MASON: Why is a personal brand important to advancement?


DS: Developing your personal brand is essential to advancing your career and development as a leader. It also is a big responsibility and requires accountability and thought. It defines you as a leader and helps shape the way in which you will serve others. Your personal brand should represent the value you provide and showcase your achievements, but shouldn't necessarily be self-promoting. The objective, always, is to endeavor to be a role model, mentor and a voice that others can depend on.

MASON: The theme of this year's Women's Executive Forum is Confident, Proud and Fearless. What do these words represent to you?

DS: These are powerful and empowering words. Women—and all people—should be encouraged to celebrate their courage, bravery and decision to live the lives they choose. It is important for us to show the world that we are self-assured confident as much as competent in our abilities.

MASON: If you left a short note of advice or inspiration in a time capsule to be found decades from now, what would it say?

DS: Work hard and be kind.

Dawn Sweeney will be presented the 2018 Woman of Influence Award in a special ceremony on April 26, 2018. 

Planting Seeds at SmartTech 2018

SmartTech | February 1, 2018 | OLC Education and Conference Center

If you work for an association, there is a good chance that your organization is sitting on a tremendous amount of data, whether related to your membership, the industry your association serves or your marketing efforts. Post-event surveys, member demographics, email preferences—these all represent important data points that can be used to improve your operational efficiency and the relevancy of your organization to your members.



Of course, having the data is one thing. For the 100-plus association professionals and supplier partners who attended the first annual SmartTech Conference in February, the question was: “So, what the heck do we do with it?”

Held at the OLC Education and Conference Center in Rosemont, IL, the inaugural SmartTech Conference was a one-day, technology-focused meeting custom-built for small and mid-size associations looking to utilize technology to build a functional and productive data strategy. The presenters, from the keynotes to the breakouts to

the closing panel, sought to help attendees answer their questions about what it means to have a successful data strategy and, more important, how to implement one, especially for associations without the resources to hire dedicated data analysts.

In the breakout Association Leaders and the Analytical Mindset, Debbie King, Founder of Association Analytics quoted an old proverb: “The best time to plant a tree is 20 years ago. The second-best time is today.” Luckily for those who didn’t plant that tree in 1998, the seedlings from which your data strategy will grow are likely already sown in your organization, waiting to bloom. The next step in the journey toward a working data strategy is arranging and analyzing that data in a meaningful way.

Jodie Slaughter, FASAE, Founder and President of McKinley Advisors, defined the goal of a data strategy as the “ability to unlock new insights and inform key decisions through an integrated, real-time view of the key demographic, perceptual, transactional and financial data.”

The opening keynote at SmartTech was delivered by Reggie Henry, CAE, the Chief Information Officer for the American Society of Association Executives. He addressed the importance of technology as a driver of business growth, including internal applications, such as telecommuting, and as a propellant for member-facing initiatives.

A key takeaway from the conference was that

a successful data strategy isn't about breaking down each member into a statistic. In fact, it's the opposite. By accumulating and analyzing data on your members, organizations can glean important information on the individuals who make up their membership. You may have two members—both millennials, both active participants in your events, and both actively pursuing their CAE—but one is a coordinator and one is a Vice President. Understanding how to segment these unique audiences allows you to deliver value and boost your members' trust in your organization's ability to deliver relevant content and benefits.

The second annual SmartTech Conference will be held in early 2019.



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What A Year It Has Been

The 2017 Bree Anne Sutherland Scholar Reflects on His Experience.

Last year, the Association Forum Foundation introduced the Bree Anne Sutherland Scholarship, named in memoriam of Association Forum's former Director of Learning. The scholarship provides one year of unlimited access to education offerings to a young professional. The recipient is also paired with a mentor from association industry. The inaugural Bree Anne Sutherland Scholar was Cody Czymr.



Cody Czymr
*Director of
 Communications
 and Membership
 Michigan Shores Club*

The people I've met, the education I've received and the experiences I've encountered are more than I could have imagined. In March of 2017, when I learned that I received the Bree Anne Sutherland Scholarship, I knew it would be a good opportunity for learning and development. What I didn't know is that the scholarship would provide opportunities to build lasting relationships, to lead a charge to better young professionals and to really make a name for myself.

Looking back over the past year, I've accomplished a lot. Through the classes, workshops, conferences and more, I was able to build quite the Association Forum resume. It got to a point where I was joking that they needed to set up a desk for me in the office because I was there so often. But ultimately, that was the goal—to immerse myself in the education provided by Association Forum. The goal was to gain the knowledge and understanding of an association professional and to live up to the legacy that Bree Anne Sutherland had created.

With those goals in mind, I dove in. As I look back at my experience over the past year, the numbers reflected just that. In total, I participated in just shy of \$2,000.00 worth of Association Forum programming. That equates to:

- 44 CAE credits
- 15+ meetings and programs
- Hundreds of professional connections

I made a conscious effort to attend as often as I could, while still maintaining my workload. While it is up to the recipient of the Bree Anne Sutherland Scholarship to make the most of the experience over the year, I am lucky to have had the support of my employer and the Association Forum staff. The support I received was tremendous and encouraging.

The scholarship provided a lot of firsts for me:

My first Forum Forward. My first Holiday Showcase. My first Honors Gala. These were all experiences that I thoroughly enjoyed and expect to repeat in the years to come. It was an amazing feeling to walk around these events and have people I had never met come up and congratulate me for receiving the scholarship. Everyone was so gracious, so welcoming. I think that speaks to association professionals in general. We are passionate people who care about the work we do. We care about the successes of our colleagues. We care about future generations excelling and bringing the industry forward. During the year, I met some wonderful strangers who quickly become friends and mentors.

I was lucky to have Dave Bergeson, past-chair of the Association Forum Board of Directors, serve as my mentor though this experience. If you know Dave, you know that his resume is large and his knowledge is endless. Dave and I met several times throughout the year for check-ins and updates. He was always so kind with his advice and insight and I am truly thankful for the wisdom he provided. During this experience, I realized how important it is to have a mentor in your life who you can bounce ideas off of, go to for guidance on career trajectory and provide a non-bias support system to work through challenges. The scholarship provided me with this opportunity, and I will forever be grateful.

The first education event I was able to attend with the scholarship was Association 101. Through the class, I was able to get a full understanding about associations as an industry and meet other "newbies" as we traversed the first few years of the industry together. It provided me with a great deal of insight and knowledge. The experience came full circle at Holiday Showcase, when one of my fellow Association 101 attendees came up to me and re-introduced herself. We had met seven months prior when we attended the class together and now we

bonded over being back together to end the year.

The Bree Ann Sutherland Scholarship provided me an opportunity to hear some wonderful and well accomplished speakers, including pioneers for change, leaders amongst peers and advocates for diversity. Having the luxury to attend any and all Association Forum education events enabled me to hear from association professionals who provided wonderful industry experience, but I was also able to hear from speakers of diverse backgrounds whose inspirational stories helped motivate me to be the best me that I can be. At Holiday Showcase, Robyn Benincasa's inspiring story of overcoming adversity and pushing herself to the limit inspired me tremendously. It is a story I will remember for a long time.

The most impactful opportunity that I had with the scholarship was the development of Association Forum's Emerging Leaders Academy. I was selected to participate in a day-long workshop and brainstorming session with 25 other young professionals to help develop an accelerated program for emerging leaders in the association industry. In collaboration with Donna Brighton, we worked to build the foundation of a program, and I was charged with co-leading the task force to bring the program to fruition.

During this experience, I was able to create and implement a business plan—an opportunity I would not have otherwise had. The Association Forum Board of Directors and Leadership Team looked to me to lead the charge, along with Moe Malek and Courtney Walsh, to create and implement an

impactful curriculum for emerging leaders in the industry to gain education they might not be able to find elsewhere. I am happy to say the program will be launching in April, and I am thrilled for the future of associations.

Overall, I am completely indebted to the Association Forum for providing me with this wonderful experience. I can't say it enough, but this opportunity exceeded all of my expectations. The people you will meet through Association Forum, the education you will receive and the growth you will make as a professional will surpass your expectations. I am honored to have been able to continue the legacy of Bree Ann Sutherland as the first recipient of the scholarship. I see wonderful things on the horizon for Association Forum, the association industry and for myself. I am excited to see who the scholarship will go to next, and my hope is that they take full advantage of the opportunity.

Keep doing great things. 📸



Foresight as a Practice

By Dan Shea

How Can a Futurist Help Your Organization in The Present?

Thinking strategically about the future is a concept so ingrained in the continued success of an organization that for some CEOs, it has become second nature. These days, innovation and technological advancement progresses so exponentially that concentrating solely on success in the short term is practically a failure of management. Of course, if you spend too much time and energy on long-term strategies, you may miss the disruptions already knocking at your door. So, how do you balance those commitments? The solution might come in the form of a futurist.

What exactly is a futurist? If that job title sounds like something out of a science fiction novel, you're not entirely off-base. Sci-fi authors such as Robert Heinlein, Isaac Asimov and H.G. Wells were all considered futurists, or futurologists, in their time. Even today, the most recognizable futurists work in science and technology: Dr. Michio Kaku, a theoretical physicist who ponders concepts such as supergravity and quantum field theory; or Dr. Ray Kurzweil, whose predictions in the early 1990s of the future of the internet have come true with stunning accuracy.

However, pigeonholing a futurist as a wild-eyed predictor of technological advances is a bit of a misnomer and even a disservice to their importance. They aren't psychics, clairvoyants or three-eyed ravens by any means, but futurists are used across a wide swath of industries to analyze trends and make recommendations to help businesses and communities adapt. They advise on strategy and provide guidance on innovation.

"What a futurist brings is long-term thinking, and how you then bring that back to change decisions that you're making today. If you don't think in terms of foresight or futures, you usually just think that tomorrow is a lot like today, only bigger, better, faster," says Cindy Frewen, FAIA, Chair of the Association of Professional Futurists (APF). "The way futurists think is about opening minds and challenging existing assumptions about what the future's going to be."

Frewen is an architect and urban futurist.

She consults with cities and organizations on long-term planning and designing for the future. Anyone who has walked through Chicago's public lakefront or skipped traffic by cutting through Lower Wacker has seen benefit of long-term city planning in the form of Daniel Burnham's famous Plan For Chicago.

"If you look at it in the simplest way, it's sort of a warding off of becoming obsolete," Frewen says of a futurist's role to an organization. "It's the prevent defense. That would be the more conservative view. That's the contingency sort of thinking. On the positive side, it's also thinking about where you want to be."

When the leadership at Corporate Housing Providers Association (CHPA) started looking towards the future, they decided to take the leap and contract a futurist. We spoke with Mary Ann Passi, CAE, CEO of CHPA, about how associations could approach the future, adapting to the next wave of members and the ever-changing roles of the industry.

What led to your decision to work with a futurist? What do you hope to accomplish?

Passi: CHPA leaders realized that their industry is quickly changing. There is a lot of media attention on the alternative lodging sector, and we needed to critically review how these changes might affect our members now and in the future. As entrepreneurs, our members need to know what's coming tomorrow in to be successful today. A futurist is an invaluable tool to identify



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“What a futurist brings is long-term thinking, and how you then bring that back to change decisions that you’re making today. If you don’t think in terms of foresight or futures, you usually just think that tomorrow is a lot like today, only bigger, better, faster.”

critical trends and the potential impact on member companies. We are finalizing the details to work with our chosen futurist to:

- Identify and advise major trends that will impact the corporate housing industry, profession and careers over the next 3-5 years.
- Analyze the sharing and global economy to prepare member companies to thrive in this competitive environment.
- Advise CHPA on how to better support members as impactful trends arise.
- Develop “trending” keynote session for the CHPA Annual Conference, advising on critical areas for member focus.

What do you see on the horizon for associations? How has the industry changed over your time in associations and how do you see things changing in the future? What role do you see associations playing in the future that is different than today (or do you expect the role to remain the same?)

Passi: Associations must be nimble and able to respond to changing member needs. Members are under pressure to navigate and adapt to trends, and we must be able to successfully support them.

Associations will be relied on to become even more of a filter for media and communications. Messages are coming at everyone all day, every day, and it’s our role to help make sense of this information and how it affects our members. As important as that is for us to do today, I believe it will become even more important in the future.

Associations as we traditionally think of them will change. Just as society changes the way we communicate and connect with each other, so associations will need to change to continue suc-

cessfully serving our members. Globally, the concept of associations is not standardized. In some cultures, this concept is either unknown or does not resonate. To survive and thrive, associations must be able to connect with these prospective members to give them what they need, when they need it.

Membership engagement and retention seem to be the biggest priorities for associations today. What is the CHPA doing to connect with members and bolster retention rates?

Passi: CHPA looked critically at what we offered our members. We retired a few programs that outlived their usefulness and focused resources on programs/services that showcase members’ professionalism and credibility. Giving our members the ability to differentiate themselves is one of the most important opportunities we provide.

Our current strategic plan is very “outward” focused on items that members find critical to remaining competitive in the industry. The goal areas are:

- Industry Evolution—helping members understand how the industry continually evolves, with the resources to help them navigate it.
- Industry Engagement—how members engage with other stakeholders critical to their success; proactively identifying opportunities for outside stakeholders to engage with the association; collecting data on member companies to provide insights; proactively providing opportunities for member involvement
- Industry Competitive Position—helping members understand the overall marketplace in which they operate and our industry’s sector within it. Our goal is to aggressively market the industry and differentiate the pros of


working with a professional corporate housing provider. We recently produced a commercial and series of videos that are available for member use. We are working to create tools that they would not independently be able to develop that help deliver association messages.

- CHPA's Competitive Advantage—critically studying other organizations that vie for our members' resources – and dollars. We are proactively strategizing how CHPA interacts with these other organizations to position members for success through stronger relationships, collaborative efforts and new partnerships.

Just as associations are starting to figure out Millennials, we now have Generation Z entering

the workforce. How are you planning to appeal to this next generation of potential members?

Passi: Regardless of generation, people want to connect with other people that get what they do and how they do it. Creating that sense of community within associations is critical to continued success. I work with a very talented and knowledgeable group of Millennials and GenZers. While I understand the perception of a division, I've not experienced that the needs are vastly different. How they access what we provide morphs and evolves. In my experience, connecting people remains vitally important.

Being informed and aware of the changing trends—being able to 'filter' all the noise for our members—that's how we plan to appeal to this next generation of potential members. 



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Interns and Volunteers Under the FLSA

This Law Review was written by Rachel Steiner and edited by Jed Mandel. Rachel is a senior attorney and Jed is a founding member of Chicago Law Partners, LLC. CLP serves as the Association Forum's general counsel.



Q: We heard that the rules that apply to unpaid interns have changed. Can we still offer unpaid internships?

A: Yes, as long as the work the association assigns to interns focuses on their educational development rather than the association's business needs.

The federal Fair Labor Standards Act (FLSA) requires employers to pay covered employees minimum wages and overtime pay. To the extent workers qualify as interns, employers need not pay them in accordance with the FLSA requirements. It is important to remember, however, that simply calling someone an intern is not enough. What matters are the circumstances under which the work is performed.

The United States Department of Labor (DOL) implements rules to enforce the FLSA's wage and hour requirements. Among other things, those rules (i) require the examination of multiple factors to categorize a worker as an "intern" (as opposed to an "employee") and (ii) exclude workers classified as interns from the FLSA's requirements. Over the past few years, various courts have issued decisions rejecting the DOL rules adopted during the Obama Administration on when interns constitute employees under the FLSA. In January 2018, the DOL decided to "eliminate unnecessary confusion" between its rules and the courts' rulings and adopted the courts' approach. To that end, the DOL has issued revised guidelines

for classifying workers as interns not entitled to FLSA protections.

Under the newly-adopted approach, the DOL relies on a case-specific test (known as "the primary beneficiary test") to determine whether an individual worker qualifies as an employee or an unpaid intern. The primary beneficiary test focuses on the economic reality of the parties' relationship, specifically the extent to which:

1. The parties understand that there is no expectation of compensation;
2. The internship provides training similar to an educational environment;
3. The internship is connected with a formal educational program, including course-work or academic credit;
4. The internship accommodates academic commitments by corresponding to the academic calendar;
5. The duration of the internship is limited to a period of time to provide beneficial learning;
6. The intern's work complements (not displaces) paid employees' work and provides the intern with significant educational benefits; and
7. The parties understand that there is no entitlement to a paid job when the internship ends.

The inquiry emphasizes that the true purpose of the internship must be to educate the intern. Overall, the more an internship appears to benefit the employer instead of the intern, the less likely the DOL


will consider the relationship to be a proper internship. As such, an unpaid internship program must facilitate the intern's learning experience, not merely advance the association's business purposes. If, in practice, the internship program is nothing more than a source of free labor to complete essential activities, the DOL likely would consider those "interns" to be employees, who must be paid under the FLSA.

In addition to its interns, some not-for-profits' volunteers may be exempt from the requirements of the FLSA. Specifically, the DOL recognizes an exception for individuals who volunteer their time to not-for-profit organizations for religious, charitable, civic, or humanitarian purposes. Generally, the DOL considers individuals to be volunteers if they:

1. Volunteer freely for public service, religious, or humanitarian objectives;
2. Volunteer without contemplating or receiving compensation;
3. Serve on a part-time basis;
4. Do not displace regular employees or perform work that regular employees otherwise would perform; and
5. Do not volunteer to provide the same type of service that they otherwise are employed to provide.

In contrast to an intern, a volunteer may engage in work expressly and solely to further the association's needs. While no expectation of compensation is an important factor to be considered in properly clas-

sifying a worker as a volunteer, the DOL regulations do permit volunteers to be paid expenses, reasonable benefits, a nominal fee or any combination thereof without losing volunteer status. The DOL allows such nominal payments or "stipends" as a means to cover the out-of-pocket costs of volunteering, not as a form of compensation. Such stipends cannot exceed 20% of what the organization would be required to pay an employee for the service and cannot be tied to productivity or hours worked.

Before using the services of an individual on an "unpaid" basis, either as an intern or a volunteer, it is important to evaluate the true nature of the proposed working relationship. Improperly classifying employees as interns or volunteers (and thus failing to pay them in violation of the FLSA) exposes an association to legal liability, including money damages, attorneys' fees, and civil penalties under the FLSA (as well as any available remedies under applicable state and local wage and hour requirements). 

The answers provided here should not be construed as legal advice or a legal opinion. Consult a lawyer concerning your specific situation or legal questions.

As part of our efforts to provide a Welcoming Environment™ for our members, we are providing a copy of our Core Values translated into Spanish by Interpro Translation Solutions, Inc.

Be A Welcoming Environment

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

Embrace Innovation and Quality

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

Have Fun and Stay Positive

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

Open and Honest Communication and Teamwork

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

Accountability—Own It

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

Win with Integrity

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

Como parte de nuestros esfuerzos por brindar un Welcoming Environment™ a nuestros miembros, le proporcionamos una copia de nuestros Valores Fundamentales traducidos al español por Interpro Translation Solutions, Inc.

Ser un entorno acogedor

Ofrecemos un entorno acogedor que busca mejorar a la comunidad en general de forma activa, al reconocer que un todo es más que la suma de sus partes. Haremos que todos los que interactúen con nosotros se sientan bienvenidos, representados, involucrados, inspirados y empoderados.

Adoptar la innovación y calidad

Nos encanta probar nuevas ideas y buscamos inspiración dentro y fuera de la asociación comunitaria; valoramos las mejoras, tanto grandes como pequeñas. Alentamos y celebramos la experimentación relacionada con los adelantos; sin embargo, sabemos cuándo suspenderla. Nuestro objetivo es mejorar continuamente.

Diviértase y mantenga una actitud positiva

Está comprobado que generalmente usted pasa más tiempo con sus compañeros de trabajo que con su propia familia. Nos esforzamos por lograr que nuestro entorno de trabajo sea divertido, positivo y en general un excelente lugar para trabajar.

Comunicación franca y honesta, y trabajo en equipo

¡Uno no sabe lo que no sabe! La comunicación efectiva es clave. Promoveremos un entorno en el que hablemos de manera franca y honesta, con el objetivo de construir un mejor equipo. Incorporamos la franqueza de manera constructiva. Trabajaremos conjuntamente, a fin de generar valor para los miembros.

Asuma la responsabilidad

Asumimos mutuamente la responsabilidad y esperamos que las personas hagan preguntas y planteen inquietudes de manera respetuosa. Dado que el trabajo requiere de equipos y colaboración interdependientes, confiaremos y dependeremos los unos de los otros para ser receptivos y generar valor y servicios de calidad para los grupos de interés.

Triunfe con integridad

Operamos de manera ética, aportando nuestro tiempo, talentos y conocimientos para avanzar en las comunidades donde trabajamos y vivimos. Nos comprometemos a desarrollar nuestra asociación de maneras que benefician al entorno y a la sociedad.

You Know About the GDPR. Now What?

By now, most of you have likely heard about the General Data Protection Regulation, (known simply as 'GDPR') that will come into full force and effect on May 25, 2018.

By **Terrance Barkan, CAE**



Terrance Barkan,
CAE

Founder and
Chief Strategist
GLOBALSTRAT, LLC

The GDPR is the most restrictive data protection law in the world. It will apply to any organization, including associations, that maintains data for even just one European Union (EU) based individual.

Understanding what the GDPR is and that it probably applies to your organization is just a very preliminary step.

Now What?

The association community needs some frank discussion about what can seem to be a hugely complicated and daunting exercise, namely;

"How do I make sure that my association is compliant with this 88-page regulation so that I avoid potentially massive fines?"

This is especially challenging for smaller associations that do not have massive resources like an in-house legal team or a large IT department.

So here is a frank perspective on the GDPR that you probably will not hear anywhere else;*

1. **Perspective.** The GDPR is a ridiculous law from the perspective of a relatively small organization because it was designed to impose massive penalties on large companies that abuse and misuse the data they hold/sell/trade on individuals. Think Facebook and Google. The regulation assumes that organizations will have the internal resources to apply sophisticated data management practices and the ability to respond promptly to potential data breaches or requests from your data subjects.
2. **Risk.** Most associations are not risky businesses from the perspective of data protection practices. For the most part associations

hold data on people who want to do business with them or who have freely supplied their data. Most associations also do not usually hold highly sensitive data on their members or contacts. Associations also usually enjoy a positive reputation within their communities, unlike some other types of businesses (banks, credit agencies, catalog companies, etc.).

For these reasons, associations are going to be less likely than other types of organizations to suffer from a data subject making a claim to a European Data Protection Authority against your organization.

3. **Penalties.** Despite the low probability of having a claim brought against your organization, the level of the potential penalties is so high that no organization can afford to ignore the risk. There are a range of corrective measures that the authorities can take against an organization that is deemed to have violated the regulations that can go as high as €20,000,000 (about \$24 million) or in the case of an undertaking, up to 4 percent of the total worldwide annual turnover of the preceding financial year for the most severe forms of a breach.

Imagine that you are walking across a large field that contains a single landmine. The chances that you would be unfortunate enough to make that one wrong step and actually step on the mine are quite low. However, the consequences would be quite severe. That is the GDPR.

4. **The IT Department.** The GDPR regulations are NOT a technology problem, they are a risk management and a business process problem.

Many organizations (including IT consultants and vendors) mistakenly jump to the conclusion that the GDPR is an IT department problem and will require an approach similar to PCI compliance. This is only partly true.

The real issue is understanding what data you are collecting, why you are collecting it and how you manage its use and distribution from a business operations perspective. The GDPR is also a legal compliance issue and requires your legal counsel, whether in-house or retained, to understand how to craft agreements, policies and language that will protect your organization.

- 5. Gap Assessment.** So how does your organization make the shift from just understanding what the GDPR is, to how you achieve compliance? The critical next step is to objectively understand where you have exposure and risk by conducting a Gap Assessment.

While there are some examples of self-assessment tools being shared in the association community, these are no substitute for a qualified third-party evaluation.

The purpose of a facilitated Gap Assessment is to gain a vetted checklist of areas that may need correction or changes in your processes. For example, it may show that you do not have a data protection policy or that there are no guidelines about data retention.

- 6. What's the Fix?** The benefit of a Gap Assessment is to gain a clear overview of your overall risk exposure. Once you have your assessment, the solutions will fall into one of three buckets:
- a.) a technology fix—changes may be needed on how you obtain consent or the types of data you make available publicly across your different applications.
 - b.) a legal fix—you may need new terms and conditions, internal policies or changes in your vendor contracts.
 - c.) a management/process fix—you may determine there are types of data you no longer need or want to collect, you may require additional staff training or you

may change your data acquisition practices.

Remember, you can only identify a solution once you have correctly identified the problem. Be careful not to jump to solutions before you have evaluated the actual problem.

- 7. Risk Appetite.** Once you have your Gap Assessment (a checklist for everything that needs to be corrected to be in compliance), an association will have to decide how many resources they will apply to fix some or all of the gaps.

Note: As stated at the beginning, this law is written to penalize large companies. Some organizations are not going to have the resources needed to be fully compliant. That means some associations will have to decide which risks they can, or have to, live with.

The important point here is that your organization makes a good faith effort to comply to the fullest extent possible given the resources available and that you take measures to reduce your risk exposure in the first place.

**Read this GDPR Briefing Paper
for more information:**

<http://bit.ly/AboutGDPR>

**You can also download the actual
GDPR law as published by the EU:**

http://ec.europa.eu/justice/data-protection/reform/files/regulation_oj_en.pdf

“Imagine that you are walking across a large field that contains a single landmine. The chances that you would be unfortunate enough to make that one wrong step and actually step on the mine are quite low. However, the consequences would be quite severe. That is the GDPR.”

- 8. Not My Problem.** Any IT vendor who tells you GDPR is not their problem is a fool. If they process data for you and you hold data on an EU resident, that vendor needs to be compliant. Not for their sake but for yours. If you are the data controller and they screw up, who do you think is on the hook?


If anything, IT vendor companies have at least as large a stake in this issue as do the associations, since the vendors are likely going to need to satisfy GDPR compliance requirements of multiple customers.

- 9. Opportunity or Burden?** I suggest that associations look at this whole GDPR exercise as an opportunity to improve your data protection and management practices. More than that, it is an opportunity to show your members that you are being proactive and responsible stewards of the data you hold on your members. In other words, this is an opportunity to create a positive message for your brand and for your members, instead of just being a burden that you must bear.

One other important aspect to consider is that data protection laws in other countries are also under review, many of which are looking to the GDPR as a model. By complying with the most stringent requirements in the world, you are better positioned to future proof your organization.

- 10. Time is of the Essence.** As the implementation date draws closer, more and more associations are going to chase scarce resources for advice and help. This will create the risk that some associations are either taken advantage of by unscrupulous actors, or that they simply will not have access to the support they need to get compliant.

As with any major project, it can easily take longer than expected. To meet the May 25, 2018 deadline, acting sooner is better than later.

I hope that this information helps put the GDPR issue into perspective and gives some context for those who are trying to navigate the GDPR minefield. 

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#GivingTuesday



Getting the Most Out of Your Campaign

By **Teresa Brinati**



If you haven't implemented a #GivingTuesday campaign, what's holding you back?

Since 2012, #GivingTuesday has been celebrated the Tuesday following Thanksgiving—on the heels of manic Black Friday and Cyber Monday shopping events—as a day to give back. Maybe you’re skeptical about the potential effectiveness of such a campaign given the size of your association and the thousands of other organizations asking for donations on the same day. Or you’re concerned that your association doesn’t have the time or staff to run such a campaign. Fair enough.

Still, #GivingTuesday can be a productive, low-barrier fundraising strategy for your greater development goals. Here are some pointers from three organizations of different sizes and resources that have seized the day.

Running a Campaign on a Shoestring

For the past two years, the Chicago-based Society of American Archivists has done a #GivingTuesday campaign on shoestring resources. With a membership of 6,200 and no dedicated fundraising staff among its dozen employees, SAA relies on its communications duo to run the campaign. From 2016 to 2017, SAA saw a 32 percent increase in donors and a 5.03 percent increase in funds raised—nearly \$6,000.

“On the surface it may not seem like a lot, but half of that increase in donors came from folks who had never given before,” said Executive Director Nancy Beaumont. “We’re delighted that #GivingTuesday has encouraged participation by new donors.”

SAA uses a multi-channel approach: social media (of course!) and email blasts. Further, #GivingTuesday segues to the organization’s annual appeal, so printed letters follow the campaign.

Branding the campaign is essential. SAA worked with a freelance designer for the 2016 campaign, so there was an initial cost in creating graphics for the website, social media, and emails. These graphics were tweaked slightly in 2017.

In terms of frequency of communications, SAA sent out five emails via MailChimp: one the week prior to #GivingTuesday, one the day before, two

on the day of the campaign (one in the morning at 7am and one in the evening at 6pm), and one the day after, thanking those who gave. Email communications are “signed” by members of the SAA Foundation Board.

Within the emails, SAA used quotes from past donors and respected leaders who share why they’ve donated and how the fund benefits the profession. The messaging was adapted for social media with graphics added to make it more shareable.

The campaign also leaned on a few generous donors ahead of the event to assist in generating momentum across that day. A “Power Lunch Challenge” (from 11:00 a.m. to 1:00 p.m. CT) and “Rush Hour Challenge” (5:00 p.m. to 7:00 p.m. CT) had Foundation Board members pledge to match up to \$1,000 in donations given during those times, which helped create an urgency and energy around giving.

This year SAA tried something different. A month prior to the campaign, SAA had the Foundation Board do a “Twitter Takeover” for a day. They submitted photos of themselves as well as reasons why they served on the Board and what they hope to put the funds toward, which was adapted for Facebook and Twitter posts. A Q&A Twitter chat over the lunch hour gave members the opportunity to learn more about what the Foundation does and interact with the board without the pressure of being asked to give. The Twitter Takeover helped to raise awareness that the Foundation existed and personalize the board so that when SAA did ask for donations, members were more familiar with who exactly was asking them.

An Orchestrated Approach

The 175 employees of the American Academy of Dermatology (AAD) in Rosemont, IL, support a membership of more than 19,000 physicians worldwide. AAD has participated in #GivingTuesday for the past four years, with new tactics and greater success each year, according to Valerie Thompson, Senior Manager Community, Corporate and Philanthropic Relations. This year AAD exceeded expectations by 24 percent when it raised \$65,985, including \$20,000 in matching gifts.

“We also use the campaign to bring in end-of-year donors a bit sooner so that we can focus on others in the last few weeks of the year,” Thompson added.

AAD’s communications plan runs for six weeks (November 1 to December 15) and focuses on email, social media, and personal outreach with donors (i.e., phone calls and personal emails). It starts with “Save the Date,” “#GivingTuesday is coming,” and “Matching Gift Opportunity” type messages and includes articles in its eNewsletter about the event and the matching gift opportunity available. On #GivingTuesday, AAD sends email messages at 8:00 a.m. and 3:00 p.m. CT, and social media posts at scattered times throughout the day (two to three Facebook posts and seven Tweets).

Expressing appreciation—even to those who did not participate—is paramount to AAD. On Thank You Wednesday, it dispatches separate messages to those who gave and those who did not. At one week and two weeks after #GivingTuesday, follow-up messages are sent to those same audiences.

AAD segments its audience into six groups. For email and social media, AAD uses a general entreaty. Its eNews messages come from matching gift donors and a medical director associated with the program being highlighted (e.g., AAD Camp Discovery). Additional matching gift opportunity messages are communicated by portfolio managers. AAD also has about 30 #GivingTuesday Ambassadors—members who agreed in advance to share AAD’s messages with others and ask them to give.

“Matching gifts have been very beneficial to our campaign over the past four years,” Thompson noted. “One of our segments consistently lags behind in performance. Next year we are considering focusing on a different program for that group.”

Learning from Outside the Field

Boston’s Dana-Farber Cancer Institute, supported by the Jimmy Fund, has an enviable development program that raises more than \$220 million per year—stratospheric by association standards!

“The Jimmy Fund is the name of our pediatric cancer clinic in the hospital, and also the name of the fundraising arm to the Institute as a whole,” said Shannon O’Malley of the Principal and Major Gifts Team. “It’s the fun name that makes people in New England want to give to fight cancer.”

#GivingTuesday is an important element in its development portfolio. This year’s campaign had a goal of \$1 million and raised almost \$1.1 million, according to O’Malley. Success is measured not only in revenue, repeat donors, and new donors gained. “We also look at the geographical location of our donors,” O’Malley added. “We want to expand our brand beyond New England.”

The communication plan consists of social media posts on Instagram, Facebook, and Twitter along with blast emails. The only printed material is acknowledgement letters. The first email hits the Tuesday before #GivingTuesday at 8:00 a.m. ET, so it’s at the top of recipients’ inboxes.

“The subject line for all emails is crucial, especially since most people initially read them on their smart phones,” O’Malley said. “It can’t be too long or people will delete it.” To grab attention, subject lines typically start with “Help End Cancer,” which has the added benefit of pulling on heartstrings.


In addition to a compelling mission, the Jimmy Fund also has friends in high places, especially among the city’s elite professional sports teams. The chairman of the Jimmy Fund is Lawrence (Larry) Lucchino, the former president and CEO of the Boston Red Sox, who is also a former patient and major donor. He “speaks” in many of the social media posts for #GivingTuesday. Pediatric cancer patients and their caregivers as well as adult patients are featured in the emails with pictures and quotes. Matching gifts have also proven very successful.

“Okay, so maybe your organization doesn’t fight cancer. Does it still have a chance to be heard on #GivingTuesday? Of course it does—so long as your message is relatable to your audience, advised O’Malley.”

Pulling Strings

Okay, so maybe your organization doesn’t fight cancer. Does it still have a chance to be heard on #GivingTuesday? Of course it does—so long as your message is relatable to your audience, advised O’Malley.

For example, when she worked at Mercy Home for Boys and Girls in Chicago, staff would identify a problem and a solution to that issue in a concise way: “Mary was sleeping outside during a Chicago winter, but thanks to your support she now has a roof over her head,” O’Malley shared. “Again, it’s very helpful to pull on the heartstrings and create a relatable message—everyone can identify with a cold Chicago winter!”

Although you may not be able to pull on heartstrings, it’s the purse strings that really matter! No matter the size of your association’s membership—or whether you raise a few thousand dollars, tens of thousands, or a cool million—a #GivingTuesday campaign is sure to boost your organization’s fundraising goals. 

Teresa Brinati is the Director of Publishing of the Society of American Archivists and may be reached at tbrinati@archivists.org.



**# Giving
Tuesday**

Congratulations to the new class of Association Forum Member CAEs!

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A close-up of a white, cracked mask with a red interior, set against a red background. The mask has a wide, open mouth and a large, dark eye area. The cracks are visible across the entire surface of the mask.

Is Drama Detouring Your Association from Its Mission?

By **John** and **Jacki Davidoff**



Last Friday, the board of directors of a prominent organization received a presentation by its law firm following an investigation of employee complaints regarding the organization's culture. At the report's conclusion, the CEO resigned, effective immediately—the latest in a string of top executive resignations. Just after those events, we received a phone call from a member of the organization's executive committee. “How should we ‘message’ the situation?” they asked us, explaining that the party line was that the CEO resigned “to spend more time with his family.”

“We just stopped trusting you,” we replied. We knew this would likely upset the prospective client. But we didn't want to be party to the drama coming through the phone line loud and clear.

Several red flags made the drama obvious:

- Turnover of multiple CEOs
- Complaints from employees about the culture, serious enough to warrant a legal investigation
- Board choice to misrepresent CEO resignation as unrelated to legal investigation
- Interpretation of situation as a “messaging” problem rather than symptom of a drama culture with low integrity and accountability

There are short- and long-term consequences of failing to recognize drama in your association. These consequences can lead to significant damage to the organization's reputation with current and prospective employees, members, board members, donors, funders, the media, volunteers, and government representatives. As important, internal drama becomes a dominant focus, distracting the organization from its mission and service to its stakeholders.

While the organization described above is an obvious example of what we call a “destructive drama culture,” the symptoms often take much subtler form, such as employees, teams or departments within associations who relate to each other through blame, competition for resources, denial of responsibility, and avoidance of resolving problems.

This article is about identifying destructive drama cultures and how to address such situations before more damage is done. We will define such

drama cultures, explain why associations may be more prone to them now than in the past, and present five types of such cultures. We will also offer tips for tackling destructive drama in your association, helping to move the organization from Mission-Challenged to Mission-Driven.

How Drama Detours

Dr. Judith Wright, executive coach and professor of emotional intelligence at the Wright Graduate University for the Realization of Human Potential, suggests that people could well spend more than 90 percent of their waking hours in some form of drama. The challenge for organizational leaders and their employees is to create a culture with high self-awareness—emotional intelligence—such that they're aware of the tendency toward drama dynamics. These association executives seek to notice drama (their own and others') and develop the skills to shift out of it, shaping a culture that brings relief to and motivates teams and individuals.

The idea is not to eliminate drama. That's not possible. But certain types of unchecked drama, such as the CEO-resignation situation noted at the opening of the article, can impede organizations from fulfilling their missions. This kind of drama diminishes morale and leads to low-performing teams and disengaged staff at every level. In such cases, relationships with internal and external stakeholders are vulnerable to short- or long-term setbacks and disruption.

“There are short- and long-term consequences of failing to recognize drama in your association. These consequences can lead to significant damage to the organization’s reputation with current and prospective employees, members, board members, donors, funders, the media, volunteers, and government representatives.”

What Is a Drama Culture?

Drama describes conflictual and unproductive interactions among two or more people. A destructive drama culture—or “drama culture,” for short—is an organizational culture marked by unacknowledged, pervasive drama.

It’s important to recognize that most any human interaction will have some elements of drama, and that’s not a bad thing. You, the reader, are likely in some degree of drama right now! Organizations are especially prone to drama, given the large number of interactions they involve, often with high stakes. But there’s drama and then there’s drama.

In our research on what defines a *mission-driven* organization, a drama culture will invariably illuminate where an organization is *mission-challenged*. We’re talking about cultures that are chronically, negatively dramatic, with unhealthy implications for their mission and stakeholders. The costs of this include poor functioning, low morale, high turnover and low outcome-effectiveness.

We have found the “drama triangle” a useful framework for understanding the origination and operation of multiple kinds of drama cultures. First proposed by Dr. Steven Karpman (a student of Eric Berne, the psychologist who developed transactional analysis), the drama triangle suggests that people in dysfunctional interactions take one of three roles, based on their natural personality/tendencies and early experiences.

Below we present the three interactive roles Karpman proposed, with our own take on them from our observations of organizations:

- **Victim:** Those who perceive they are persecuted by others. They also may be in denial or self-pitying, leading to ineffectiveness.
- **Persecutor:** Stereotypical bullies but also those who act in passive-aggressive ways, ultimately diminishing performance and morale.
- **Rescuer:** Ostensibly, these are do-gooders who want to help others (especially victims), but they may be dysfunctional in their own way, focusing on others’ problems instead of their own.

Importantly, people in organizations often become entrenched in their specific roles for long periods, contributing to a negative pattern of interactions and performance at all levels.

Drama Culture in Associations

Our work within and research on the association sector reveals several factors that have made associations more at risk for drama culture.

For most of the last decade, in response to a changing economy, the association sector has transformed how it delivers programs and services to members. This has manifested in reductions in staff size, increased outsourcing, and greater demands on remaining full-time leaders and their staffs to operate at maximum productivity levels. Similarly, many associations have had to eliminate vague job descriptions and raise expectations of responsibilities for each role in their now-smaller organizational staff—which has increased accountability and left little room for suboptimal performers to “hide.”

The silver lining in shifting to the new

model of association management has driven expectations of greater productivity among individuals and teams. Many associations have risen admirably to the imperative of becoming leaner, meaner, and more efficient. Their leaders have built their mission, vision, action plans, operations, and culture around the principles of mission-driven leadership: accountability, responsibility, mutuality, integrity, and empowerment, among others. This includes creating drama-free cultures and taking active steps to address any emergent symptoms of drama, which maintains high performance levels.

Still, given that culture is often “in the walls,” it can be difficult to identify the presence and impact of drama, especially in the face of shifting sector dynamics. Indeed, our study of associations shows that many are “head down,” focused on core operations such as membership services, programs, advocacy, funding, and board relations. While strong operations are a key attribute of association management, it can also keep an organization from maintaining vigilance around the changing needs of key stakeholders (members, funders, strategic partners, others) and the shifting environment of its industry or sector, potentially providing pressures and uncertainty that spur unwanted drama to enter the culture.

Such “drama creep” is difficult to detect, like an invisible cancer eating away at the internal organs of an association, requiring awareness, vigilance, and a highly proactive approach. The next section discusses how to recognize signs of drama culture, including specific forms it might take.

Five Types of Drama Culture

Our work with associations and other organizations has highlighted multiple signs and symptoms of drama culture, as characterized by five specific types we'll discuss below.

Generally, drama cultures will have overt and covert features. Some may be obvious to those within and outside the association, like visible conflict and resistance among colleagues, abuse of power by leaders or employees, or actions that go directly against an association's mission. Others will be more subtle and harder to detect,

such as denial, mistrust, gossip, backstabbing, or jockeying for recognition. All contribute to poor outcomes for performance and morale.

Think of the drama culture types below as “pure forms,” rather than those reflecting the exact situation of a given association. Some actual organizations may indeed fit the description very well; but most associations with a problematic culture will have features associated with multiple types. Regardless, understanding the drama cultures here can help you identify challenging elements of your association's culture and take steps to improve.

Slow Death Drama: (“Everything is fine”) These associations have typically been struggling with remaining relevant to their members and their missions for a long period, but are in deep denial of this reality. Leaders and others in the organization can't see and/or have chosen not to keep pace with the world changing outside their walls, while also failing to deal with cultural erosion within their walls. For example, we know of a global tech-related association “making its membership numbers” every year, but at the same time becoming less relevant as nimbler, more tech-savvy rivals gain ground.

Zero-Trust Drama: (“Everyone for themselves”)

These cultures are marked by backstabbing, gossip, poor information-sharing, and lack of transparency/communication. In many cases, the organizational culture is marked by scarcity (of funding, resources, staff). Fundraisers or foundation executives may be trying to develop their own relationships to funders, taking credit for others' work, or actively seeking outside opportunities. This type of culture can involve both active aggression and passive aggression, whether it's outright conflict such as that of our opening-example association, or more subtly destructive interactions, such as people reluctant even to copy colleagues or “reply all” to emails. At another association, trust runs so low that even the most minor decision must be made by consensus, impeding progress across levels.

Pervasive Denial Drama: (“No problems here”)

In associations with this drama culture (a more general form of the Slow Death Drama above), conflict is avoided at all costs, as people deny

its existence in the first place. People may be civil with one another and seem satisfied enough, but there's no real engagement with internal or external parties, no enthusiasm for the mission and vision. The general feeling in such cultures is that people have given up on their own fulfillment, and certainly that of the organization/mission, and are just "punching the clock," present physically but not in spirit.

Anxiety Drama: ("Nothing is certain") Here, the main theme is uncertainty, as people don't know what will happen in the future, both to themselves and to the association and its mission. While anxiety can be part of a healthy organization (as we discuss later), this type of anxiety is destructive and breeds second-guessing, sticking to suboptimal routines, maintenance of the status quo, catastrophizing (believing the worst will happen and it will be unmanageable, such as losing all funding sources), and the appearance of being busy without making meaningful progress. In such associations, people may seem engaged, but they're engaged with the wrong activities: instead of delivering high-quality programs or services or seeking to improve service, they are caught up in busywork or other low-value-added activities, such as attending meetings with little real impact on organizational goals.

Authoritarian Drama: ("Our leader is everything") In these associations, everything is up to and depends on the leader (or small leadership group), often a charismatic but highly controlling figure. As a result, there's no real collective decision-making, even if there are committees and other ostensible decision-making groups/interactions. Indeed, people take no responsibility for development of potential at both the individual and organizational levels. Some people have blind trust in the leader and simply "toe the party line," while others who might normally contribute novel ideas fail to do so, believing their contributions will be shot down or stolen. Not surprisingly, these organizations struggle with succession (planning and execution), and their missions suffer under controlling leadership and during any leadership transitions, as there are few healthy systems and interactions in place.

Deal Proactively with Drama Culture

The good news is that a drama culture, even a highly destructive one, need not represent a permanent state for your association. There are specific steps you can take to address and improve such a culture, with the goal of moving from Mission-Challenged to Mission-Driven. Our work with a range of organizations along this spectrum has yielded specific steps for addressing drama cultures, as detailed below.

Identify the drama: The first step is to assess the presence of drama and its potential sources. The descriptions of drama culture types above present many of the symptoms to look for: aggressive and passive aggressive behavior, conflict, denial, catastrophizing, withholding information, second-guessing, clock-punching, and many others. Importantly, such drama can happen at any level of the organization, including the leadership team, board, and general ranks.

Accept the presence of some drama: Here we don't mean to accept all the elements of a destructive drama culture, but to acknowledge that drama is a natural part of any organizational landscape, including yours. Culture is the sea we swim in, and drama is inevitable within it. So rather than asking "How can I get rid of any drama here?," ask "What drama elements are in the way of our mission, and how can I contribute to identifying and addressing the symptoms?"

Identify sources of drama: Once you've identified elements of a drama culture—and recognized the difference between naturally occurring and destructive drama—work to understand their sources. These can be wide-ranging. It's possible that one person is driving much of the drama in your culture, such as an overly ego-driven leader or manager. But more likely, drama emerges from a dysfunctional system with multiple contributors. As suggested by the drama triangle concept we presented earlier, drama is inevitable when people habitually play specific roles of persecutor, victim, and rescuer. Drama can also stem from misalignment or unexpressed needs among staff, leaders, and boards, such as unwillingness to talk about conflict in a productive way, repression of true opinions, and fear of

"It's important to recognize that most any human interaction will have some elements of drama, and that's not a bad thing."


or failure to deal with the natural emotions that arise when people work together. Identify and document as many sources of drama as possible and look for how these may relate or feed into one another to develop a plan for improvement.

Create and maintain a Mission-Driven culture: Rather than taking a narrow approach to improving specific sources of drama, the general goal should be to create and actively maintain a high-performance, mission-driven culture—one that gives people little motivation to create drama, and rather to direct their efforts and energy at upholding the association's mission. Among the multiple, non-exhaustive elements of Mission-Driven cultures are:

- Support for mistakes and anxiety: Within Mission-Driven cultures, people understand that failure and mistakes are inevitable parts of doing business, with the goal of learning from these rather than engaging in blame or justification (as happens in drama cultures). Similarly, there's recognition that anxiety can be a positive indicator of an association's commitment to high-value, high-stakes outcomes for members and broader society. On the other hand, excessive anxiety and avoidance of anxiety and conflict can contribute to drama cultures, as described earlier.
- Empowerment and autonomy: In Mission-Driven cultures, leaders feel empowered by their boards and fellow executives, and those in the more general ranks feel empowered by leadership to serve their members. Empowerment and autonomy actually create a greater sense of trust throughout the organization, improving communication and performance.
- Ownership: Empowerment and autonomy also promote a greater sense of ownership among your people, such that everyone owns her/his own role and responsibility while also looking out for others. Do people go home after they complete their deliverables or stick around to help others with theirs? Is there a "not-my-job" mentality in your organization or one where people routinely step outside the offi-

cial bounds of their roles to help fulfill the mission? Answering these questions can help you determine the level of ownership people assume in your association and take steps to improve it.

- Principles and systems of excellence: Hoping for excellent performance isn't enough. You need to have specific principles and systems in place to make it happen. That can mean things like asking everyone to pledge not to withhold information from colleagues. Or ensuring people presume good faith when assessing their colleague's motives. Or creating an environment that encourages and rewards authentic expression, vulnerability, and risk-taking. There are many others, and the idea is to develop and communicate from within the staff what principles they want to orient to in their interactions with each other and throughout the association.

We hope your association is free of the drama culture elements described here. If so, congratulations! (And we don't believe you!) If not, reading this article may well be the first step in your journey to identifying, acknowledging, and improving your drama culture. There is hope—we see it in associations that decide to shape their cultures for the benefit of their staff, volunteers, and ultimately, their members. It helps to have humor as a starting point, and to recognize it's a journey—possibly the most worthwhile journey to take. 

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How to Ask Your Boss for Professional Development

By Chloé Daniels

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Jennifer Nemkovich, CAE, has been at the American College of Chest Physicians for 12 years, serving in multiple roles including Chief Strategy Officer, Senior Director of Strategic Planning and Operations, as well as her current role as Chief of Staff and Senior Vice President of Professional Development. Jennifer was a 2015 recipient of the Association Forum of Chicagoland Forty Under 40® award. She can be reached at jnemkovich@chestnet.org.



ou feel like you're always drowning from competing priorities and impending deadlines that seem unrealistic and frankly, impossible. You're never sure how to say "no" to a colleague when your plate is so full it might topple over and take you down with it. You're worried that even though you've been promoted to a new role, you're failing and you're not sure how to offload your old job so that you can focus on your new position and your new roles.

Sounds like you could use some professional development.

These days, professional development comes in all shapes and sizes, whether it's a class, webinar, conference, or pursuing a specialized certification. These opportunities can be costly, which can make asking your boss for budget dollars to cover the expenses of your advancement a little intimidating. How do you even begin to approach that conversation, especially if you work at a nonprofit where money is often tight?

Jennifer Nemkovich, CAE, Chief of Staff and Senior Vice President of Professional Development for the American College of Chest Physicians (CHEST), knows professional development. Recently under her leadership, CHEST rolled out a three-tiered professional development track for all 103 of their employees to address the needs of their staff, newly promoted managers, and the changing roles of the executive leadership team. We spoke with Jennifer to discuss the importance of professional development and how to approach it on both an individual and organization-wide level.

FORUM: What is your organization's view on the value of professional development?

As an organization, if you're not spending the money on professional development, the time, effort, and cost that you're going to incur at the end of the day from not supplying your people with the resources, support and knowledge they need to be successful is going to cost you so much more. People will leave for other opportunities, and people will lose their jobs because of competence issues.

One of the things I talked to our CEO about was that we are an education organization. Education is part of our mission, and if that is what we want to do for our members, why wouldn't we want to do that for our staff? We want our members to be doing the best job they can, and we also want our staff to be doing the best job that they can. We want to make sure that everyone we touch has the tools they need to be successful throughout their career. That's why we started a really concerted effort on professional development.

FORUM: What is CHEST doing to meet the organization's professional development needs?

We are rolling out three different professional development tracks: one for all staff, one targeted at managers of people and processes, and one for senior leadership. All three of those groups have different needs. Professional development isn't necessarily a "one size fits all." At the all staff level, there are skills that need to be honed such as business writing or how to present—skills that people need to get to a managerial level. At the manager level, there are skills that are needed in order to effectively manage a team. Then, at the senior leadership level, you have to be able to think strategically on behalf of the organization.

As we were creating these tracks, we recognized that the cost to send people to external training is very high, but knowing that this is a priority for us as an organization, we decided to create the tiered program in-house. We now host sessions that staff are able to attend during normal work hours. It's more cost effective to



"As an organization, if you're not spending the money on professional development, the time, effort, and cost that you're going to incur at the end of the day from not supplying your people with the resources, support and knowledge they need to be successful, is going to cost you so much more. People will leave for other opportunities, and people will lose their jobs because of competence issues."

have someone come here for \$2,000 and give a three-hour session to 40 staff, than trying to send 40 staff to that session somewhere else.

With that in mind, we also do have to send staff to specific trainings that are more specialized. When we send them to training at a course or conference, we ask those who attended to provide a brief summary on what they learned. They then have to present that to their colleagues at a division meeting. It helps in a couple of ways. It also shows that they did have some key takeaways that they are bringing back and will apply to their work. It makes them really think through what they learned. Sharing how they can apply it and put it into practice allows them to improve their presentation skills and reinforce the learning they received.

FORUM: How did you approach creating this program for your staff?

In previous years, our HR team received a lot of feedback that newly promoted managers didn't feel like they were being successful in their role, and they wanted the resources and tools to help them better lead their teams. As we were looking at the cost across the board, we didn't want to just send these five managers who came to us for this, we wanted fifty people to be able to get access to this education.

We started with combing through the literature to see what competencies a good leader needs to have and ended up identifying seven competencies and skills. Based on those results, we then organized our professional development training by working with a couple of different groups, such as Lake Forest School of Management, and Carroll-Keller group to pick and choose which courses most aligned with our needs as an organization.

We also made sure that each session builds off the last one, and it's not just these one-off sessions. For example, we've done a lot with StrengthsFinder, and we've tried to incorporate discussions around that into each thing that we do so that there is always a component of linking back to what was previously discussed. We try to connect the dots so that each session builds off of the previous one.

For the senior leadership track, it's a little different. Senior leaders have advanced to that level because they are good at leading teams, but now they have to think strategically on behalf of the organization, and how to grow the organization. We've done a few training courses, but the majority of our sessions are facilitated discussions amongst the senior leadership team. We'll often task the team to read a book, and then we'll come together, discuss it, and talk about how we can apply what we've learned to help the organization grow.

FORUM: When you were developing these tracks, did you receive any pushback from your peers or decision makers? If so, how did you overcome that?

The little pushback I received was definitely about the cost. That's one of the first things that the CFO wants to look at every time, but I went in prepared with the numbers to show how much it costs an organization to lose an employee. It's about \$30,000 to replace someone, based on the production that is lost during that recruitment, learning curve time, and training, including training for the supervisor or even co-workers. When a new person is brought on to the team to replace someone, several people are giving up work time to help bring that person along and up to speed.

The cost of having to replace somebody, just one person, is about the same on what we spend on track of professional development for the entire year for everyone. That's a powerful argument.

FORUM: What advice would you give to individuals preparing to ask their bosses for professional development?

I would say it is incumbent on you to be proactive and have that conversation. As a boss, that's what you want to see from your team. We are here to do our best to help develop you, but it's not my job to identify the career path for the 25 individuals on my team. That's your job, and you need to sit down and think about what direction you want your career to go. I'm happy to help you get to where you want to be—I can give you advice on what is going to help you get to that next level, identify what tools you might need or areas you might need to work on, and I can follow up with you on your progress. I am happy to be a partner throughout the process, but you really have to be proactive in having those con-


versations and knowing where you want to go.

Make a place for yourself. Everything you learn is not only valuable to you, but you're becoming more valuable to the organization because you are expanding your knowledge and skill base, and are then able to participate in new and different ways.

Even if you've been turned down before due to cost, I would recommend you go back with a strong argument. Explain the cost, what you're going to learn, and how it's going to contribute to the organization. Really illustrate that benefit, and once you do that, ask for the rationale behind their answer if they say no.

If it's the case that even after you've explained the benefit there is just not room in the budget, ask if the opportunity can be built into the budget for next year. Sometimes it happens that there really are just no budget dollars left in the year, so you need to be flexible, and be proactive about letting your boss know before the budget is built for the following year. If they still say no, then you might have the wrong boss.

FORUM: What type of advice would you give to an organization that may be reluctant to spend money on professional development?

The cost is so much higher to an organization for not providing professional development opportunities. Please don't let the cost be your driver for decision making unless you're ready to replace your team in a few years. You want to have competent people working for you. 

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Climbing the Leadership Ladder ...but what if there isn't one?

By **Matthew S. Switzer**

Hannah Andrews

*Associate Director, eLearning,
Association for Professionals
in Infection Control and
Epidemiology (APIC)*



A Northern Virginia native with a love of technology, Hannah has been working in the association community since 2011, currently serving as the associate director of eLearning for APIC, the Association for Professionals in Infection Control and Epidemiology. Prior to joining APIC in 2015, Hannah worked at MCI USA (formerly Coulter Companies) where she managed membership, marketing, and educational programs for a number of association clients. When she's not playing around in Articulate Storyline, she's wandering D.C. with Finnegan McCool, her miniature pinscher puppy.

Megan Tompkins

*Junior Graphic Designer,
Association Management
Center (AMC)*



Megan Tompkins is a Junior Graphic Designer at Association Management Center (AMC) in Chicago, IL, where she specializes in print design including magazines, brochures, newsletters, program books and direct mail pieces. She also most recently won an award through Association Trends All Media contest for Most Improved Magazine when she worked collaboratively with her team to transform a print magazine to digital a digital publication.

Jay Gilbert, Ph.D.

*Manager, Divisions and
Career Pathways,
Institute of Food Technologists (IFT)*



Jay Gilbert, Ph.D., is manager of Divisions & Career Pathways at the Institute of Food Technologists (IFT). He volunteered with IFT for eight years prior to coming on staff in 2017. During those years he rose through the ranks of the IFT Student Association (IFTSA), eventually becoming IFTSA President and sitting as the student representative on the IFT Board of Directors and Feeding Tomorrow Foundation Board of Trustees. These experiences grew his passion for strategy while pursuing his Ph.D. from Purdue University in food science. Originally from New Hampshire, in his spare time he enjoys traveling and baking (especially chocolate espresso cake).

John Doe

*Association Professional,
From whereabouts
unknown*



(Redacted) is the (redacted) for the (redacted) Association. He has (redacted) years of experience in (redacted) and (redacted) and currently serves as a volunteer on the (redacted) committee. In his free time, he enjoys (redacted) and spending time with his (redacted) named (redacted).



Join me if you will on an imaginary journey. If you aren't a millennial, pretend you are one—and no, we are NOT going down the millennial-bashing rabbit hole, so leave your Tide Pods and avocado toast at the door. Rather, picture yourself in your late-20s/early-30s and working for an association. You prefer texts over phone calls, Lyfts over taxis and experiences over material goods.

Like many young professionals, you're hungry for professional advancement and the compensation that generally accompanies the upward trajectory through leadership. Most associations have a clear leadership path for their volunteers, but do they have one for their own staff? I asked a handful of young professionals about their experience.

In addition to the three professionals who agreed to be interviewed on record, there was one other who asked that his quotes not be attributed. If you read on, you'll see why, but the input is valuable nonetheless.

FORUM: Does your association have a clearly defined leadership ladder for you?

Andrews: The beauty of APIC is that it has a clear professional development structure in place. APIC values things such as strategic thinking and going above and beyond, and does a fantastic job of getting people the recognition they deserve when they see that kind of behavior. APIC also has a high level of expectation when you're hired; you're expected to be proactive and show initiative.

I was in the organization for two years and was fortunate enough to get promoted. If you look at the staff structure, there is a clear path. The titles are diverse across the organization, which illustrates the opportunity for growth.

Gilbert: At IFT, we are fortunate enough to be such a diverse organization that opportunities for career advancement are not only vertical, but cross-functional. IFT encourages an environment of not working in silos, so no matter where you are or what part of the organization you're in, you can work with other areas outside of your specialty. As an example, I am in the Knowledge and Learning Experiences Department, but

I also work very closely with other disciplines such as membership, marketing, and science and policy initiatives to ensure we're all aware of the happenings within each department. This cross-departmental exposure allows me to better understand how those segments run, and how what they do relates to my work.

From a career pathways standpoint, there are clear opportunities for you when you come into the organization. The big question is "what do you want to do within the organization?" As the manager of IFT's Career Pathways initiative, it's been interesting to understand how professionals within the science of food migrate through their career, but also how those findings correlates to my current position and organization. From what I've learned, experiences beyond your normal job function help define your next career move. Fortunately, IFT encourages that.

Tomkins: At AMC there are both formal and informal professional development opportunities available to me. As a designer, I am fortunate enough to have a manager that has also served as a mentor and role model for me. Without AMC, I wouldn't have had the opportunity to work so closely with someone so senior.

Outside of professional development for my specific position, we have a young professional SIG (Special Interest Group) specifically for employees of AMC. On a monthly basis, we learn about an area of expertise outside our specialty.

If I wanted to pursue something beyond my area, there is room to grow. For example, I can take a role on the client team. I don't feel pigeonholed into the creative department.

Unnamed Association Professional: The other professional I spoke with noted that their current position did not have a formal leadership ladders in place. The organization's internal staff is so small that the only way for professional ad-

“When you’re working on building relationships as a young professional, and you start with the mutual respect and responsibility that comes with working in a team environment, you are more likely to set yourself up for success.”

vancement would be for their superior to leave the organization, and for them to assume the role. While I am not able to speak in fact, I can assume that this is not an abnormal challenge for smaller associations or AMCs.

FORUM: How does your association officially and unofficially help you regarding professional development?

Andrews: You may not hear APICs tell you, “we want you to come up with a great idea,” but as I mentioned, they encourage creative thinking and will generally never tell you “no.”

When I first started, I met with a staff member at my level from another department and together we created a cross-departmental task force. We immediately got representation from every department at all levels, from coordinators to vice presidents. The group is now officially reviewing and rethinking our website from a content organization standpoint. This outgrowth came from staff-driven interest in going outside their normal day-to-day responsibilities.

This opportunity also afforded me the opportunity to present our findings to the senior group, allowing me to show my strengths and abilities to colleagues with whom I generally would not have exposure. This helped foster and grow a mutual respect, and now I’m getting pulled into more strategic conversations that are beyond my day-to-day responsibilities.

I also appreciate this isn’t just an organization where we have an ASAE membership and if you choose to go, that’s great. They want us to attend professional development events, expand our network, and in turn, bring that growth back to the organization. Part of the reason I continue to be active in ASAE is because of the environment my firm has created.

Gilbert: Over the past several years, IFT has implemented a robust strategic planning process that includes not only goals for the organization, but individual professional development as well. For some, these goals are oriented around attending conferences, expanding management skills or learning a new skill that may be relevant to their current or future position. As a trained food scientist, it was important for me to learn more about associations, which is why I’ve participated in ASAE courses and opportunities.

One of the greatest attributes of IFT is the openness and willingness to discuss and expand new ideas. It’s been fascinating to watch how someone, including myself, brings up an idea. At the start, it may not be the perfect match or fit for the topic we’re focusing on, but just the openness to expand it beyond that initial idea to create better and more effective programs has been amazing. We bring in other people and allow ideas to morph and change. We’re not afraid to take risks. If we come up with bold, new ideas, they allow us to run and expand upon them as we go.

The amazing part about IFT is that our hard work doesn’t go unnoticed. Even though I came into the organization less than a year ago, I’ve had the opportunity to present a new vision for the volunteer groups I help manage to our board of directors. Our senior leaders definitely help to shine the light on new ideas and people, no matter your level in the organization and I find this very motivating.

Tomkins: At AMC, our design teams are often meeting as a group to review each other’s work, provide critiques, and recommendations for improvement. As a designer, it can sometimes be a challenge to keep our ideas fresh. By having such opportunities for presentation and feedback, we are always pushing each other to perform at a higher level.

Another important benefit we are offered is we can go to any type of conference that is beneficial to your title. As a designer, I am always looking for ways to push my creativity. One of the best ways for me to do so is to see what other designers outside our firm, outside our association fields, and even outside associations are doing.

Unnamed Association Professional: This is where the tone changed for the professional who opted not to be named. At his association, the leadership placed a very high value on professional development. There was ample budget made available for traveling to conferences, and the flexibility on those conferences was broad. For example, you didn't have to be a design-focused professional to attend a design conference.

FORUM: Do you have a specific approach to working with leadership?

Andrews: I think it is important for all professional relationships, both with volunteer leaders and internal superiors, to be built on the foundation of teamwork. With volunteers, one of the nuanced challenges is their engagement level. Association activity is often a secondary or tertiary priority, and they have other things to do, first and foremost their day jobs. But there is also the understanding that they have committed to serving in that capacity. The same can be said when working with a supervisor. Teamwork and collaboration are absolutely necessary and a needed function of your relationship.


When you're working on building relationships as a young professional, and you start with the mutual respect and responsibility that comes with working in a team environment, you are more likely to set yourself up for success. Furthermore, if you stay true to the organization's mission, you know you're working collaboratively on initiatives that are critical to the organization, and that's one thing that everyone can agree on.

Gilbert: When working with leadership, both volunteer leaders or association leaders, I tend to take a very strategic approach. I find it most beneficial to start with the 'Why?' For example, 'why are we looking to change this program or improve

this process?' This helps set the foundation for the discussion and explain the possible ROI right from the start.

I'm cautious not to go right to the 'What.' I'm a firm believer that ideas may not be completely perfect right from the start. It's important to let ideas grow and develop, and sometimes the best opportunity for that to occur is when you pause after the 'Why' and set aside time to discuss it. You never know what angles people in the room may take when addressing the conversation.

Tomkins: Especially being on a design team, you have to depend on colleagues. One of the things I have honed during my time at AMC is the ability to tack and receive constructive criticism on the projects I'm working on. I have a great deal of confidence in my own abilities, but I would not have been able to develop the strong work I have for my clients were it not for the feedback and input I've gotten from my team.

Unnamed Association Professional: If you haven't guessed and have made it this far in the article, the "unnamed association professional" is me. While it is unfortunate that my association isn't large enough to offer most of our staff a clear leadership ladder, we do provide ample opportunities beyond. For better or worse, we know that there are some professionals that we will eventually lose to other associations because of this challenge, but we prefer to focus on the long term. We want our staff to be as highly developed and functional as possible, not only for the short-term betterment of our association, but for the long-term benefit of the association profession as a whole. 

Matthew S. Switzer is the Director of Marketing and Communications at Turnaround Management Association. He can be reached at msswitzer@turnaround.org

MARCH 2018

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Cook and Kocher Insurance Group	www.cookandkocher.com	2
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Register Now!

SUPPLIER PARTNER INDUSTRY ESSENTIALS: Working Effectively with Associations

March 21, 2018

11 a.m. - Noon

Learn the do's and don'ts of
working with associations!

Presented by:



Jacqualine Price Osafo, CAE
*Director of Membership and
Development
Water Quality Association*



**Robert A. Vitas, Ph.D.,
CAE, CFRE**
*Executive Director
American Academy of
Periodontology Foundation*

Register at associationforum.org/mainsite/events/calendar



2018 Membership at a Glance

Total Members
<4000

Individual - 28%
Forum Plus - 72%
Forum Plus
Organizations - 99

69% Female
31% Male

Number of Employees

Average - 62
Highest - 1000
Lowest - 1

Ethnicity

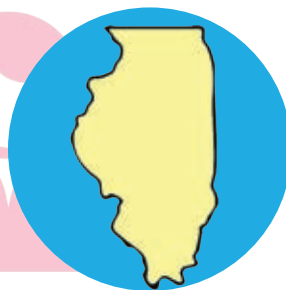
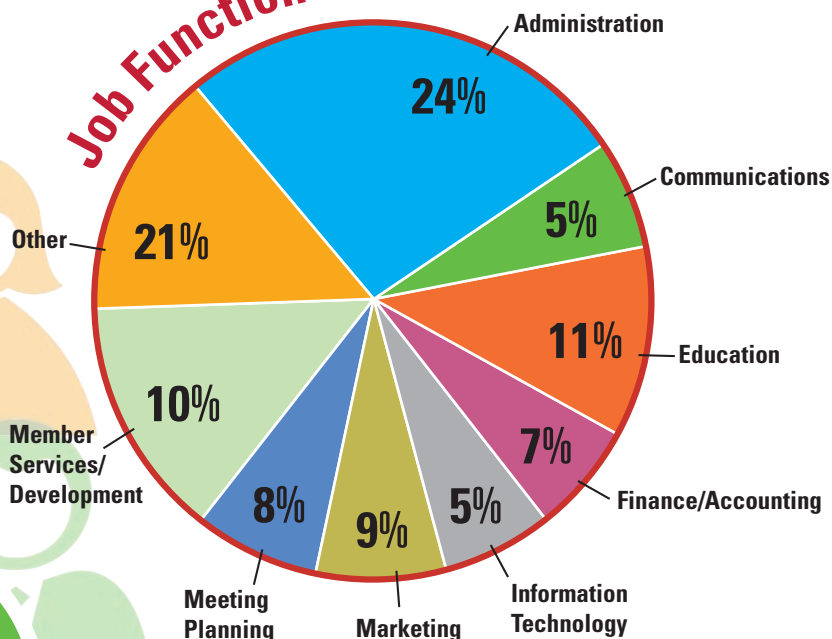
89% Caucasian/White
7% African American/Black
2% Hispanic/Latino
2% Asian

*Based on responses
of 26% of membership*

Number of CAEs


458

Job Function



Illinois Membership

61% - City of Chicago
39% - Suburban

Industries Served (top 3)



Health care - 32%
Association Management - 7%
Libraries - 4%



March 2018

MAR
21

**Webinar: Supplier Partner Industry Essentials Series:
Working Effectively With Associations**
11 a.m. – Noon

Learn how outsourcing and vendor decisions are made at associations so you can build long-standing relationships with the association community to drive your organization's revenue.

MAR
21

Women's Executive Forum Conversation Circle
11:30 a.m. – 1:00 p.m.

Join us for an entertaining and educational gathering to explore communication and personal branding to further your personal and professional success. Presented by Stephanie Leese Emrich.

MAR
22

IT SIG
9 – 10:30 a.m.

MAR
27

**CEO Exchange: 4 Keys to Success – How Mid-size
Associations Can Punch Above Their Weight**
9 – 11:30 a.m.

Explore how associations of any size can increase organizational value, relevancy, impact, size and revenue; increase emphasis on audiences beyond members; achieve greater revenue diversity through specialized strategies and more!

MAR
27

**Webinar: Best-in-Class Strategies for Improving
Engagement, Satisfaction and Ultimately, Retention**
11 a.m. – Noon

Hear the results of a three-year membership engagement benchmarking study involving over 1000 organizations from around the world. See which engagement strategies work best for different types of members and how associations can leverage this data to increase retention.

April 2018

APR
12

Chicago Industry Exchange
3:30 – 7:30 p.m.

In collaboration with Choose Chicago's Annual Meeting, Industry Xchange is an industry-wide, collaborative education and networking event for the meeting and events industry.

APR
17

Mentoring for Member Engagement
9 – 11:00 a.m.

Review what is needed to design and structure a sustainable mentorship program and how to avoid common mistakes. Walk away with the tools to determine if hosting a mentoring program is right for your association and if so, how to build it.

APR
18

Webinar: Association Forum Membership Orientation
11 a.m. – Noon

Join Association Forum's membership team to learn how to leverage your membership to advance your career. This session is ideal for those who are new members, prospective members or members who want a refresher on everything included with membership.

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associationforum.org/events



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

Calendar Legend

● Education Events ● Shared Interest Group Events ● Webinars

Location is Association Forum, 10 S. Riverside Plaza, Suite 800, Chicago, 60606, unless otherwise noted.



May 2018

**MAY
3**

Association 101 – Downtown Location
9 a.m. – 4 p.m.

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.

**MAY
8**

Public Policy & Advocacy SIG
9 – 10:30 a.m.

**MAY
15**

International Conversation Circle
9 – 11 a.m.

Do you want to keep abreast of international trends for associations? Have a chance to exchange ideas and learning with peers about your international initiatives and programs? Join this conversation circle and help us get the conversation going!

**MAY
17**

Webinar: Making Big Website Improvements Through Small, Manageable Changes
11 a.m. – Noon

Your website is your most valuable marketing tool and keeping it up to date can be tricky. Learn top tips and tricks on how to keep your website fresh and actionable, by making simple and affordable changes, writing for the web and learning how to test the user experience.

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DECONSTRUCT
RECONSTRUCT

June 27, 2018

Venue SIX10

610 S. Michigan Ave., Chicago

Forum Forward 2018 will be focused on creativity, ideation, incubation and application for associations. This daylong learning lab will allow you to engage with thought leaders while exploring new concepts and strategizing on how to advance your association. We strive to make this an interdisciplinary experience to stimulate you and other association executives to explore beyond typical boundaries to drive your association Forward.

forumforward.org

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Promotions and Changes



Association Forum is thrilled to welcome **Katie Callahan-Giobbi** as our new Chief Operating Officer, effective February 20. Callahan-Giobbi brings decades of experience in the tourism, hotel and meetings industries to her new role, in which she will oversee business development, marketing and communications, sales and internal operations. Prior to joining Association Forum, Callahan-Giobbi was an Executive Vice President at Minding Your Business, Inc.



Wylecia Wiggs Harris has been named CEO of American Health Information Management Association (AHIMA), effective Feb. 5. She joins AHIMA from the League of Women Voters of the U.S., where she served as CEO since 2015. Harris, who has a Ph.D. in organizational management from Capella University, succeeded **Lynne Thomas Gordon, MBA, CAE**, who left AHIMA in July 2017.



Trevor Mitchell has been named the Executive Director of the Texas-based American Mensa, the largest of the worldwide Mensa affiliates. Mitchell is just the fifth person to hold the title of Executive Director for the 71-year-old organization. He has been with the organization since 2015, when he joined as Senior Director of Membership and Strategy.



Anna Salt Troise has joined The American Academy of Orthopaedic Surgeons (AAOS) as Chief Education Strategist. In this role, Troise will direct AAOS's education and peer-reviewed publishing activities. Troise previously served as Vice President, Medical and Open Access Publishing at Wolters Kluwer and has held executive positions at Nature Publishing Group and John Wiley & Sons.

News and Awards



Phillip Jones, President and CEO of Visit Dallas, was included by *D Magazine* in The Dallas 500, an annual list of the most influential business leaders in North Texas. Jones has served as leader of the Dallas CVB since 2003. During his tenure, he has overseen the building of the Omni Dallas, the creation of the Dallas Sports Commission and the introduction of the first Diversity and Inclusion department by a destination management organization.



Congratulations to **Dawn Sweeney**, CEO of the National Restaurant Association, and **Abe Eshkenazi**, CEO of APICS – The Association for Operations Management, on being named 2018 Association Leadership Award Winners by CEO Update. Sweeney was honored as the Trade Association CEO of the Year, while Eshkenazi was named Professionals Society CEO of the Year. Both will receive their awards at a luncheon on September 20 held at the Marriot Wardman Park Hotel.



New Association Forum Members

Individual Members

Sarah Billmeyer, Hyatt Regency Schaumburg

RJ Carr, Billhighway

Kathy Daniels, American College of Chest Physicians

L. Dan Doyle, Detroit Metro Convention & Visitors Bureau

Beth Eddleman, National Certification Board for Diabetes Educators

Lorne Edwards, Visit Phoenix

Andrea Goldberg, Shepard Exposition Services

Adrian Honderick, Florida Society of Association Executives

Alice Kelsey, American Association of Neurological Surgeons

Michele Lawrie, Visit Phoenix

Erin Lemons, Agilutions

Michele Luckman, National Certification Board for Diabetes Educators

Sarah Marino, MAERB

Kathleen McCann, American College of Surgeons

Nichole Mumford, Council of Supply Chain Management Professionals

Drew Navolio, David James Group

Stefanie Ross, Detroit Metro Convention

Tyler Runyon, ATL Airport District

Steven Stout, Texas Society of Association Executives

Stephanie Wohlfert, Greater Lansing Convention & Visitors Bureau

Forum Plus Members

Joyce King, Max Moses and Connie Paslaski, Academy of General Dentistry

Christina Bessette, Marguerite Clark, Angela Lasky, Sherry Lindbak, Joél Payne and Kirsten Yehl, American Association of Diabetes Educators

Marianne Niles and Heather Niziolek, American Association of Endodontists

Ruth Gonzalez, American Association of Law Libraries

Katherine Muench, American College of Healthcare Executives

Michelle Adams, Shelly Encher, Alena Frey and James Walwark, American Orthopaedic Foot & Ankle Society

Tara Azzano, American Society for Dermatologic Surgery

Bernie Dudek and Joy Keller, American Society for Gastrointestinal Endoscopy

Toni Diones, Amanda Mannina, Vito Manola, Veronica Noland, Lisa Norman and Gonzo Schexnayder, American Society of Anesthesiologists

Evelyn Alexander, American Specialty Toy Retailing Association

Roger Morales, American Theological Library Association

Steve Carasso and Mia Cary, American Veterinary Medical Association

Alberta Johnson, Sarah Lombardi and Jonathan Thatcher, Appraisal Institute

CJ Nelson, Association of Nutrition & Foodservice Professionals

Demetra Alexopoulos, Meghan McRae and Amy O'Keefe, C200

Carol Campbell, Gregory Fine, Kristin O'Connor, Pattie Pereyra and Ben Wilson, CCIM Institute

Sybil Joseph, Congress of Neurological Surgeons

Keelin Billue, Laurie Kwiatkowski, Timothy Mucha, Anne Mullen and Andy Tippet, Emergency Nurses Association

Suzanne Murphy, Ewald Consulting

Ron Antoine, Maura Bilek and Elyse Palm, Healthcare Information and Management Systems Society (HIMSS)

Francine Blazowski and Rocio Shah, International Association of Lighting Designers

John Gormley, Mainstreet Organization of REALTORS

Alyssa DeSantis, Andrea Khalil and Crystal Wukovits, National Roofing Contractors Association

Denise Malcolm, Precast/Prestressed Concrete Institute

Beatrice Pedersen, Selected Independent Funeral Homes

Elizia Artis, Erin Butler, Kevin Gammonley, Priscilla Gil, Keishia Jones, Terry Kirk, Danielle Mardahl, Tom Myers, Steph Nelson, Patrick O'Connell, Michelle Omansky, Casey Smith, Megan Styler, Kathy Sveen, Turner Uligian and Kaylee Williams, SmithBucklin

Ahmed Khater, John Landry and Andrea Ray, Society for Academic Emergency Medicine

Mindi Walker, Society for Vascular Surgery

Tiffany Berger, Society of Actuaries

Steven Burger and Eva Lopez, Society of Gynecologic Oncology

Joe Zgrabik, Turnaround Management Association

Forum Plus Organizations

C200



Digital Extra

To access GrowthZone's "Annual Association Survey" visit the digital or mobile versions of *FORUM*.

GrowthZone Annual Association Survey

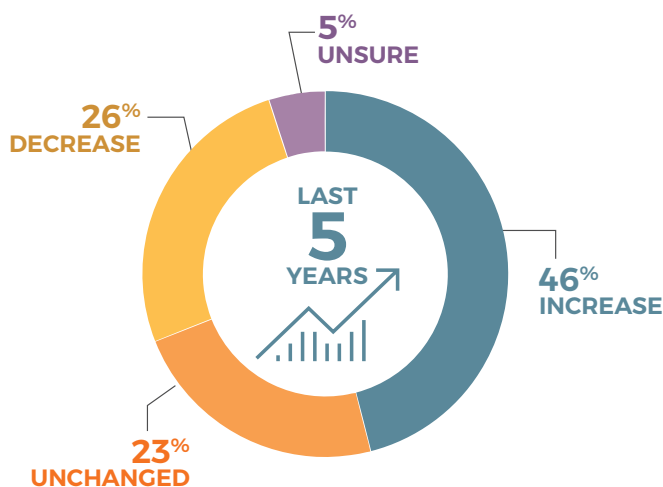
GrowthZone has released the 2018 edition of its Annual Association Survey. Over 1,000 association professionals from across North America were asked about a variety of topics, including membership growth, event attendance, email marketing and challenges facing the industry.

Almost half the respondents indicated an increase in membership growth over the previous five years, but that number dropped when asked about overall growth in the past year. When asked why members weren't renewing, association staff responded that lack of engagement/interest, lack of value/no ROI and budget cuts were the biggest reasons.

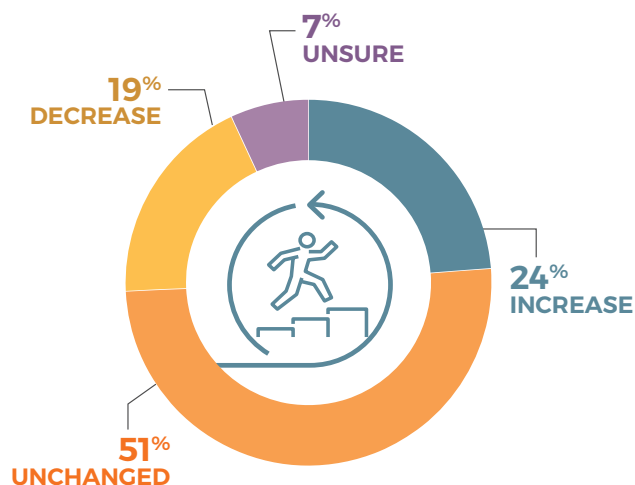
When asked about the biggest challenge holding their association back, the top three responses were lack of funding, resistance to change/complacency and not enough staff. The fourth response, outdated technology, was echoed in a later question wherein around two-thirds of associations said that they weren't currently using credit card readers at events. Overall, these findings show that associations continue with the industry-wide struggle in finding and allocating resources.

MEMBERSHIP GROWTH:

LAST 5 YEARS



RENEWAL MEMBERSHIP:



TOP 10 HOLDING ASSOCIATIONS BACK:

WE ASKED, "WHAT'S THE #1 THING HOLDING YOUR ASSOCIATION BACK?"

WHAT RESPONDENTS SAID:

1. LACK OF FUNDING
2. RESISTANCE TO CHANGE/COMPLACENCY
3. NOT ENOUGH STAFF
4. OUTDATED TECHNOLOGY
5. LEADERSHIP
6. BOARD OF DIRECTORS
7. AGING MEMBERS
8. PARTICIPATION
9. MEMBER ENGAGEMENT
10. INDUSTRY CHANGE

Source: GrowthZone's "Annual Association Survey"



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