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On the hit NBC show, *The Office*, regional manager Michael Scott is famous for his lack of self-awareness. On TV, this shortcoming leads to high comedy, but in real life, it can lead to frustration, confusion and diminished influence. Communication expert and 2018 Women's Executive Forum keynote speaker Stacey Hanke shares her tips on how to bolster your communication skills and influence through increased self-awareness.

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The physical space that your association inhabits may be as important to its brand and mission as any piece of your organization. As more associations are relocating and renovating their offices, they are seeking to incorporate creative design to adapt to a changing workforce and emerging technologies. *FORUM* spoke with three architects who have helped to redesign the offices of Chicago associations about the trends and evolutions of the modern workplace.

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Lynne Thomas Gordon, CAE
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Refueling for the Future

As we begin a new fiscal year at Association Forum, I am reminded of the book “Great by Choice” by Jim Collins and its tag line: “Uncertainty, chaos, and luck—why some thrive despite them all.” As an organization, we continue to thrive despite the economy, politics, competition, environmental changes, shifting demographics and the threats facing associations in general.

What makes us thrive?

We have dedicated members, a welcoming environment, partners who make it possible, outstanding volunteer leadership and an amazing, dedicated staff. When you put these components together, we thrive despite the many challenges and changes all of us face as association professionals. The good news is that we will continue to thrive this next year and beyond.

At our strategy planning session in 2017, the board identified what makes Association Forum valuable to the association community and to Chicago—we are curators of great content, have an accessible network of programs and professionals and share communities of best practices. We convene great minds and utilize face-to-face sharing to gain knowledge. We provide opportunities for growth and career enrichment, and we seek out learning from each other through a local community of peers. In 2018, we will continue to build on these positive attributes as well as re-fuel for the next 100 years.

In John Kotter’s book, “Leading Change,” he states that, “Organizations will be pushed to reduce costs, improve the quality of products and services, locate new opportunities for growth, and increase productivity.”

At Association Forum, we have a willingness to try new things, provide continued and enhanced collaboration and balance the struggle to stay grounded while remaining adventurous. We are committed to staying operationally strong, bringing new content to our members, focusing on non-dues revenue streams, forging relationships with partners and continuing to live out our welcoming environment culture.

I am delighted to be part of this community and volunteer for an association I love and admire. I hope each of you will join me in continuing to move Association Forum forward as we live our values and implement our strategy for the future. We will take time to select high-impact opportunities for success, clearly define our direction and execute.

Please join me as we refuel for the future.

Lynne Thomas Gordon, CAE
 Association Forum Board of Directors Chair,
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2018-2019 Association Forum Board of Directors

Association Forum is pleased to introduce its 2018-2019 Board of Directors, which assumed office April 1. Our board represents the wide diversity of organizations that form and support the Chicago-area association community.



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Celebrating Our Volunteer Leaders

Leadership Reception | March 14, 2018 | Wyndham Grand Chicago

Overlooking an incredible view of the Chicago River, the volunteer leadership of Association Forum gathered at the Wyndham Grand Chicago on March 14 to celebrate and be recognized for their immeasurable contributions to Association Forum. The annual Leadership Reception is an opportunity to show our appreciation for our volunteer leaders and recognize our Board of Directors for their leadership and guidance during the past year.



Group who fills this very magazine with relevant and thought-provoking content, our 200-plus volunteer members and 15 volunteer committees make it possible to for us to provide all the member benefits, networking opportunities and educational content that is available to our members. We wish to express our sincere and unending gratitude for all that they do, and we look forward to another successful year as a community. 

At the event, Association Forum welcomed four new board members and bid farewell to those who have completed their terms, including our outgoing chair, Rob Paterkiewicz, CAE, MBA. We also introduced our 2018-2019 chair, Lynne Thomas Gordon, CAE, whose leadership and experience as an association executive will help direct the strategic vision of our organization over the next fiscal year.

Association Forum is powered by our volunteers. We quite literally couldn't do what we do without their tireless dedication to helping us fulfill our mission of advancing the profession of association management. From the board who guides our strategic vision to the chairs who plan our SIG events to the Editorial Working



Thank you to our transitioning board members:

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Collective Conversations at the SIG Summit

SIG Summit | March 5, 2018 | The Gray Hotel by Kimpton

The 2018 SIG Summit brought together 100 members of Association Forum's shared interest groups for a full day of education and networking at the Kimpton Gray Hotel in Chicago. The goal of the SIG Summit was to spur stimulating conversations around the varied topics and interests that matter to the membership of Association Forum. This year, the event sold out within a week of registration opening, indicative of the eagerness and high level of excitement of attendees.



"The spirit of Association Forum's shared interest groups is all about collaboration, idea sharing and problem solving together with your peers," said Moe Malek, Association Forum's manager, membership and engagement. "The SIG Summit was the perfect representation of this idea, bringing together all 14 shared interest groups under one roof. It was an honor to oversee this member event with the help of a great group of volunteer leaders."


The event featured six breakout sessions that combined the wide-ranging interests of the 14 different SIGs. The idea behind the structure was that no matter which shared interest group an attendee was a part of, they could attend a breakout that was not only relevant to their interests, but also incorporated collaboration from SIGs they may not be directly involved in.

"The energy was incredible from the opening moments of registration for the event to the close of the networking session at the end of the day," said Julius Rhodes, SPHR, vice president of human resources for the American Osteopathic Association. Rhodes gave a keynote on Resiliency and Emotional Intelligence—The Power Within You, a topic he feels is important because: "When you are trying to bring together volunteers it's often difficult to maintain their connection to a cause without having formal authority. As a result, I felt it was important to provide an address that attendees could use to help support them when they either received pushback or were not quite sure how their message was being received."

Beth Schlesinger, vice president of Public Communications, Inc., presented a breakout session entitled Putting Your Best Foot Forward: How to Effectively Represent Your Association to Any Audience. In that session, Schlesinger spoke of the need for a unified voice across the association, as

consistent messaging is imperative to build trust in a brand.

"We all have knowledge and experiences to share that can be relevant and of value to others," shared Schlesinger. "By attending the SIG Summit, you have the opportunity to explore and learn from different aspects of associations."

At the conclusion of the day, all attendees joined together for a general assembly led by Debbie Denyer, senior sales manager for Mission Point Resort Mackinac Island and chair of the Shared Interest Groups Committee, where they were asked to share their takeaways from the day. The general assembly closed with an update from Immediate Past Chair Rob Paterkiewicz on the strategic direction of Association Forum. 



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Confident. Proud. Fearless.

Women's Executive Forum | March 7, 2018 | Marriott Marquis Chicago

Each year, the Women's Executive Forum brings together the association community's brightest current and future women leaders. On Wednesday, March 7, the seventh annual iteration of the event continued and built upon the tradition of providing a safe and welcoming space for women to learn and grow together.

Females CEOs from across the association world, along with their carefully selected "Rising Stars," gathered at the Marriott Marquis Chicago to engage in education and dialogue around the topics specific to being a woman in the association industry and embodying the theme of this year's Women's Executive Forum: Confident. Proud. Fearless.

Stacey Hanke, a renowned communication expert and keynote speaker, presented Influence Redefined: Be the Leader You're Meant to Be, Monday to Monday® to all attendees. "I have experienced over the years of my work on the topic of influence that a female's communication can prevent her from being heard, prevent her from getting promoted and respected," says Hanke. "I was honored to share practical and immediate how-to's with this group to help them continuously grow their influence."

The break-out sessions including a closed-door, candid talk among CEOs, a discussion on "having it all" for Rising Stars and an in-depth examination of sexual harassment. At the session Transformative Leadership Toolkit for the Aspiring CEO, life coach Maureen Glass encouraged attendees to turn down the volume on their Inner Critic and turn up the volume on the Wise Voice. "I hope the attendees gained an awareness of our inner dialogue and how important it is to pay attention to that dialogue," Glass shared. "The event was interesting and empowering. There was so much good energy in the room. The reception in the beautiful room, overlooking the city, was the icing on the cake." 



At the conclusion of the day, attendees were asked to write down a thought-provoking idea from the day. Below, we share a few of these takeaways:

"How important your communication style/habits are when trying to build trust and consistency. Never turn it off. Engage the same way with all relationships."

"I assist others in thinking about their futures, but I have not taken the time to be deliberate about where I want to go with my future. I have not been intentional in my professional life."

"Always negotiate. The worst answer is no."

"Silencing my inner critic. I feel more confident, more fearless and more empowered."

"Who do I want to be today?"

"Stacey's action items have already impacted how I email and hopefully, someday, how I speak. Never knew how this would impact my credibility, or the perception of my credibility."

"Is my personal brand consistent?"

"It's up to us to carry forward our values in our organizations. Strong leadership has no gender."

"Spend less time focusing on what I can't control and more time focusing on who I want to be."

"Creating a to-be list in addition to a to-do list."

"Practice, practice, practice communication to remove fillers and to adapt to the needs of the listeners, and to align message with behavior consistently."

"Learn to be comfortable being uncomfortable. When you are uncomfortable, that leads to growth."

"I am worth it!"



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Conference Poachers and Fake Meeting Websites

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



Q: Is there anything we can do to stop unauthorized companies from directing our members and conference attendees to “fake” conference websites?

A: Many associations have faced the distressing situation of discovering that an unauthorized company is directing potential meeting attendees to a website containing information about their meeting and encouraging attendees to reserve sleeping rooms and travel accommodations through the unauthorized site. These “poachers” set up websites with the “look and feel” of an the official meeting sites. The websites typically include all relevant meeting information—dates, location, registration links, agendas, session descriptions, etc.—and offer to secure housing reservations. In addition, they often use the association’s name and logo and are hosted on domains that include either the association’s name or the name of the conference (or both) and are clearly designed to dupe attendees into booking meeting accommodations and/or travel directly through the unauthorized website. Not only is such deception potentially illegal, but it also has the potential to cause serious monetary damage by robbing the association and/or its authorized (and contracted) partners of commissions and rebates (by directing attendees to book “outside the room block”) and by impairing the association’s ability to fill its contracted room blocks at official meeting hotels (which may result in costly attrition damages).

While it can be extremely difficult (and often next to impossible) to track these companies down, don’t despair. Once an

unauthorized website has been identified, there are a number of steps an association can and should take to stop the offensive and misleading activity.

As an initial step, determine whether the website is violating the association’s intellectual property rights. Chances are that if the unauthorized company is using the association’s trademarks (i.e., the association’s name, logo, the name of the conference or the conference logo) in its marketing emails, on its website or in its registered domain name, it is infringing on the association’s valuable rights. Accordingly, the association should work with its attorney to send a “cease and desist” letter demanding that the company immediately stop using the association’s trademarks and cease and desist all infringing activity including, for example, by taking down the fake meeting website and ceasing all marketing activities using the association’s trademarks or otherwise designed to mislead the association’s members and meeting attendees.

As a practical matter, if the poacher’s postal or email address cannot be located (because its domain registration is “private”) and it’s impossible to contact it through its website, sending a cease and desist letter may not be a viable option. In those cases, if the poacher’s domain name includes a trademark registered to the association, the association can initiate a “take down” or “domain-name dispute” process with the applicable domain name registrar (e.g., GoDaddy, HostGator, Domain.com) to shut down the website (e.g., using the domain name registrar’s “take down procedures”). As a holder of trademark rights, an association can initiate dispute


proceedings arising from alleged abusive registrations of domain names (for example, those using your registered trademark(s) in a domain).

It also is a good idea for an association to contact its contracted hotels to inform them of the website’s actions and request that they advise the association of any reservations booked by the unauthorized company and make sure they credit the association’s room block for those reservations. Ideally, a hotel contract should include language stating that the association will be credited for rooms booked both inside and outside the block. Associations working with a housing company should bring the matter to its attention as well and work together to address the unauthorized bookings.

The association’s best weapon may be simply to inform its members. Let members know, in a carefully crafted email or other communication, that the website in question is not authorized to book rooms or travel to the annual meeting and that the website is “fake.” Be sure to identify all authorized housing and meeting vendors, include links to the official annual meeting website, identify all official hotels and be proactive.

Finally, there are a number of preventive measures an association can take to try to minimize the likelihood of these attacks. First, in order to reduce the risk of a poacher setting up a “fake annual meeting website,” the association should register as many association meeting-related domains as it can. For example, the “XYZ Association” should consider registering “xyzannualmeeting,” “xyz2018annualmeeting” and “xyzannualmeetingNYC”.com, .org and any of the other

major generic top-level domain registries that make sense and are feasible (i.e., .net, .info, etc.). While it’s likely impossible or impractical to register every conceivable domain, associations should consider registering those that are most relevant and readily associated with its meetings. By securing those domains, the association sets up obstacles that inhibit a poacher’s ability to succeed in its deceptive practices.

Moving quickly by using blast emails to instruct meeting attendees to be wary of unauthorized vendors and encouraging them to use only the association’s authorized housing services or other booking method can substantially mitigate the damage that unauthorized websites can cause. Associations should take steps to direct their members to the official annual meeting website as soon as possible (even if it’s just a landing page), let them know the names of the official meeting hotels, and, if a third party is managing housing for the meeting, make sure they know the names and contact information of the authorized housing service and that NO other entity is authorized to book meeting accommodations. Finally, it also helps to remind leadership and other engaged members to bring any questionable emails or other marketing materials or attempts to the association’s attention immediately, as well as to assign a staff member to actively troll the internet for poachers. 

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.

Why CEOs Need to Be Thinking About Emotional Intelligence

By **Bill Benjamin**

As a CEO, are you investing in the development of emotional intelligence in your organization? If not, your competitors probably are.



Bill Benjamin
Training and Leadership Expert
Institute for Health and Human Potential

Bill Benjamin is a training and leadership expert at the Institute for Health and Human Potential and a contributor to *The New York Times* best-selling book, "Performing Under Pressure." Bill is a sought-after speaker on the topics of emotional intelligence and performing under pressure, and is a monthly contributor to *CEO Magazine*. He works with people in high-pressure environments, including senior executives at Intel and Goldman Sachs, Surgeons, and the U.S. Marines.

Recently, there has been a resurgence in the popularity of Emotional Intelligence as evidenced in magazines articles—including *Time*, *Inc. Magazine*, *Forbes*, *Harvard Business Review* and many more. In addition, the number of times the term emotional intelligence is being searched on Google has increased steadily over the past three years.

A World Economic Forum report recently ranked emotional intelligence as the sixth most important skill needed in 2020 in order to manage the coming fourth industrial revolution. EI wasn't even on the list for 2015. For those who know the brain science of emotions, you will know that EI also underpins the other nine skills, including creativity, people management and even complex problem solving.

The concept of Emotional Intelligence (EI/EQ) is nothing new. Dan Goleman wrote the book "Emotional Intelligence" in 1996 and at The Institute for Health and Human Potential, we've been delivering our Science of Emotional training programs to organizations for more than 20 years.

So why the sudden resurgence of interest in emotional intelligence? We work with hundreds of companies and thousands of leaders in almost every industry and six of the factors we see causing this increase are:

1) The amount of disruption and change people are facing. In large part this is driven by new technologies, but we also see an increase in the number of corporate restructurings, new product launches, government regulations, increased competition, etc., that are increasing how much change people are facing. As we wrote in our All Change is Personal white paper, effectively managing this amount of change and disruption requires high levels of EQ.

2) Technology and the new demands of the workplace. People are feeling the need to be on 24/7 and are often feeling overwhelmed by the amount of email, texts, social media, etc., they are dealing with. In addition, many people are feeling that work/life balance is a nice idea but not a reality. People are feeling more pressure and stress than they ever have before.


3) The need for innovation and creativity. With the rapid pace of technology and the ease with which new competitors can enter a marketplace (did you know Amazon is now one of the largest providers of cloud computing services and competes with Microsoft and IBM in that space?), organizations need people to be innovative, which requires collaboration, agile teams and a culture that allows for risk-taking and failure, which are EQ-based skills.

4) Service based economy. As we move to an economy based on services and not just making products, people skills are more important than ever. How many times have you been on a call with a customer service person who you can tell isn't engaged and doesn't really care about your issue?

5) Globalization. This has been happening for many years and it continues to be critical for organizations to be able to understand (i.e., have empathy for) the unique needs of each culture in which they sell or have employees.

6) The millennial generation. The millennial generation has been raised with core values that include things like having a purpose, serving others and constantly improving oneself. In fact, one recent study showed that 80 percent of millennials strongly believe that developing and cultivating emotional intelligence is a key aspect of their career development.

The World Economic Forum calls this new reality the fourth industrial revolution. For your organization to compete in this new world, Emotional Intelligence is a critical competency that needs to be hired for and developed/trained in employees and leaders. The good news in all of

this is that Emotional Intelligence is a skill that can be taught: There is brain science that people can learn and training people can participate in where they learn strategies to manage their and other's emotions more effectively. Without it, there will be many more Blockbusters to tell your grandchildren about. 

Bill Benjamin is a training and leadership expert at the Institute for Health and Human Potential. He can be reached at bill.benjamin@ihhp.com.

This article previously appeared in *The CEO Magazine*.



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You May Not Be as Influential as You Think You Are

Three Steps to Increase Your Self-Awareness

By **Stacey Hanke**

This may be a bold title, especially because you don't know me. But what if I was right? Have you ever given thought as to how your communication may be sabotaging your influence without you even knowing it?



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Stacey Hanke is the founder and communication expert of Stacey Hanke Inc. She is the author of "Influence Redefined ... Be the Leader You Were Meant to Be, Monday to Monday®" and "Yes You Can! Everything You Need From A to Z to Influence Others to Take Action." Stacey and her team have delivered thousands of presentations and workshops for leaders of Fortune 500 companies, including Coca-Cola, Nationwide, FedEx, Kohl's and AbbVie. Learn more about her team and company at www.staceyankeinc.com.

Most leaders I have worked with haven't given thought to this question, much less taken the steps to increase their awareness of how their listeners hear and see them rather than what they believe to be true. That is why self-awareness is the first step to greater influence Monday to Monday.®

I should warn you that this critical first step of gaining greater self-awareness requires you to be open-minded, vulnerable and committed. Influential communicators acknowledge that they don't know everything, and they are open to self-discovery.

It is natural human tendency to base our opinion of ourselves on how we feel when we communicate rather than the facts of how we actually look and sound. Our thinking is, I feel good; therefore, I am good. More often than not, what we feel inside doesn't translate to what listeners are seeing and hearing. We may believe that we are better communicators than others think we are. Or, the opposite may be true. Others may see us as better communicators than we think we are, like the woman who thought her face turned red and her hair shook when she spoke in front of a group.

To enhance your influence, you need to evaluate your communication based on facts, not feelings. You need to get to the heart of what is really going on by experiencing your communication through the eyes and ears of your listeners and readers.

There are two primary ways to get the facts about your communication and grow your self-awareness. One is to proactively seek meaningful feedback. Getting feedback from others is an essential part of improving your communication and enhancing your influence.

The other way to get factual data about your communication is to watch yourself on video or listen to yourself on audio. Video in

particular is the ultimate form of factual feedback. Video acts like a mirror, enabling you to see exactly what others see and hear exactly what others hear when you communicate. What you see and hear is who you truly are when you communicate.

When was the last time you recorded yourself speaking on video or audio? If it wasn't within the past six months, there is a strong probability that you don't know the facts about your communication.

Video recording yourself is the only way I know to reveal the truth of what your listeners see and hear. As painful as it might be to watch and hear yourself, is it any worse than spending the rest of your career clueless as to what others are thinking about you or saying about you behind your back? As much as you might not want to do it, videoing yourself is one of the greatest investments you can make in your life, both professionally and personally.

Make a commitment TODAY to increase your self-awareness by recording yourself and watching/listening to the playback. Only you can make it happen. You have to be all in!

1. Recording:

- This week, audio or video record yourself at least five times: during a meeting, phone call, presentation, or face-to-face and virtual conversations.
- It is quick and easy to record yourself with either video or audio on your smartphone, tablet or computer.
- If videoing yourself during a presentation or meeting, increase your credibility by explaining to your audience, "I'm recording my presentation today because I am constantly working to develop my communication skills."

- If audio recording yourself during a phone call, only record your side of the conversation unless you specifically ask permission to record the person on the other end.

2. Playback:

- Immediately after the event or interaction, watch the video or listen to the audio playback. Immediacy is crucial so that you can more easily compare how you felt as opposed to what your listeners actually saw and heard.
- Watch and listen from your listeners' viewpoint. Trust what you see and hear. Believe what the video shows.
- Give yourself feedback:

Is there a difference between how you felt during the recording and how you look?


What perception would you have of yourself based on what you see and hear?

Would you be influenced by your communication?

What do you want to change?

- Use the Self-Awareness Checklist (free download at www.InfluenceRedefined.com) to help you evaluate your message and body language, such as movement, eye contact, gestures and facial expressions.

3. Action:

- Document the specific actions you will take to improve your communication and grow your influence using the Self-Awareness Checklist.
- Hold yourself accountable to practice the behaviors and skills that need improvement in your daily interactions. 

Stacey Hanke is the founder and communication expert for Stacey Hanke Inc. Learn more at www.staceyankeinc.com.



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Welcoming and Inclusive Doesn't End with the Invitation



By **Mary Ann Passi, CAE**

Association Forum's Welcoming Environment mural



ny organization or meeting professional that plans events is used to asking about vegetarian meals or special needs. Even requests for gluten-free, dairy-free and paleo options are becoming the norm. But is that enough? There are still other groups out there that we may be unconsciously excluding or biased towards. Carol Pape, CAE, chief operating officer for the Association of Professional Chaplains® (APC) shares how her organization works to ensure all individuals are respected at APC events and urges other organizations to do the same.

Special accommodations are nothing new. Most organizations have made such accommodations for their members or attendees in the past, as it's important to be respectful and accommodating (within reason) in order to provide your attendees with a welcoming and inclusive event. Many organizations already take into consideration physical disabilities when arranging their meetings, such as selecting ADA-compliant venues with ramps. Special consideration can be made for less visible disabilities, such as preferred seating for the hearing impaired and older attendees and those requiring additional but simple accommodations.

Accommodating Needs Across Varied Faiths

Does your organization offer invocations or prayers before meals? It may be time to reevaluate your approach.

- Ensure your staff or volunteers offer an inclusive pre-meal prayer. Christian prayer, Jewish blessing or faith-specific prayers can often leave people feeling left out or disenfranchised. A general reflection, such as the reading of a story or poem, is a great solution.
- During a recent APC board meeting, "Oh, The Places You'll Go!" by Dr. Seuss was read aloud during a moment of reflection. This children's book offered our experienced board members many items to think and reflect upon.
- Pape shares, "Consider having different faiths offer prayers for different events. At APC, we have prayers before all meal events and prior to

our annual meeting. We ask different members of different faiths to provide the prayer based on their own faith and we work to include as many faith traditions as possible."

Additionally, refer to a multi-faith calendar and resources when planning major events.

- The APC consults a resource that highlights both annual calendars and definitions of the holy days. This includes major holy days and other less significant observations.
- Consulting with members of different faiths during the event planning can help you determine the importance of the various holidays, as some are appropriate for professional events while others are not. It can also help you determine the best times for activities and meals. Some faiths require followers to pray at specific times or retire to their room by sun down. Often a faith's follower is the best resource in sifting through the details.

Have you considered offering Kosher and/or Halal meals?

- Be aware that there is definitely an upcharge from hotels for these meals and budget accordingly. Your organization may also need to decide whether to pass on all, part or none of the upcharge to your member.
- Tip: People who normally eat Kosher or Halal can often work with vegetarian meals.

Finally, assess the need for your organization to provide a reflective or sacred space.

- Many groups have started to offer chair mas-

sages during conference or meeting breaks as a way for attendees to relax and regain focus during the long day of activities. This amenity is welcome, but costly, and there are alternatives which can be equally satisfying.

- Because APC is a chaplain organization, they arrange to have a room open from 6:30 a.m. to 9:00 p.m. to allow members to meditate, reflect or pray. “We have instrumental music on CD, a water fountain, battery candles, pillows and prayer rugs,” Pape adds. “While most organizations may not want to invest in this much detail, having a room available for meditation or prayer would be a great welcoming feature for many.” This is especially true as many people have incorporated meditation into their daily routines—in whatever form this may take.

Addressing Diverse Schedules

Friday evening and Saturday events can be convenient in that they don’t require an attendee to miss work, but be aware of how those days may be more difficult to attend for some groups.

- For Orthodox Jews, Shabbat takes place from sundown Friday through sundown Saturday. “For a group the size of APC, we can get better hotel rates by including those days and so we meet on Friday and Saturday,” Pape says. This may be true for your organization as well. By scheduling only optional “recreational” events on Friday evening and major events on Saturday evening, your organization can work within these religious observations. Some members may miss a few components of an event on Saturday, but making an effort to accommodate their faith is the more important consideration.
- Pape adds that, “Seventh-day Adventists also observe the Sabbath on Saturday and often will not participate in events.” For groups, she advises that while changing your schedule may not be mandatory, you should adjust expectations to realize why one of your top volunteers or board members may not be available.
- While APC adjusted policies and procedures to accommodate multi-faith members, some changes required an easy tweak. Almost everything decided by APC leadership is from the multi-faith perspective. “But little things

matter,” Pape adds, “For example, we don’t have our APC store at the conference or the collection for donations to our local charity only on Saturday when the Jewish members cannot exchange money.” A slight adjustment in hours can ensure that everyone has the option to participate if they choose to do so.

From the staff side, it may be fairly easy to accommodate adjustments to traditional schedules. But how do you convince leadership that change is necessary—even if members are not demanding change? As an organization made up of individual member chaplains from all faiths, APC doesn’t face too much of an uphill battle in terms of bringing leadership on board to these initiatives. However, other association leaders may face opposition. Pape suggests doing your research, polling members if possible, and presenting easy, cost-effective and efficient ways to accommodate the varied needs of your attendees. At the very least, have the discussion at the leadership level so they are aware that this may be impacting your organization and determine next steps together.

These may be changes to how your organization regularly does business. When it comes to incorporating new faiths or religious practices into APC’s events, Pape says, “Each year, we have a spiritual needs committee comprised of members from different faiths. Each of them contributes prayers, songs, devotions, meditative opportunities, etc., as suggestions on updates. As part of a board-certified chaplain’s clinical training is to be familiar with world religions and cultures, including understanding different requirements, this is a natural extension of their training.” For the rest of us, perhaps an annual review by event staff or volunteers could be part of our process for accommodating members.

Inclusivity in the Workplace

While we’ve focused on members, our organizations are employers as well. APC’s personnel manual states: The APC office is closed the following holidays: New Year’s Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day and the day after Thanksgiving, Christmas Eve and Christmas Day. Employees who observe religious holidays other than Christmas Day that may fall on a weekday may


“Special accommodations are nothing new. Most organizations have made such accommodations for their members or attendees in the past, as it’s important to be respectful and accommodating (within reason) in order to provide your attendees with a welcoming and inclusive event.”

discuss making arrangements for missing work on those days with their supervisor.

Sara Curtis, MBA, CAE, SPHR, director of human resources at the American Society of Anesthesiologists (ASA), shared the steps ASA takes to ensure an inclusive workplace:

- ASA offers one floating holiday per year to cover nontraditional holidays so that employees don’t have to adjust their schedule or use vacation time.
- The organizations takes into account special dietary restrictions when planning employee events.
- ASA pays attention to obituaries for service info and doesn’t automatically send flowers for death of loved ones. Obituaries often specify the families’ wishes and take into account different faiths.

Again, recognizing that not everyone is the same is the driver behind adjusting or developing any type of policy or procedure.

For APC, these accommodations are somewhat of a natural extension of who their members are and of the sensitivity required of professional chaplains. For other organizations, awareness is the first step to asking ourselves whether our members are staying silent and staying home because they do not feel welcome by our organizations. In today’s age of complete customization of a member experience, a little time and effort on this front could reap significant rewards for our organizations. 



Mary Ann Passi, CAE, is CEO of the Corporate Housing Providers Association. She can be reached at map@chpaonline.org. **Carol Pape, CAE**, can be reached at carol@professionalchaplains.org.

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How the ADA is Increasing Its Non-Dues Revenue

By **E. Ruth White**



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he American Dental Association (ADA) is looking to shift its revenue model from being predominantly driven by dues revenue to a model wherein a majority of its annual operating budget is supported by non-dues revenue.

Sound familiar? If you work for an association, it probably does, since increasing non-dues revenue is among the most important priorities for any organization looking to stay relevant and sustainable.

Historically for the ADA, the split between dues and non-dues revenue has been close to 50/50, but since the implementation of its strategic plan, *Members 2020*, the share of non-dues revenue has risen to about 56 percent as of 2017, with the ultimate goal being to raise that number to 65 percent. The strategy is to minimize raising membership fees, since higher fees tend to discourage membership growth. The ADA needs to generate an additional three to four percent annually just to cover costs from increases in existing salaries, benefits and basic overhead.

Like many associations, the ADA struggles with silos, limited resources and identifying the next wave of emerging market needs that could lead to filling the non-dues revenue pipeline with innovative and highly profitable products or services. Bottom line: Where should the ADA be investing resources for maximum results? To get the association moving in the right direction, ADA executive director Kathleen O'Loughlin, DMD, did two things: She created a hand-selected, cross-divisional non-dues revenue strategy team (Workgroup), and she turned to outside help.

Getting Started

For the Workgroup, the executive director bypassed the traditional senior management group and created a team of employees who “work in the trenches” generating non-dues revenue. Titles ranged from VPs to managers, and she made it clear that all participants sitting at the table were equal. To break down silos, she set a directive of creating an association-wide, non-dues revenue pricing strategy that could generate an additional four to six percent annually. She indicated she did not believe the solution would come from creating more products and services to sell to existing members; the ADA already has a robust line of products and services. She set deadlines of evaluating 2017 programs, improving profitability of the existing 2018 operating budget and creating a 2019 budget that met the revenue growth target. Then, after appointing a team leader, she stepped out of the day-to-day process of the Workgroup.

For outside help, the ADA turned to a consultant group with experience in enabling associations in non-dues revenue growth. The consulting firm was hired to evaluate the current marketing resources and ascertain whether the existing structure was generating maximum ROI. The ADA has an integrated marketing and communications division but also has separate, dedicated departmental and/or product marketing and sales resources (both in staff and budget dollars). Would the ADA generate more revenue by centralizing all functions? The second half of the consulting project was to identify innovative ways to grow revenue.

The Workgroup developed a charter, set deadlines and created subgroups to address specific issues: financial analysis, sales and marketing, pricing strategy, customer voice, product evaluation, innovation and cross-divisional product efficiencies. Moving forward in this manner successfully created buy-in and split workloads. However, this method also required numerous planning meetings, which put the Workgroup behind schedule.

Cost Allocation and Financial Analysis

The financial analysis team set about identifying non-dues revenue sources and how to fully load costs to evaluate profitability. The ADA has always matched direct product-development expenses (i.e., cost of goods) and included staff salaries and benefits in department budgets. The hole in the picture was overhead expenses and, more importantly, cross-divisional resources used to create products that were not allocated back to the department developing and selling the products.

For example, a patient education brochure developed and sold by the Product Development and Sales department has its content edited by someone in the Science Institute, is printed through production services in the Division of Integrated Marketing and Communications, is sold through an e-commerce website maintained by the Division of Information Technology and has customer sales questions answered

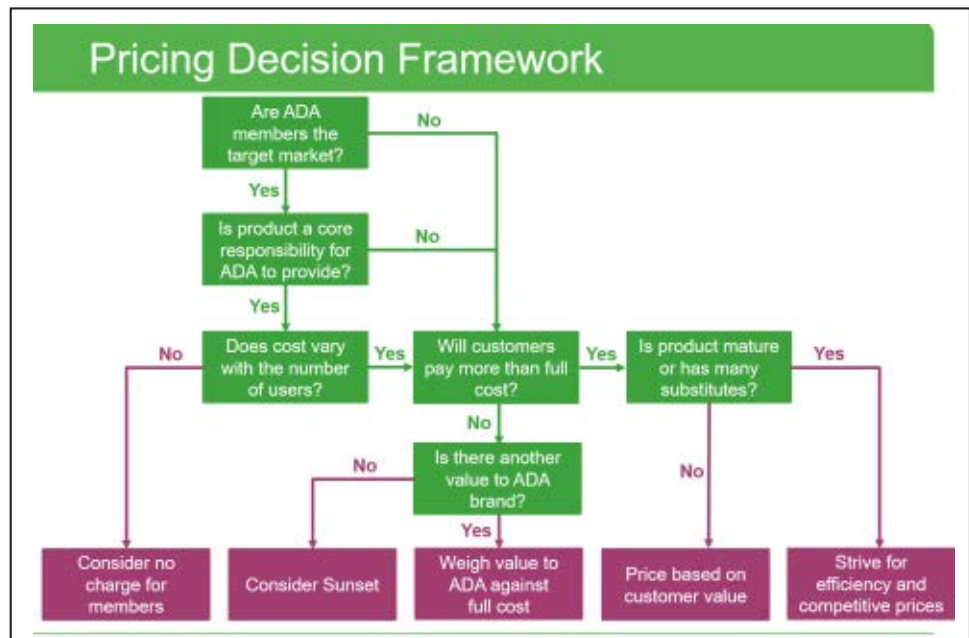
by call center staff in the Member Service Center under the Division of Member and Client Services. If Product Development and Sales was its own company it would have to pay for all these services, but it could also choose who provided these services.

The main challenges the financial analysis team faced included determining how granular to get; whether to use FTEs (head count) vs. percentages to calculate costs; meeting immediate needs for information vs. building a long-term budget process; and doing the cost allocation for the entire organization vs. just the non-dues revenue areas.

The first decision was not to get too granular as the goal was to create overarching strategies for day-to-day decision making. The group didn't want to fall into the trap of creating "data for data's sake," so instead, it identified the top product lines. For example, instead of fully loading costs into every single patient education brochure, the analysis would be done on the patient education product line.

For allocating general overhead costs, using a mathematical formula based on FTE of each department made sense. The ADA had already done this for certain areas that worked in conjunction with outside organizations that required transparency and justification of shared costs.

The true challenge was cross-divisional cost allocations. In determining the route to go, balancing the need for immediate information vs. being able to replicate the process consistently and provide monthly updates on expenses came into play. As the ADA was in the middle of converting to a new finance system, it was able to tap into some available consulting dollars to build a semi-automated solution. Annually the various cost centers would allocate a percentage of their budgeted expenses to the appropriate revenue center based on work they were doing on behalf of the various products. The finance department would facilitate these allocations, seek approval for the expenses from the revenue centers and input the appropriate percentage allocations into the finance system. At this time, the ADA has opted not to change its current budget processes and reporting tools. The new reports will be used as separate strategy tools for supporting pricing decisions, product resource allocations and sunsetting products. Dependent on the value of fully loading costs to meet its revenue objectives, the ADA might eventually rework its entire budgetary process and reports.



With feedback from the Workgroup, the financial analysis team decided that the cost allocations should be done for the entire organization, and not just the non-dues revenue areas. This was simpler for the Finance Division and would clearly delineate the expense of member benefits vs. the costs of creating salable products.

Pricing Strategy

The pricing strategy team immediately decided that one size cannot fit all and a single overarching strategy would not work. A review of past pricing decisions demonstrated that some areas had increased fees to offset inflation, some areas were limited in their ability to increase fees and that traditional types of non-dues revenue like advertising depended heavily on markets that are becoming more price competitive. Future pricing considerations needed to consider the target audience, a market assessment (product maturity, obsolescence, competition or substitutes offered by new technology), cost to provide the product, value to ADA other than revenue and governance. The outcome was a decision tree for the business units to use. (See figure above.)

Marketing, Sales and Innovation

While the cost analytics and pricing strategies were being developed, the marketing and sales team got to work with the consultants, conducting numerous interviews with the revenue-generating areas and the Division of Integrated Marketing and Communication Division. Based on their review, they identified that the ADA had a diverse portfolio of products across different customer segments and that the non-dues sales and marketing efforts were fragmented.

“Increasing non-dues revenue is among the most important priorities for any organization looking to stay relevant and sustainable.”

As a result, the ADA was generating a high volume of communications to customers, shared marketing services were over-extended and there was no consensus on priorities, leading to dissatisfaction. They proposed that the building blocks for success needed to combine sales enablement and marketing, branding, sales management and support functions like legal, IT and finance. The ADA should develop either a function and product matrix model that would allow it to resource sales and marketing specialists across products—or a function and customer matrix model that would allow it to develop targeted product portfolios to different customer segments. The ADA is continuing to explore how to implement a matrix model into their day-to-day operations that has a high level of scalability for revenue growth, standardization of processes and integration between functions for ease of hand-off between sales strategies and sales enablement.

Per consultant project scope, the ADA received a list of areas in which it might expand its product portfolio.


Customer Voice

The customer voice team set out to address the challenge of building an adaptable framework into the non-dues revenue business model that would continually monitor and incorporate customer voice into the product growth and lifecycle, capitalize on moments of truth in ways that satisfy customer needs and deliver a consistent and positive experience across platforms. The proposed strategy was to view the product portfolios through the lens of the customer type (dentists and dental team, industry customers, testing services and education), benchmark and track programs and incorporate customer voice on an ongoing basis for continuous improvement.

In the past, with a focus on the value as a member benefit, the ADA used various methods to track member satisfaction: member value and loyalty studies, Kantar Study, Decision Lens, McKinley Advisors and consulting companies like Frog. These methodologies didn't provide day-to-day, real-time decision-making guidance and were difficult to correlate with how to grow non-dues revenue by the different customer types. They did, however, provide a baseline for evaluating the various products and services. From that baseline, product managers and data analyzers could tap into the ADA's CRM data warehouse of customer sales and engagement, review monthly financial reports, engage in online and exit

surveys, and utilize the ADA's Advisory Circle and Clinical Evaluators Panel to constantly evaluate customer satisfaction and incorporate the customer voice into product development and sales.

Next Steps

The Non-Dues Revenue Workgroup has identified numerous strategies and tactics to move the ADA toward its revenue objectives, but there is still much work to be done. With the 2017 financial books closed, product lines can be evaluated for profitability by matching revenues with fully loaded costs. With this as a benchmark and a list of potential ways to expand the ADA product portfolio, the Product Evaluation, Innovation and Cross Divisional Product Efficiency teams can review the 2018 product lines budgets and recommend where to focus resources for maximum revenue growth. 

E. Ruth White is the senior manager, special accounts and licensing, Department of Product Development and Sales for the American Dental Association. She can be reached at whiter@ada.org.





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Flipping Marketing on Its Head

By Jim Burda

Jim Burda
Chief Revenue Officer
Chicago Sky, WNBA



Jim Burda is the Chief Revenue Officer of the Chicago Sky, WNBA. Burda joined the organization as the Vice President of Marketing Partnerships in 2014, the same year the Sky made it to the WNBA Finals. He is the author of the book "Championship Leadership, S.C.A.L.E to Success." The Sky play their first game of the 2018 season on May 19 against the Indiana Fever.

W

hen it is said that someone has “strong experience” or “expertise” in his or her field, it really means that the person overcame many challenges with positive adaptation.

I joined the Chicago Sky of the Women’s National Basketball Association (WNBA) in 2015 as the vice president of marketing partnerships and the 501c3 Sky Cares Foundation. Prior to coming on board, I had years of previous successful niche marketing and sales conversions in the worlds of tennis and video rental and in such saturated, high-competition categories as pizza delivery and fitness.

When we reached the disappointing milestone of 90 days without closing one successful sale through our marketing outreach efforts, we made the intentional choice to “flip our marketing on its head” to remain relevant and grow into the No. 1 position in the WNBA. Reaching out to members, the community or potential sponsors for associations or other nonprofit organizations is no different.

Schedule Regular “PS2 Sessions”

The most impactful strategies in business to reach and inspire special interest groups into action begin with understanding the limitations of your own organization combined with identifying the needs and motivations of your audience. Once you are on that track, you can implement regular and necessary “PS2” sessions—“Problem Spot, Problem Solve.”

If only problems are brought forth with no solutions, then the problems simply become complaints or obstacles, and innovation is never achieved. Once you identify your problems or challenges, then evaluate how much can be solved internally and stay open-minded to reaching outside your organization to fill your gaps. PS2 strategy sessions can translate into a success model for any business, particularly niche outreach to associations.

Get Feedback, Review Past Successes, Analyze the Competition

The best method for success is to ask for direct feedback. Once I heard that the Chicago Sky did not have “scale”—the size or scope of audience reach—compared to our male counterparts, and that how we defined ourselves was unclear beyond having “world class athletes” or “female role models,” our team started reviewing our past successes.

Unless your organization is a start-up, you have success models to build upon that have helped you get to this stage. Building on those successes can help define your organization’s niche. It also is important to study your competitors’ or other success models—not necessarily to copy those best practices, but to learn how to differentiate or exceed them.

It became evident that our niche was not sports marketing but engagement, community outreach and corporate responsibility facilitation—all of which are also essential to nonprofit associations. We are a social society. If your organization provides experiential engagement, it becomes a necessary facilitator to not only your growth, but those you serve.



Look to Strategic Partnerships to Increase Scale and Need

If your problem is ability to scale, set out to solve it by establishing strategic partnerships to rapidly increase your reach. All organizations have assets that can be bartered, traded and turned into mutual benefit. Examples of diversifying reach for the Sky included adding partnerships with AARP, Women's Business Development Center, YWCA of Metro Chicago and Fleet Face Race Series, along with media partners, such as *Chicago Parent*, *Chicago Woman Magazine*, WVON Radio and iHeart Radio.

Once we signed the strategic partnerships, we had much greater scale and diversity for outreach on behalf of our partners as well as the Sky. Instead of only reaching our existing fan base, now we had access to our partner databases of more than 178,000 people age 50 and over with disposable income through AARP, 12,500 Women in business through the Women's Business Development Center and 50,000 active young families through our Fleet Feet partnership.

Now our "small" professional sports organization could offer any outreach solution, and we created "raving fans" across an already diverse demographic base. Whether it is reaching the over 50 set with disposable income, women in business or young active families, we not only could solve any potential partner's outreach issues, we could amplify our messaging with our media partnerships. By utilizing the depth and strengths of others, your organization can stand out with an ability to deliver new outreach.

Connect Your Strategic Partners Through Experiential Engagement

Many people and organizations are looking for connectivity, engagement and lead generation and need or want someone to facilitate it for them. The Sky can deliver groups to networking events by organizing the events, marketing them, structuring and staffing them—it becomes a service that others want from the Sky because we

facilitate the outreach.

The Chicago Sky's business is very seasonal, with the female athletes competing opposite the men from May to September. To reassure our partners that our value was more year-round instead of working hard each March to get fans and marketing partners to remember us, we grew from hosting six events per year to more than 30 year-round.

Each organization has its own niche that can set it apart from others. With the Sky, our following is such that female leadership and reaching families was a natural specialty or area of expertise. By creating our #RedefinePossible Women's Leadership series platform, the Sky positioned itself as an organization that could deliver female business leaders into one room for structured networking, becoming very valuable for others to be willing to give up their time in their busy schedules for our events.

Provide Formats That Promote Connectivity

By simply hosting an event, you cannot guarantee its success unless you create a format that promotes connectivity. If you are hosting a tabling event, one of the best methods is to create a "passbook," which many associations use, too. Our sponsors who commit to tables evaluate the value on one factor only—how many people (potential leads) visited and engaged at their table versus simply walking by.

We offer an incentivized passbook that has each table listed on it, and we tell participants that if they visit every table and get marked off by the table host, the passbook can be turned in to a drawing for a prize. This ensures that people visit some tables that they might not have visited without the incentive. If your event is large, you can require only a certain number of tables be visited to gain the incentive instead of all of them.

Pre-structured networking is incredibly appreciated by attendees, too. Many people come to an event hoping to network and find new prospects, yet some are not comfortable with the process or have a hard time "breaking into a conversation."

“The most impactful strategies in business to reach and inspire special interest groups into action begin with understanding the limitations of your own organization combined with identifying the needs and motivations of your audience.”

Depending on the size of the event, you can set up tables of eight, and in 10 minutes, all participants have one minute to hand out their cards and give their “elevator” pitch about what their company does. Do this rotation three times, and in 30 minutes, you have guaranteed that each person walks away with multiple business card contacts, and the activity allows for follow up once people identify who is the right person with whom they should have an extended conversation.

Research Your Social Media Engagement Patterns


You cannot stay relevant without ensuring your social media is a force in its targeted messaging. Research your larger engagements, likes and shares and replicate that strategy—typically by showing video or posts pertaining to what value or interest your audience desires.

The common mistake of a social media strategy is focusing on what you want to say. What you want to say may not be of value or interest versus creating content your audience needs or wants. We are very much a “What’s in it for me?” society. If you post the equivalent of an ad, you may lose followers or engagement. Posting storytelling or information that is of benefit to your followers, not your organization, is what keeps social media growing. Better yet, if the benefit not only interests the follower, but possibly the follower’s friends and general public, you now have amplified social media engagement instead of just one post that goes nowhere.

Another key to amplifying your social media reach is to remember that it is people who engage in social media and to not solely rely on the posts themselves to organically grow without assistance. The more views a post has, the greater the likelihood it will get shared, commented on or liked. Once your organization posts a message, make sure your organization has an

internal social media policy for employees to engage. If you have 20 employees or strategic partners who average 1,000 followers each on LinkedIn, for example, asking each of them to share, like or comment on your organization’s post will guarantee it reaches 20,000 additional users who will potentially forward or share as well!

“S.C.A.L.E to Success” With Championship Leadership

It is the people in your organization who can drive a consistent approach to your reach to special interest groups. In leadership positions, a championship leader needs to S.C.A.L.E. to Success. Leaders need to adapt to a culture of Service leadership. If you serve others in your organization as well as serve your clients, you are better positioned to Coach versus direct. After coaching, Analyze what is working and what needs adjusting to keep the momentum moving forward. Leading also needs to be just that—Leading by example, showing both your clients and your organization that you are executing on the ground with them. Then seasonally, Evaluate your team to identify who is holding back your growth and service as an organization and whose skill set has yet to be fully tapped into to build off those successes. 

Jim Burda is the Chief Revenue Officer of the Chicago Sky, WNBA, and author of “Championship Leadership, S.C.A.L.E to Success.” He can be reached at jburda@chicagosky.net.



Association Office Design for the Future

Michael Berger

Director of Interiors,
GREC Architects
berger@grecstudio.com



Born in Chicago and raised in Illinois and Oregon, Michael earned his M Arch degree from Tulane University in 1993, having studied in Venice and served as president of the Architecture School student body. Michael returned to Chicago to pursue a career in Interior Architecture and Design and has earned a reputation as a leader in the field of corporate environments, executing projects for clients such as Braintree, Rocket Fuel, Sara Lee, Uber and United Way. Michael joined GREC in 2015 as director of interior design and workplace strategies.

Diana Pisone

Principal,
Ted Moudis Associates
dpisone@tedmoudis.com



Diana Pisone has more than 20 years of interior design and architectural experience and is especially known for her ability to allow aesthetics and function to work hand in hand. As team principal at Ted Moudis Associates' Chicago office, her primary responsibility is to serve as a liaison to the firm's clients and provide superior customer-driven design services. She also helps develop the next generation of designers as a part-time faculty member at the Illinois Institute of Art.

Liz Potokar

Senior Designer,
Gensler
liz_potokar@gensler.com



With more than a decade of experience, Liz Potokar's work covers a multitude of market sectors. Her passion lies in developing creative workplace environments that embrace a company's brand and culture. Her list of corporate clients include Association Forum, The Society of Thoracic Surgeons, SRAM, Gyro Advertising, Condé Nast + Pitchfork, Roche Pharmaceuticals, and Volkswagen Credit Inc. Liz's work has received two AIA Design Excellence Awards, two IIDA Red Awards for Best of Show and a Best of NeoCon Showroom Award. Liz has a Bachelor of Science degree in Interior Design from the University of Cincinnati. She has earned her National Council for Interior Design Qualification certification, as well as her LEED accreditation.

R

ecently, several Chicago-based associations have relocated from long-term homes to newer and more forward-thinking office headquarters. Having been in their locations for 10 to 30 years, C-level leadership are seeing their organizations housed in dated facilities which no longer support their mission and are a detriment to attracting and retaining talent. There is a desire by many to make significant and important adjustments to their workplaces, which will resonate for the next 10 to 20 years and support a new generation of staff and style of work.

To gain insight into what associations are seeking in their new office designs, we connected with three architects from Chicago firms, each of whom have designed new offices for several associations. Michael Berger, director of interiors at GREC Architects, Diana Pisone, principal at Ted Moudis Associations and Liz Potokar, senior designer at Gensler, discussed the ways designing for associations differs from corporate and technology clients, incorporating and enhancing an association's brand and mission through creative design, and embracing new technology and a changing workforce.

FORUM: There is a perception that associations use their office space less efficiently than many corporate or entrepreneurial tenants. Do you agree and if so, why does this appear to be so?

Pisone: We agree with this statement. In many of our dealings with associations, they are utilizing larger workstations and private offices and usually have a higher percentage of private offices than a traditional corporate office environment. Due to each work space having a larger footprint, a less efficient square footage per person is realized. In addition to this, many associations are more paper intensive than other organization types, and they often take pride in celebrating the history of their organization and thus retain paper copies of periodicals and other trade magazines and research work.

Berger: This comparison varies based on what user-type they are compared against. Versus technology clients, associations are commonly

less efficient. They are comparable to financial services but are more efficient than law firms.

Potokar: Associations tend to fall higher on the scale of square feet per employee than many other corporate offices, just shy of law offices and financial corporations. More often than not, they require a higher ratio of built offices to open workspace. Some associations have yet to let go of larger workstation footprints that other client types are comfortable reducing.

FORUM: Do you see any difference in the way associations are approaching their workplace strategy today versus five years ago?

Potokar: Associations are incorporating more collaboration spaces than they had before. As offices adapt to newer technology, it's easier for employees to work away from their desk. Giving employees the option of choice in where and how they work has been a trend among most corporate clients and is making its way into association design.

Pisone: Yes, they are aware of the direction that workplace design is moving and want to be a part of it. Most are making better use of collaboration areas. Some associations are reducing the percentage of staff within private offices and looking for efficiencies in other areas (storage, paper, etc.).

Berger: This question cannot be answered universally; some clients are moving to a more mobile work style, while others are sticking with a 'traditional' approach with office-heavy settings with L- or U-shaped stations.

“Association headquarters will look different going forward, with the result being new and exciting headquarters spaces that enhance the organization’s brand, attract and retain talent and support the mission.”

FORUM: In your recent association projects, how have these groups looked at workplace strategy and how are their new spaces different from their previous space?

Berger: The innovators—those who are embracing new ideas in workplace strategy—are in the minority when it comes to association office design. Most are holding fast to larger assigned workstations, with a comparatively greater proportion of people retaining offices. There are fewer association clients looking to be on the leading edge of space utilization benchmarks.

Potokar: Recent projects have shown association clients reducing workstation footprints. In taking that space away from employees, we encourage clients to give back by incorporating more informal collaboration spaces, whether it be phone rooms, huddle rooms, open collaboration areas in the open office or cafés with ample seating options. These types of spaces allow employees to find a spot to meet away from their desks.

Pisone: We have noticed that the associations are recognizing technology and making it an important factor in their space usage with more technology driven meeting spaces.

FORUM: How does the association’s brand factor into the design of the new space? What are the most interesting things you have done in your association clients’ space design?

Pisone: The brand of associations comes into play with the design. It has rarely been a direct interpretation, but more realistically it is a fluid dialogue between the brand and the architecture,

and a recognition and celebration of the association’s history. For some clients, we have highlighted this through a gallery wall leading to their library and for others, more recently, this recognition has taken the form of a digital celebration of history and branding. For some associations, their donor recognition is an important value to emphasize. In one case, we created various locations for identifying donors at different levels such as stone thresholds at the boardroom with engraved names, removable horizontal metal strips with etched names in the elevator lobby, and applied frosted glass distraction markers holding the names of donors. Each location had a different donor level associated with it.

Berger: The most common brand solution is one where the ‘brand’ is identified by the history of the organization. Attention is drawn to things such as founders’ walls and past president recognition. We worked with one client that transitioned all of their employees to a laptop/tablet environment, thus requiring a design that created multiple spaces for meeting and interaction. A new CEO coming from a corporate background led the charge to include employee amenities and opportunities for team interaction that was significant departure from their previous office

Potokar: Incorporating brand design is an easy way to enrich a workplace and celebrate a company’s culture. Whether it is through environmental wall graphics, murals or 3D sculptures, branded elements can build upon the mission statement and culture of an association, and bring the brand’s unique personality to life. Understanding culture is important to not only attract potential recruits and new members, but also to instill value and retain pride among employees. For associations with a clear mission, it’s important for their employees to know they are part of that mission.

FORUM: Shared spaces are important to many associations. How are board rooms, conferencing and other common spaces being designed today?

Potokar: Shared spaces need to be the hardest working spaces in the office, serving a multitude of purposes from everyday tasks to conferences to post-work events. They need to be designed with flexibility in mind, as well as integrating technology as seamlessly as possible.

Pisone: The board room is still a relevant space in association design. As much as associations try to encourage staff to utilize this space for internal meetings, there is still a stigma of formality inherently coupled with the “board room.” Thus, other conferencing spaces and styles are being provided throughout (for both spontaneous and planned meetings).

Berger: Multi-purpose rooms, to allow for all-staff meetings, are still very common for association users. These large rooms are handled either within the client’s own space, or in a building common space. Technology is being updated where large flat screens are replacing projection screens. Where association users are behind the trend is in smaller meeting spaces for employee and team collaboration. This is improving, but still has a way to go to catch up with some of the industry benchmarks.

FORUM: Not all association staff members are assigned private offices. How do you determine the appropriate workstation size and layout for your association clients? What is typical today?

Pisone: Finding a common ground within each organization is key so that the space can grow in a flexible fashion. Typical sizes that we are seeing within associations are still larger (at 60 square feet) than the national average (at 36 to



48 square feet).

SmithBucklin offices

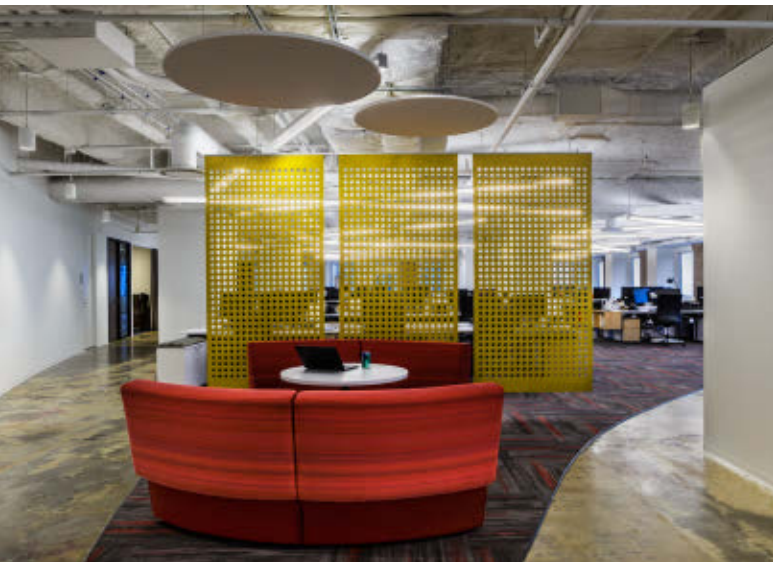
Berger: Private offices remain more in this industry than in others. With that said, overall workstation size and footprint are getting smaller than five years ago, which is to say that they are catching up with where other industries have been during that time. Workstation panel height is finally coming down from a standing-privacy height to seating-privacy height, or lower.

Potokar: There’s not necessarily a one-size-fits-all answer here. It is most important to program with the specific client to understand how their operation works, what tasks employees perform and how much storage they need. More and more companies are going digital with filing, which reduces storage needs at individual workstations. In that case, a 6’x 6’ or 5’x 6’ are appropriate sizes for workstation footprints.

FORUM: Construction and other project costs have risen greatly during this current real estate cycle. What budget challenges do you see when designing an association’s space?

Pisone: While every project has a budget, the perception of money spent is a key factor with association design. As the membership (the recognition of, the perception by and the utilization for) of the association is the foundation of the organization, it is always important to show respect with the dollars that are utilized.

Potokar: Designing to a budget will affect the design, but it doesn’t have to affect the impact of the design. We have found that designating areas of priority in terms of finishes and specialty features is one way to maintain high impact in



AMA offices

shared spaces, while balancing the budget out with more simple moves in the work-space.

Berger: Leadership at associations commonly

come from, and have an appetite for, higher-end finishes, either based on the office they came from, or from the expectation of the industries they serve. Addressing costs for desired programmatic elements or finishes thus needs to be addressed early in the programming and design processes so expectations can be set and project parameters properly defined.

FORUM: What other trends do you see affecting the design of association office space?


Potokar: Hospitality is making a move into workplace design. Whether a concierge-style reception or meeting spaces that feel more like hotel lobbies, workplace design is taking cues from coffee bars and hotels alike. This could impact how associations think about their connection to their members—maybe they become a “third place” for their members to escape to from their own office. Wellness is also an important trend and an extension of the sustainability movement. As designers, we not only have a responsibility to the environment, but to the individuals who spend 40 to 80 hours a week in their place of work. Height-adjustable desks, wellness rooms, and access to daylight and nature are easy ways to start to incorporate this trend.

Pisone: While individual private offices are still relevant within association design, we are seeing a reduction in the quantities of private offices as well as an openness to relocating those offices

away from the perimeter glass line of the building. The shared spaces of the office, such as the café, multipurpose rooms and libraries, are utilized a greater level, but this is also due to a stronger focus on mobile technology. Each of the trends we are seeing with association design are directly following the trends of corporate office design, but at a more conservative rate of change.

Berger: Paper storage and retention is still a driver of the use of space. Those sticking with a traditional model are “hanging on” to paper, while flexible environments are looking for ways to handle paper digitally. Those that can embrace the digital solution prepare their organization to be able to welcome the workforce that is asking for a more dynamic and fulfilling environment.

As these professionals shared, the association community is collectively looking at ways to use office design to maximize their ability to pursue their organizations mission. Architects are encouraging the use of workplace strategies found in the corporate world to their association clients. Associations have been slow to embrace these strategies, yet there is change in the way headquarters space is designed. Private spaces are getting smaller, there are more areas to support collaborative efforts and branding has become an essential part of office design.

As more baby boomers are retiring and a new generation assumes leadership, the association community is adapting more of the new design paradigms seen in other industries. Technology and the way people want to work will be additional factors that serve as drivers of change for associations' offices. One thing is certain: Association headquarters will look different going forward, with the result being new and exciting headquarters spaces that enhance the organization's brand, attract and retain talent, and support the mission. 

Gregg F. Witt, SIOR, is senior vice president at CBRE, Inc. He can be reached at gregg.witt@cbre.com.

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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 whether hosting a mentoring program is right for your association and how to build one.

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.

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.

MAY
23

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

H. Stephen Lieber, CAE, will 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; ensure a product portfolio and business strategy aligned with target customers that drive greater engagement; and establish management and governance cultures supportive of entrepreneurship, transformative business models, and nimbleness.

APRIL
26




Join us!

2018 Woman of Influence Reception 5:30 - 7:30 p.m.

Association Forum is pleased to announce Dawn Sweeney, FASAE, president and CEO, National Restaurant Association as the inaugural 2018 Women's Executive Forum: Woman of Influence.

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.



Register Now!

**MAY
30**

Marketing SIG
9 – 10:30 a.m.

**MAY
31**

The Volunteer Relationship: Engagement and Support
9 a.m. – Noon

Through a two-part interactive workshop, you'll learn critical elements of a volunteer relationship system, participate in a series of simulations to enhance volunteer and staff effectiveness and have an opportunity to discuss successes and challenges. Part one will be the in-person program. Part two will be a 90-day virtual check to discuss lessons learned, success stories, lingering challenges and potential solutions.

June 2018

**JUNE
12**

IT SIG
9 – 10:30 a.m.

**JUNE
20**

Component Relations SIG
9 – 10:30 a.m.

**JUNE
21**

Attendee Acquisition Roundtable
8 a.m. – 4:30 p.m.

Want more attendees at your events? Share best practices with your marketing peers, brainstorm challenges and exchange ideas over the Attendee Acquisition Roundtable Study by Exhibit Surveys.

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● Webinars

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Promotions and Changes



Million Dollar Round Table (MDRT) has named **Barbara A. O'Connor** as its managing director, effective March 19. She is a veteran association executive with more than a decade of experience in association management. Prior to joining MDRT, O'Connor was a Director at SmithBucklin, where she served as executive director of the Forum 400 and executive vice president of the Print Services & Distribution Association. The role of managing director is a new position at MDRT. O'Connor will take an active role in organizational strategy at a time when the company is expanding in both membership and new initiatives.



Jaquelyn C. Bode has been appointed executive director of the American Association of Orthodontists Foundation (AAOF), the charitable arm of the American Association of Orthodontists. The organization, a 501(c)(3) not-for-profit corporation, provides support to orthodontic education programs and orthodontic research. Previously, Bode was the executive director and senior development manager for the Christian Hospital Foundation, where she created a highly successful annual giving program.



Lorelle R. Swader has been named the associate executive director of the American Library Association Offices and Member Relations, as well as the ALA-Allied Professional Association. Swader joined the ALA in 1992 after holding a variety of positions in libraries. She has also served as an adjunct professor at the Graduate School of Library Science at Dominican University. For the past year, Swader has been the chair of the Welcoming Environment Ambassadors Committee for Association Forum.



The American Veterinary Medical Association (AVMA) has named **Dr. Matthew J. Salois** as director of its Veterinary Economics Division. Prior to joining AVMA, Dr. Salois was the director of global scientific affairs and policy at Elanco Animal. He previously worked for Florida Department of Citrus as chief economist. Dr. Salois replaces **Dr. Michael R. Dicks**, who is retiring.



Roy Jackson has joined the National Restaurant Association as executive vice president of development and industry relations. Jackson previously retired after more than 20 years in leadership positions at the Coca-Cola Company, where he most recently served as senior vice president, business development & industry affairs for Coca-Cola North America, Foodservice and On-Premise Division. He currently serves as chairman of the Board of Advisors for the Multicultural Foodservice and Hospital Alliance.



Ralph DeVitto has been appointed President and Chief Executive Officer of the American Brain Tumor Association (ABTA). DeVitto has decades of experience in association management, serving in a number of leadership roles with the American Cancer Society (ACS) over the course of his 21 years with the organization. He most recently oversaw the reorganization of the Southeast Region of the ACS as the Interim Executive Vice President of the region.

News and Awards



Raymond Herrick has been awarded a lifetime membership to Association Forum. At the end of March, Herrick retired from his role as executive director emeritus for the Foodservice Equipment Distributors Association after 35 years with the Elgin-based organization. He has been a member of Association for nearly his entire four-decade career in the industry, first joining in December of 1981.

New Association Forum Members

Individual Members

Robyn Ann Kurth, Society of Gynecologic Oncology

John Bellotti, National Association of Tax Professionals

Alexander "Robb" Clawson, Air Movement and Control Association International

Marc Abila, CAE, Illinois Chiropractic Society

Ozelle L. Hubert, Student

Rachel Johnson, Travel Tacoma

San Spears, Alternative Schools Network

Tim Murphy, Breakthrough Technologies

Forum Plus Members

Michelle Gehrke, ABSA International

Laura Ellingsen, Tom Felgar, Lara Graf, Kerry Myers, Jeff Pins and **Lauren Walsh**, American Academy of Dermatology

Corrie Rasz, American Academy of Implant Dentistry

Constance Schmidt, American Academy of Pediatrics

Beth Blyler, American Association of Nurse Anesthetists

Mary Borysewicz, Alexis Curtis, Valarie Eyssen, Judy Friend, Matt Grady, Karen Hart, Kathy Hinshaw, Alix Katznelson, Alisa Lockhart, Melissa McMaingle, Adriana Menezes, Betsey Palmer,

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Evelyn Alexander, American Specialty Toy Retailing Association

Camilla Bontogon, Sanjin Cancar, Fred Conte, Adam Halon, Sarah Johnson, Laurence King, Yadira Laboy, Joseph Leyhane, Kelsey Makkay, Carl Milbourne, Luz Mosquera, Erika Nelsen, Michael Ogle, Lucia Orozco, Jennifer Proctor, Elizabeth Rennie, Ian Smith, Michelle Smith and Miakka Wood, APICS

Gloria Colon, Alberta Johnson, Sarah Lombardi, Jonathan Thatcher and Kimberlee Williams, Appraisal Institute

Laura Chmielewski, Sarah Dittmer, Rob Frey, Sonya Jones, Meghan McLaughlin, Sergio Miranda, Monica Moore, Mary O'Keefe and Deb Woodall, Association Management Center

Becky Garrido, Association of Legal Administrators

CJ Nelson, Association of Nutrition & Foodservice Professionals

Rick Church, CM Services Inc., The Association Partnership Company

Katrina Ceci, Emergency Nurses Association

Shauna Barnes, Ginger Czajkowski, Sofia Dorsano, Cindy Lemek, Brian Mondragon-Jones and Mary Riordan, Executive Director, Inc.

Philip Levin and Kristi McCotter, Magnificent Mile Association

Elizia Artis, Keishia Jones, Michelle Omansky, Casey Smith and Kaylee Williams, SmithBucklin

Laura Lewis and Rebecca Pomazak, Society of Critical Care Medicine

Michael Greco, The Executives' Club of Chicago

Noemi Corral and Callie Matheny, Urgent Care Association of America

Kelley Thompson, Water Quality Association

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Digital Extra

To access *Convene's* "27th Annual Meetings Market Survey," visit the digital or mobile versions of *FORUM*.

A Rising Economy, But Challenges Remain

PCMA has released *Convene's* 27th Annual Meetings Market Survey and the results show that the meetings industry continues an upward trend that mirrors the growing economy, though concerns around political and environmental factors have created new challenges for planners. The percentage of respondents who reported that one or more attendees struggled with visa issues rose from 58 percent in 2016 to 83 percent in 2017. Conversely, only 34 percent of planners said they would be holding meetings outside of the United States, representing a significant two-year drop from 50 percent in 2015.

The survey shows a positive increase in the number of meetings planned, with 33 percent expected to hold more meetings in 2018, and while the respondents indicated increases to number of exhibitors, the overall exhibition space has shrunk by 20 percent (though *Convene* notes this may be attributable to different respondent groups). Planners continue to be tasked with cutting expenses, with food and beverage and A/V being the top areas in which those decreases are expected to occur.

NUMBER OF EXHIBITORS

Almost one-half of respondents (49 percent vs. 53 percent in the 2016 survey) indicated that they had **at least 100 exhibitors at their largest show in 2017.**

151

Average number of exhibitors in 2017

YEARLY AVERAGE, 2007-2016

2007	163	2012	184
2008	163	2013	183
2009	173	2014	160
2010	167	2015	172
2011	168	2016	181

POTENTIAL INTERNATIONAL DESTINATIONS

International destinations that respondents are most likely to consider:

Canada 71%
(for U.S.-based respondents)

Western Europe 44%

United Kingdom 44%

Asia 44%

South America 36%

Australia/Pacific Rim 31%

Caribbean and Bermuda 26%

Mexico 25%

Eastern Europe 23%

Africa 20%

FUTURE INTERNATIONAL MEETINGS

34%

will be holding meetings outside of the U.S.

Thirty-four percent of respondents (down from 43 percent in the 2016 survey and 50 percent in the 2015 survey) reported that they will be holding meetings outside the United States in the future.

YEARLY AVERAGE, 2007-2016

2007	43%	2012	39%
2008	43%	2013	42%
2009	44%	2014	47%
2010	48%	2015	50%
2011	40%	2016	43%

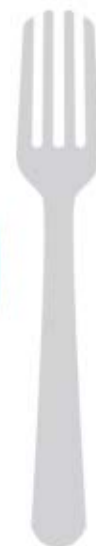
EXPENSES

63%

were asked to cut food-and-beverage expenses in 2018

Average meeting expenses

29%	Food and beverage	3%	Shuttles/transportation
17%	Audiovisual	2%	App development
8%	Decorator/labor	2%	Destination management
6%	Marketing/promotion	2%	Security
6%	Registration housing	2%	Wi-Fi
6%	Space rental	1%	Insurance
6%	Staff travel and accommodations	1%	Virtual/hybrid production
5%	Speakers and entertainment	5%	Other



Source: *Convene's* "27th Annual Meetings Market Survey"

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