

FORUM

JUNE/JULY18 V102 N5

INFORMING & INSPIRING
ASSOCIATION
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Podcasting for Associations is

EXPLODING!



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Bottom Line—Through
Effective Fundraising

The **Four Cs** of Association Content



How to amplify your organization's
industry intelligence

By Jason Meyers
SmithBucklin Content

A

Associations exist to advance and elevate their members and their work. They accomplish this by providing valuable educational resources, professional networking opportunities, and relevant industry intelligence.

It's the last deliverable—relevant industry intelligence—that should form the foundation of an association content strategy. While every organization's approach will be customized based on its mission and goals, the common thread is the collective knowledge and experience of members. Associations' members are embedded deep within their industries,

giving them expert insider perspectives. The role of association content is to amplify that intelligence.

Associations are antidotes to fake news

The world of business content is confusing. There are too many sources. Everyone is an expert, or proclaims themselves to be. There are no filters—no checks and balances. There is a need for intelligent, authoritative, and useful content that can:

- Track and analyze critical relevant trends.

- Engage and educate industry professionals.
- Elevate the voice of members as industry experts.
- Position associations as thought leaders.

Associations are repositories of relevant, authoritative information that's not collectively available anywhere else. With the right content strategies in place, they can become recognized resources of industry intelligence for professionals.

Amplifying industry intelligence

Deciding on the right mix of content categories is one step in the process. Associations also must determine the best ways to package and convey that intelligence to their audiences. Important considerations include:

- Do the organization's members prefer to consume content online?
- Is there a unified content brand that aligns with the association's mission?
- What content formats should be considered (written, graphic, video, audio, etc.)?
- What role will email and social media play in content distribution?
- Will content be available to members only, or will it be accessible by everyone?
- Will advertising opportunities be provided on any content platforms?

Taking the right steps to developing and implementing comprehensive, customized, and targeted strategies can help associations become trusted providers of authoritative, relevant content. By doing so, they will enhance their value to professionals and establish their organizations as go-to resources of industry intelligence.

ANATOMY OF ASSOCIATION CONTENT

There are several core components to an association content strategy. These **"four Cs"** are categories of content that contribute to a successful strategy:

1 CREATED

This is content that's unique to a given organization. Typically, it is created by content specialists on an association's staff or provided by freelancers who are subject-matter experts. It may be an article or podcast adapted from a conference or a commentary piece that provides valuable insight on a trending industry event. Creating intelligent, informed, relevant content helps highlight the authority and authenticity of an organization.

2 CONTRIBUTED

Contributed content comes from the minds of members. It can take many forms: Member Q&As, bylined features provided by members, opinion pieces, roundtable discussions, and much more. Leveraging and channeling the collective intelligence and experience of an organization's members not only informs and educates the audience, it also elevates both the individual contributors and the association.

3 CURATED

This is content from third-party sources that is cultivated and filtered by an association's content experts. In its ideal form, curated content doesn't just provide a recap of news and trending events—it gives context, analysis, and insight into why the information is relevant to the association's audience. Providing the association's take on content from other sources helps cut through the noise and signals to industry professionals what is most relevant.

4 CUSTOM

Custom content is provided by an association's industry partners and sponsors, typically for a fee. It should be clearly delineated from created, contributed, and curated content, and it should be educational and non-promotional. Custom content not only gives associations additional channels for delivering expert insight, it also provides a source of non-dues revenue.



SmithBucklin Content positions your association as an authoritative source of timely, relevant, comprehensive, and engaging industry intelligence. With offerings that include online content hubs, white papers, and daily newsletters featuring curated industry news, SmithBucklin Content is your partner to amplify your organization's voice; engage members, non-members, and sponsors; and achieve your strategic priorities. Start amplifying at content.smithbucklin.com.

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On the Ground at digitalNow 2018

At digitalNow 2018, the theme was Digital Transformation, a concept that is much deeper than simply the technology you use. Association Forum was on the ground at the conference to find out how associations can prepare and enact digital transformations that will help to build sustainability in their business models. Our own intrepid reporter, Melissa Walling, CAE, spoke with presenters from the conference about the future of technology and education in associations.

20 CASE IN POINT

Disengaged and Confused: Improving the Identity of Your Brand

Quick: What is your organization's brand? If you answered with a list of colors or the shape of your logo, you might need to take a stronger look at your brand. According to Michael D. McGuire, president and CEO of 88 Brand Partners, "Your brand is your DNA." It's how your members feel about you, it's the voice of your messaging and it is the personality reflected through your communication vehicles.

28 BIG PICTURE, ASSOCIATION FOCUS

Podcasting for Associations is Exploding!

In the 1967 film "The Graduate," the lead character is bestowed a piece of advice in a single word from a family friend: Plastics. If you remade that movie today specifically for association audiences, that advice might very well be Podcasts. Of course, such a project would have trouble getting green-lit, but in its absence, these five organizations recommend that if you aren't currently engaging with your members through audio programs, you should be.



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ASK THE EXPERT

Some Pros and Cons of Arbitrating Employment Disputes

The United States Supreme Court recently held that arbitration clauses in employment agreements may require employees to pursue employment disputes in individualized arbitration proceedings, rather than as a group through a class action lawsuit. Paul M. King, an associate with the Chicago law firm Funkhouser Vegosen Liebman & Dunn, Ltd, walks through some of the positives and negatives of arbitrating employment disputes.

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ASK AROUND

The Rewards of Philanthropy: How Your Organization Can Strengthen Its Mission—and its Bottom Line—Through Effective Fundraising

Associations are paying increased attention to the development and fundraising efforts of their philanthropic subsidiaries these days. Rob Paterkiewicz, CAE, recently oversaw a planning study for his organization, Selected Independent Funeral Homes. Rob sat down with the team from Consultants in Association Philanthropy for in-depth discussion about fundraising, foundations and finding support in those efforts for an association's programs and projects. For more on this topic, check out our companion interview on the CEOOnly Podcast.

Digital Extras

Access this issue's bonus content on your mobile device:



- *American Association of University Women* "Deeper in Debt: Women and Student Loans"
- *The Association Role in the New Education Paradigm* white paper

Download the app! Search "FORUM Magazine" on iTunes, Google Play or Amazon.

Correction:

In the Education Calendar of the May issue of FORUM, the start and end times for the Exhibit Sales Roundtable were incorrectly listed. The program begins at 8 a.m. and concludes at 4:30 p.m.

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Changing the Conversation: Nadya Okamoto

It's no secret that graduates of Harvard often go on to lead groundbreaking and influential movements, but when Nadya Okamoto arrived on campus as a freshman, she had already checked that achievement off the list as the founder and executive director of the PERIOD, a hugely successful women's health non-profit. PERIOD is a 501(c)(3) organization that provides menstrual products to homeless women, in addition to providing education and advocacy as part of a growing movement to normalize and remove the taboo of menstruation.

During her freshman year at Harvard, Okamoto ran for City Council in Cambridge on a progressive platform, using a combination of social media savvy and old-fashioned knocking on doors to get the word out about her campaign. She ultimately lost the race, finding that her youth caused trepidation among prospective voters. Despite the loss, she saw it as an opportunity to demonstrate what America's youth are able to accomplish. "I think you need to be unapologetically yourself and focus on the work that you're doing, because the end of the day our goal was to just knock on doors, talk to residents and show people what we are capable of and what we were trying to do."

PERIOD not only provides women's health products to women in need, but also strives to educate and advocate for menstrual awareness. In 2017, the organization put on its first annual conference, PERIOD CON. "It's really exciting to see the bring the movement to life in a space for a couple of days every year," Okamoto said. "As an activist community, I think it's really important to unify our brand, unify our voice and being able to do that [through PERIOD CON] has made a tremendous difference."


Okamoto's dedication to helping those in need and her ability to rally others behind the cause isn't an anomaly for those her age. Generation Z, which is now the largest generation in history, shares many of the qualities of Millennials—they are entrepreneurial, altruistic and thrive on idealism—but what sets them apart is their pragmatism. According to research from The Center for Generational Kinetics, 77 percent of Generation earns their own paycheck through some level employment and 12 percent have already started saving for retirement. They're smart and practical, and they aren't going to wait for permission to make a difference.

"I have a lot of pride in being called Generation Z," Okamoto says, "because we have been able to be the change-makers. There's a saying that I keep hearing among the young activist community

that 'Generation Z doesn't want a seat at the table. They want to flip the table.'" She spends a lot of time pondering and speaking about the power of Generation Z. She recently returned from a speaking tour on the subject that took her to LA, New York and London. During the course of our interview, she offered to send me studies on generational divides because, as she says, "I'm very obsessed with the research around this."

It's easy to draw comparisons between Generation Z and the Baby Boomer generation that marched for civil rights and against war in the powder keg of the 1960s. The difference is that the tools this generation has to work with empowers them to get started and make actionable change. They can use the resources of a connected world to find out how to incorporate their nonprofit or reach out to like-minded individuals and build a community around their platform.

For PERIOD, Okamoto sees the community aspect of the movement as a growth opportunity. The organization seeks to empower those who want to get involved by providing them the means and structure to grow the movement and enact positive change in their cities and on their campuses.

"PERIOD is in a scaling stage now," Okamoto says. "We're really focusing on not only continuing to expand our chapter network, but also on deepening the impact of all our chapters in our local communities—making sure that we're distributing and meeting the needs of our communities. We're also now working in policy on campuses and then mobilizing from a local to the federal level to bring period products for people that need them." 



Nadya Okamoto
Founder & Executive Director
PERIOD

Nadya Okamoto is a social entrepreneur and activist. She is the founder and executive director of PERIOD, a nonprofit organization that provides women's health products to those in need. She is currently a sophomore at Harvard University. Okamoto was the closing keynote speaker at Forum Forward 2018.

Dan Shea is the publications and content manager for Association Forum. He can be reached at shea@associationforum.org.

Networking in the Suburbs

Forum After Dark | May 23, 2018 | OLC Education & Conference Center

On May 23, 2018, over 90 association professionals and supplier partners joined Association Forum at the OLC Education & Conference Center in Rosemont for a rousing suburban edition of Forum After Dark, complete with red, white and blue snacks catered by Blue Plate Catering.

Forum After Dark is a quarterly networking event for Association Forum members and invited guests. The concept was introduced a few years ago based on feedback from members that they longed for more in-person events to meet other professionals in the community. Recently, Forum After Dark has begun alternating between downtown and suburban locations.

Networking continues to rank high as a member benefit for associations, even as priorities shift across generational lines. For example, the need for public policy updates has dwindled, while younger members see increased value in professional development. However, the desire for face-to-face communication with other members and the feeling of belonging into a community appeals to all ages and levels of professionals.

"The May 2018 Forum After Dark gathering was great and afforded the opportunity to connect with new people, as well as see current friends," says Burt Blanchard, director, member recruitment and

sales development for the Council of Supply Chain Management Professionals (CSCMP). "There is no local community that does it better than the Association Forum!"

Many of the attendees at Forum After Dark also attended the Education SIG earlier that day at OLC entitled "L3: The Future of Membership and Engagement." For more on the takeaways from that enlightening session, turn to page 12 for a synopsis by SIG presenter Dr. Sue Tinnish.

The next Forum After Dark will take place on September 26 at SmithBucklin. Forum After Dark will be back in the suburbs in January 2019. Stay tuned for more details!



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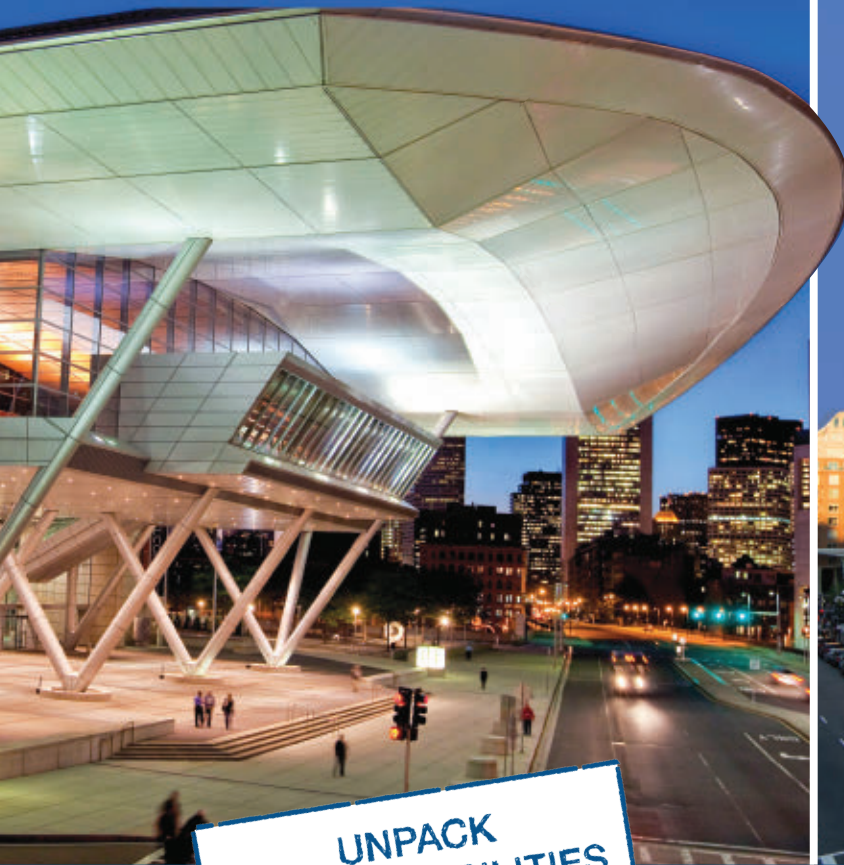


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CEO to CEO:

An Interview with Deborah Bowen, FACHE, CAE

By Michelle Mason, FASAE, CAE

At Honors Gala 2018 on June 28, Deborah Bowen, FACHE, CAE, was awarded the Samuel B. Shapiro Award for Chief Staff Executive Achievement, the highest honor that Association Forum bestows upon an association professional. This isn't Bowen's first time being recognized by Association Forum—she was the recipient of the Association Professional Achievement Award in 2000. Bowen has been a leader in the association industry for over 25 years, including as CEO of the American College of Healthcare Executives (ACHE) since 2013.



Deborah Bowen, FACHE, CAE
President and CEO
American College of
Healthcare Executives

Bowen has spent most of the last 25 years in leadership positions at ACHE, in addition to three years as the deputy executive director for the Society of Actuaries.

Association Forum president and CEO Michelle Mason, FASAE, CAE, sat down with Bowen to learn more about her journey as an executive and her thoughts about the industry to which she has dedicated her life.

FORUM: What does receiving the Shapiro Award mean to you?

Deborah Bowen: The opportunity to be recognized by your peers is a great honor. I have great respect for the executives in this field, their passion and their commitment to make a difference. Some of the best and brightest have been honored by Association Forum—and while Forum is a regional organization, these leaders have made their mark nationally and even globally. That being said, I am also mindful that many others are doing great work and while they may not have the opportunity to stand on the stage this year, they are all award winners to me.

FORUM: As a trailblazing executive in the association community, how do you manage success?

Bowen: I am not sure I would consider myself a trailblazer. I have always tried to do my best work regardless of the task. I have had the good fortune to work for mission-driven organizations that I believe in. Believing in your work makes it easier to go beyond the task and see the opportunity beyond what is expected. While I have made mistakes, I believe it is the responsibility of leaders to make sure they do not rest on their laurels and look for ways to grow and improve.

FORUM: What are the biggest changes to the association industry you've seen over your career?

Bowen: I have been in this business a long time and I think the biggest paradigm shifts have been around adopting more of a business, entrepreneurial mindset. Some of the most successful examples of large-scale growth have come from those who reinvented their mission for greater impact or identified a need not being served. Paradigm shifts have also been the catalyst for expanding product offerings beyond traditional views of member audiences to thinking more about reach and impact. For some, the global market has redefined the marketplace and of course technology has provided the added means to expand reach and customize experiences. All healthy shifts from my perspective.

FORUM: What piece of advice would you give to young, emerging leaders looking to make their mark on the association industry?

Bowen: As an organization that represents the life cycle of healthcare leaders, we are very focused on helping emerging leaders understand themselves as they plan their careers. Understanding your values, knowing where you want to have an impact and taking an honest inventory of what is helping you (strengths) and holding you back (development needs) is key to success. The latter is the most difficult as no one wants to believe they are a work in progress. But in reality, we all are. No matter where you are in your career, if you are not working on some aspect of your leadership skills, you are not growing.

“Understanding your values, knowing where you want to have an impact and taking an honest inventory of what is helping you (strengths) and holding you back (development needs) is key to success.”

FORUM: What piece of advice have you received in your career that has helped you as a leader?

Bowen: Step out of your comfort zone to learn and grow. For each of us that means something different but we each know where we get the most uncomfortable. Working through that can be very empowering and makes you a better person and a better leader. I am also a big believer in executive coaching and I have worked with one since 2011.

FORUM: What do you view as the most rewarding accomplishment of your career?

Bowen: Being experienced means I have had the opportunity to do a lot of things of which I am proud. Most recently, the most rewarding might be being awarded the Illinois Performance Excellence Gold Award for Achievement of Excellence. Being on a Baldrige journey is hard work that involves everyone in the organization. However, the process has made ACHE a better organization—more grounded in the purpose of our work, more focused on customers, and more systematic about measuring data to improve results and impact.

FORUM: What major change do you anticipate coming to the association industry over the next five to ten years?

Bowen: If I had a crystal ball I would be very wealthy. I think the hardest thing for association leaders to do today is to manage the change and try to anticipate the unforeseeable. I do not believe one single trend will rule. That is why being a good student of your customers and market, and being adaptive and responsive to new requirements is key.

FORUM: How can associations stay nimble in the face of constant disruption to the industry?

Bowen: Adopt agile practices, pilot and experiment, fail fast, learn fast and move on.

FORUM: How has Association Forum helped you to achieve your career goals?


Bowen: I had lots of great volunteer experiences at Forum. The opportunity to give back to the community and meet great professionals is very rewarding. A great network for support and learning that help

you with your job today and the job you may want next. Of course, as many readers know, I took networking to a whole new level when I met the love of my life, Norris Orms. As two past Forum chairs, we are now 19 years into our relationship. I would say my membership dues paid off beyond the typical member.

FORUM: ACHE has had only three presidents since 1979. How do you credit the organization's ability to bring on and maintain strong leadership?

Bowen: The board/staff culture is the secret sauce that makes ACHE tick. We share the same values and commitments to serve our mission. To hardwire that, you need good governance, solid practices and clear expectations to achieve strategic and operational priorities. Of course, trust is earned, and you do need to execute well. That is why I am so proud of the work of our great professional staff who achieve our goals with dedication and heart.

FORUM: If you had one wish for the association sector, what would it be?

Bowen: In today's climate, I believe the work of associations is more important than ever. While it can be easy to become discouraged by challenges, I hope every association leader is optimistic about the future and realizes their full potential to effect positive change. I truly believe we make a difference. 

Michelle Mason, FASAE, CAE, is the president and CEO of Association Forum. She can be reached at executiveoffice@associationforum.org.

Talley Management Group Expands Its Global Reach to India

At IMEX 2018, Talley Management Group (TMG) and Plan it! Meetings & Conferences India announced a partnership that will help build a bridge between the US-based association industry and its counterpart on the Indian subcontinent. The venture is called Vraata and its mission is to offer association management services to both international associations looking to build a presence in India and developing associations within India.

It's plain to see why India represents a great opportunity for growth potential in this type of venture. The World Bank has rated India as the world's fastest-growing economy and third largest economy overall. At 520 million people, its active labor force is nearly as large as the total population of North America. In the past 30 years, the Indian government has focused its attention on education reform, raising its literacy rate by nearly 50 percent and increasing post-secondary education opportunities with the addition of 20,000 colleges since 2001.

The association industry itself in India is well-established. There are number of industry and trade associations that date back to the 19th century, including the Confederation of Indian Industry, the Indian Tea Association and the Indian Institute of Architects. In the decades that followed India's independence in 1947, the number of professional organizations increased dramatically.

FORUM spoke with the president and CEO of TMG, Gregg Talley, CAE, on how Vraata came to be, the future of the endeavor and the power of associations to strengthen growing economies.

Why did TMG decide to pursue expanding its international footprint?

Talley: A good third of our clients are doing business globally. That really forced us to learn, and meet people and get to know the markets where our clients want to do business and be involved. Those places include Asia-Pacific, Europe, Latin America, Africa and the Indian sub-continent. We started looking to see where we could find support for what we wanted to do.

What led you to identify India as the best place to expand your global reach?

Talley: As we started looking at our business and where we felt there was potential to grow in the future, we took a look at where corporate America is starting to focus and where that money is being spent. No surprise, it's in the countries and regions of the world that are growing and becoming more middle-class. India is at the top of that list.

There's been a tremendous change from poverty to middle-class in India, as well as a young, highly educated workforce. That's a natural expansion for the association community. Our colleagues also think the market is ripe for an association management company to provide outsource services or full-service association management to growing Indian national associations.

What made Plan It! the right partner for this venture?


Talley: We had created a relationship with Plan It! around some of our big client events. So, we actually had a history of working with them. It really made sense on multiple levels. It certainly helped that we're a 31-year-old, family-owned business and they're a 40-year-old, family-owned business. We're both second-generation business owners who learned from our parents and have similar business ethics and a similar world view. That made it really easy to move down this road.

What is the association industry in India currently like?

Talley: There are a number of global and U.S.-based associations that have been doing business in India for quite some time. There's a presence there from U.S. associations and then there is a national association marketplace that exists in India right now. Many of the licensed professions and major trade associations that you would expect in a developing economy already exist. So, there is a culture of non-profit organizations doing the same sort of education and community-building that we see in North America or Europe.

What is the potential for the association industry to help build and bolster a growing economy?

Talley: Huge. When you look at adult education in general, I think it's fairly well-established that after college and universities, it's associations that are providing adult learning on an ongoing basis for people in their careers. The global or national exchange of knowledge helps elevate whichever field or industry, whether it's a trade or professional association that is represented.

We know what associations can do in terms of increasing education and knowledge, as well as plugging into the global network in any of those industries where there are global organizations or other national organizations for the exchange of knowledge, the exchange of contacts and the potential of bringing investment. We know what associations have done over the years in the developed world and we know those represent opportunities in the developing world as well. 

For more information, visit www.vraata.com.

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L³ for Education, Engagement and Value

By Sue Tinnish, PhD

On May 23, at the OLC Education and Conference Center, Association Forum's Education Program Development Shared Interest Group (SIG) held a session entitled, "L³: The Future of Membership Education and Engagement," presented by Sue Tinnish, PhD. Dr. Tinnish, a recognized thought leader in the field of education, described how lifelong learning (L³) creates opportunities for associations to rethink what type of education they offer, how people learn, and new contexts for learning.

L³ is a holistic and long-term view of education. People learn throughout their lifetime and they learn in formal, non-formal and informal settings. Lifelong learning is user-centric; it focuses on knowledge that people need to be more productive in their personal and professional lives. Lifelong learning involves real contexts and authentic settings.

Lifelong learning should be a focus for associations for three reasons. First, while the world is always evolving and changing, fundamental changes are occurring that affect economies, industries, and the way we conduct business. Associations should closely examine the external forces that are affecting and will affect their worlds including social, economic, environmental, political, legal, ethical, and technological forces.

The media inundates us with information about technological changes—robotics, artificial intelligence, big data, shifting of information to the "cloud," and Industry 4.0. These factors influence the need for lifelong learning and talent, but it is also the impact of technology on people that is important to consider. How is the pace of technological change affecting your community? How will members build and maintain their tech fluency?

More than technology is changing. The gig economy, job shifting, and nomadic workers are redefining the workforce. Globalization of the economy and the changing organizational structures, such as the move towards flatter organizations, strengthen the importance of human capital. We live in a world where we shop via the internet for same-day or next-day delivery, demonstrating first-hand how transportation, computing, and communication costs are amazingly low. Across the globe, companies and capital move freely across national borders creating more opportunities and more competition. These external forces, which are changing the way in which our community works, mean that it is impossible for individuals to acquire what they need for working life in one "lump."

Second, traditional education systems focus on knowledge and skills. Professionals demand specific knowledge. Associations should support that domain-specific knowledge through formal education, certifications, and CEUs. However, in a new paradigm where knowledge is just an internet search away and skills have a limited lifespan before they are outdated, life-long learning offers associations an opportunity to help members build capabilities.

Skills evolve as the world around us changes. Skills to use software or a piece of machinery are instantly devalued when that software is outdated or the machinery is no longer used. Capabilities help people evolve effectively. John Hagel III writes, "These capabilities can take many different forms but, in my mind, the core capabilities are curiosity, imagination, creativity, critical thinking and social and emotional intelligence. If we cultivate these capabilities, we'll be able to quickly understand the evolving contexts we live in and acquire the skills that will help us to operate successfully in very specific contexts."

Skills are about "knowing how." Knowledge is about "knowing what." Ted Kahn identified seven new forms of learning beyond those two. They include: Know-who, Know "what-not," Know "what-if...?," Know-where, Know-when, Know-why, and Care-why. These new forms of learning represent new capabilities. A focus on capabilities allows people to operate at a higher-level where human creativity, intuition, emotional intelligence, and problem-solving are needed. Further, capabilities help people understand what skills they need to hone and refine to operate as professionals within their specific domain.

Third, lifelong learning supports membership value, encourages engagement and provides education. A focus on lifelong learning can serve as a tool to reach beyond members and it can be a hook to snag the interest of non-members. It can potentially serve as the foundation for a more transactional relationship that either leads to membership/further engagement, such as attending a formal conference or annual meeting, or it provides a source for ancillary revenue. Lifelong learning can be positioned to support an association's value proposition.


Associations should re-evaluate their assets to create a lifelong learning ecosystem that encompasses members and non-members. This ecosystem will:

- Invite exploration
- Embrace social learning
- Extend learning beyond the confines of conferences and annual meetings, beyond your members, and beyond the traditional domains of learning (topics and speakers)
- Create synergies between partners and sectors
- Encourage people to embrace a growth mindset in two ways:

thinking of learning as a life journey and realizing that they can learn in new ways

This ecosystem is not founded on a computer system or tool but rather it re-aligns the assets of the association to create a new system that promotes learning, exchanges, and facilitates knowledge. The ecosystem leverages:

- Spaces: Physical, social, virtual, intellectual, psychological
- Resources: People, tools, technology, repositories of knowledge
- Processes: Activities and experiences
- Relationships: Between people, ideas, objects, places, problems
- Contexts: Circumstances, situations, problems, challenges and opportunities
- People: Members and non-members' will, knowledge, skills and capabilities, qualities and character, creativity, confidence, self-beliefs, self-awareness and self-regulation

The lifelong learning ecosystem invites exploration in ways that are convenient, mobile, rich in application and context, and digestible. The ecosystem encores social relationships, promotes personal advancement, and satisfies inquiring minds. It may also meet external professional expectations, improve the world through community service, or provide escape from routines and relieve boredom. This invitation to explore is fueled by multiple sources that motivate adult learning and can awaken the growth mindset. It encourages members and non-members to look for and make use of the opportunities available to stay relevant in a changing world. Beyond supporting members needs for relevancy, lifelong learning also supports membership value and engagement. L3 is a winning proposition for associations and members. 

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GDPR Compliance and Website Privacy Policies

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: I have heard a lot about the GDPR. As a United States based association, does it apply to us, and, if so, what do we need to do?

A: It may, in which case your association needs to review and update its current data privacy practices to comply. One important part of that process will be to revise your association's privacy policy.

As background, replacing a 20-year-old European Union (EU) data privacy framework, the General Data Protection Regulation (GDPR) was adopted in 2016 and took effect on May 25, 2018 for the purpose of protecting "personal data." The regulation broadly defines "personal data" to include, among other things, individuals' names, email addresses, photographs, bank details, social media posts, medical information, and computer Internet Protocol (IP) addresses. The GDPR regulates how for-profit and not-for-profit entities collect, use, and maintain such personal data.

In contrast with the prior EU data privacy framework, the GDPR applies automatically to all EU member states and asserts that its geographic scope extends beyond the boundaries of the EU. Specifically, the GDPR regulates entities located outside the EU, including those in the United States, which obtain personal data of EU residents in connection with goods and services provided to them. Again, the terms are broadly defined: goods and services not only include those for which payment is made (e.g., conference registration and purchase of educational materials), but also those which are freely available on an association's Website.

Thus, any association that allows EU residents to participate in on-line communities or uses "cookies" to collect information from visitors to its website (including EU residents) may be subject to the GDPR.


Certainly, then, the GDPR affects associations with members in the EU. Those associations should evaluate their practices for collecting, using, and maintaining members' personal data. That evaluation should include a review of all record management systems (both paper and electronic) to: (i) understand the full scope of the information the association collects; (ii) identify third parties with which the association may share information; and (iii) document security measures the association uses to protect that information. The intent of the review is to identify those areas where changes must be made to comply with the GDPR.

One critical step in complying with the GDPR is to post a privacy policy on the association's website that explains—in a clear, transparent, and easily accessible fashion—(i) when, where, and from whom the association receives personal data; (ii) what that data includes; (iii) what the association does with the data; and (iv) how individuals can access and manage the data they have provided. At a minimum, privacy policies must address the following:

- **Information Collection.** Describe the various means by which the association collects personal data (e.g., online portals, emails, and telephone calls), as well as the nature of the data (e.g., members' names, job titles, mailing addresses, e-mail ad-

resses, telephone numbers, fax numbers, and photographs). Note any "special" data (including demographic data) the association may collect (and recognize that the association must obtain consent to collect certain data, such as race, ethnicity, or sexual orientation). Identify any information the association collects automatically (such as website cookies).

- **Information Use.** Set forth the basis on which the association relies to collect personal data under the GDPR (typically, the association's "legitimate interests" or the individual's consent). List all applicable business purposes for obtaining information (e.g., to provide services, secure membership status, and track educational activities). Associations must analyze the information they collect to determine the appropriate basis for doing so. Generally, legitimate interests are more appropriate than consent where the association cannot provide the service without the information.
- **Information Sharing.** Identify the circumstances where the association shares information with third parties (e.g., distributing event attendee lists, obtaining vendor services, and responding to subpoenas). Be aware that, for data shared with third-party vendors (for example, for event management or journal publication services), associations also should enter into data processing agreements to specify and document each party's obligations and rights under the GDPR.
- **Access to Information.** Advise individual users: (i) that they have certain rights to access and manage their data in the association's possession under the GDPR; and (ii) how they can exercise those rights. For example, an association must be able to disclose to an individual all personal data it maintains on that person (the "right of access"), correct any inaccuracies in that data (the "right to rectification"), delete that data (the "right to erasure" or "right to be forgotten"), and provide the individual with a copy of that data (the "right to portability"). Provide the association's contact information (e.g., an email address) to allow individuals to make such requests.

The privacy policy is only one component of association GDPR compliance efforts. While every privacy policy should address an association's collection, use, and sharing of information and individuals' ability to access that information, privacy policies are not one-size-fits-all. Since organizations handle personal information differently, each association should customize its privacy policy to communicate its particular practices. Equally important, associations periodically should revisit and, as necessary, update their privacy policies as their data collection practices evolve over time. 

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.

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On the Ground at DigitalNow 2018: Digital Transformation

By **Dan Shea**

With contributions from **Melissa Walling, CAE**

A “digital transformation” sounds daunting, doesn’t it? Introducing new technology takes time and resources. Bringing your colleagues on board through employee training and process overhaul can be complicated and full of roadblocks. Encouraging members to embrace and use your innovative technology can be even more of an uphill battle.

If it all seems overwhelming, you may be looking at it from the wrong angle. When DigitalNow chose “digital transformation” as its theme for its 2018 conference in Austin, it did so because no other conference was concentrating on addressing the issues that association leaders face when pursuing technological innovation and implementation.

Those issues, as laid out in the conference description, included the following: Non-supportive culture. Lack of alignment of staff and volunteer leadership. Not attracting and growing the right talent. Fighting the legacy battle. Inability to apply the right data and analytics. Do you notice a trend among those roadblocks? They aren’t talking about the nitty-gritty implementation details that your IT department will undoubtedly spend long hours sweating over. They’re talking about culture, talent, alignment—the abstract concepts that lay the groundwork to allow major change to be seamless.

The Role of the C-Suite in Digital Transformation

Digital transformation is not updating to a specific technology. It’s about empowering your organization to think critically and openly about you and your members’ needs, ensuring any upgrades support those needs and preparing your organization to embrace and implement the technology. For any organiza-

tion looking to travel down the road of digital transformation, it begins at the top.

“The role of the C-Suite is to actually understand and comprehend the landscape related to the industry and how they can best serve the members in this context,” says Rhea Steele, MS, CAE. Steele is the COO of the Council for the Accreditation of Educator Preparation. She, along with Trevor Mitchell, MBA, CAE, executive director and CEO of American MENSA, presented a session at DigitalNow called *Readying Members for Digital Adoption*. “[The C-Suite should be] really thinking through members’ needs and the organizational goals, then mapping those to what solutions would be best. Then, once that is done, ensure buy-in from the entire organization and momentum to get it done in the organization.”

Mitchell explains that in preparing staff for a digital transformation, association leaders often overlook one key element. “A lot of times it’s how we’ve trained them,” he says. “They are taught the process and how to use the system, but they’re not taught the why.” Engaging your staff with the purpose behind a new system holds multiple benefits. They can look holistically at the new processes and understand on a deeper level what they are meant to achieve, allowing them to make recommendations on improvements.

Additionally, understanding the why of new systems can assuage the fears that machines are being brought in to replace them. “In real-

ity, [leaders] are working to leverage technologies to create efficiencies in the organization to allow them to focus on the things they have passions around and would really benefit the members, instead of spending most of the time processing checks and registrations.”

Steele sees part of the problem being that staff at associations can be so overwhelmed with day-to-day operations that even if they understand the big picture, there isn't much they can do about it. “Part of what happens is that they're so busy getting the work done. They know something is not right, but they don't have the time to sort it out, because the next help desk call just came in,” she says. “They're really not able to get their head above water long enough to really think it through.”

A Transformation of Education

Associations have long led the way on providing innovative and important post-secondary education. With the rising cost of college causing a decrease in accessibility to higher learning worldwide, associations are primed and ready to deliver much-needed education to a growing workforce, according to Elizabeth Engel, CEO & chief strategist for Spark Consulting. Engel presented a session at DigitalNow based on the white paper authored by herself and Shelly Alcorn, principal at Alcorn Associates, The Association Role in the New Education Paradigm.

“Globally, we're dealing with mass youth unemployment,” Engel says, “and also a massive skills gap. Meanwhile, there are millions of jobs that are going unfilled.” Associations can help fill this skills gap by providing the same sort of job training and industry-specific education that they have been doing for the past century, and the new technology available allows them to do it at much more intensive and inclusive levels.

With the rate of innovation surging forward exponentially, entirely new sectors are being created and the classic universities are unable to keep up with the demand. “Putting together a degree program is a really significant

investment of resources,” Engel says. “In a lot of fields, jobs are arising and changing dramatically, either shifting to something completely different or ceasing to exist in a matter of a couple of years. A university hasn't even had time to put together a degree program yet. Associations can adapt quickly enough to respond, particularly if they focus on digital badging and micro-credentialing, for example.”

Another cause of the underemployment of the younger generations is a lack of on-the-job training. In the past, a factory would gladly put extensive resources into training an employee, because they were likely to remain in that position for a decade or more. “Employers don't feel responsible for training people anymore,” Engel says. “If you want to get trained, that's on you. [Employers] are not going to hire you and then train you with the expectation on both parts that you'll be here forever. It's in your interest to get

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“It’s time for us to offer solutions to this very significant global socio-economic problem, because we have things that make us unique that literally no other player who’s trying to solve this problem has. It’s time for us to start leveraging that.”


the training.”

Micro-credentialing and digital badging on the part of associations can permit workers to acquire those skills on their own without committing to a four-year degree and potentially substantial amounts of debt. Associations become both the provider of education and the trusted source of verification that the individual earned the credential or badge. To achieve that end, associations and employers need to engage in a sort of partnership—one of mutual understanding and benefit.

“The association industry represents every profession and every industry you can possibly think of,” Engel says of how associations should position themselves as assets to employers. “We are all innovating different ways to help our people be ready for the way the workforce is changing and the way the educational environment is changing. We want to come play, because we think we can help you.”

In Engel’s view, the benefit of this educational transformation in the association world is more important than simply increasing non-dues revenue, providing better value for members and advocating on behalf of industries. It’s the chance to be a catalyst for solving major global problems.

“It’s really important for us to come together as an industry on this topic. There’s a piece of this that is about doing truly global good in the capital G sense, which hopefully is one of the reasons we’re all in the association industry. It’s

time for the us to offer solutions to this very significant global socio-economic problem, because we have things that make us unique that literally no other player who’s trying to solve this problem has. It’s time for us to start leveraging that.” 

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Digital Extra

To download the white paper *The Association Role in the New Education Paradigm*, visit the digital edition of *FORUM*

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Disengaged and Confused:

Improving the Identity of Your Brand

By **Candice Warltier**

Do your association members understand your brand? Are you delivering a consistent message? If you aren't delivering a consistent message in a recognizable package, your members may be disengaged and confused. In the worst-case scenario, they don't even recognize that the communications, the programs or the advocacy work you spend so much time creating are ultimately coming from your organization.

For many associations, embarking on a brand refresh or new brand can be a challenge. FORUM spoke with branding expert Michael D. McGuire, president & CEO of 88 Brand Partners and association executives from the American Orthopaedic Society for Sports Medicine and Forefront about their experiences with embarking on a rebrand.

Determining the Brand

Are your members engaged? Does your brand reflect your true membership? These are questions that associations executives increasingly must ask themselves.

I'm sure you've heard it before—a brand is more than your logo. According to McGuire, a brand includes how members feel about their membership; it is your reputation. "Your brand is the DNA and arguably the most important thing you have," said McGuire. "There can be a disconnect between how you are presenting your brand and how members feel."

An association's brand includes its name, logo, color palette and typography. It includes the communication vehicles, such as e-newsletters and webinars. In addition, the brand includes the "voice" and messaging; it is the personality reflected on its website and through social media. Some organizations may need a completely new brand to remain relevant, including a new name, logo, visual identity and message, while others simply undergo a brand refresh.

At Forefront, the only statewide membership association for nonprofits, grantmakers, public agencies, advisors and allies, remaining relatable was one of the drivers for the rebranding. The organization was founded in 1974 as "Donors Forum," with that name reflecting the original core membership of grantmakers. Even as the organi-

zation added nonprofit and advisor members over the years, the name remained the same. "Although we had become a well-respected organization, our name—Donors Forum—did not fully represent our evolved constituency, nor convey the breadth and critical nature of our work," said Kathleen Murphy, director, communications of Forefront.

Identifying the Right Time

The American Orthopaedic Society for Sports Medicine (AOSSM), an association of nearly 4,000 members from around the world who are orthopaedic surgeons, physical therapists and others who specialize in sports medicine care, made the strategic decision to embark on a rebrand two years ago. The culmination of that work is a new brand that is being unveiled in June 2018 (see sidebar).

"The rebrand was related to ensuring we were better engaging and interacting with members in our fast-paced and visually rich world. We wanted to take our look and bring it into the future," said Lisa Weisenberger, director of marketing communications at AOSSM.

According to AOSSM's CEO, Greg Dummer, CAE, remaining relevant was essential. "We are approaching our 50th anniversary and wanted to maintain the strong traditional commitment to our heritage. But we were also inspired by the younger orthopaedic professionals coming through the ranks."

For most organizations, the time to rebrand may not be so clear. According to McGuire, it is smart to reassess a brand if there are changes to the competitive landscape or if the organizations' services or products have changed.

"Associations should consider self-assessments and competitive audits—this needs to be part of the planning process," said McGuire. "If you wait

“Associations need to maintain relevancy to meet the needs of its dynamic audience. A brand must align with all audiences, including those whom association aims to attract in the future. Considering many associations rely upon attracting young professionals as incoming members, a successful future is highly dependent on a strong brand identity.”

until you see dips in renewal rates or drops in acquisition, then you are behind the ball and the damage is already being done. You need to stay ahead of that.”

McGuire suggests placing one piece of every member-facing communication on a wall and asking, “Does the body of work look like it is coming from one organization? Is it too homogenized? Too wild west? Are there inconsistencies in photography or color? Is it representative of our member base?”

The bottom line is that an association needs to maintain relevancy to meet the needs of its dynamic audience. A brand must align with all audiences, including those whom an association aims to attract in the future. Considering how many associations rely upon attracting young professionals as incoming members, a successful future is highly dependent on a strong brand identity.

Getting Started

Many associations look to a consultant or agency to develop a branding initiative. For AOSSM, they retained the services of a branding agency to conduct a communications audit and a survey of members and nonmembers over the course of three to six months. The firm also worked with AOSSM to develop a brand platform that included a brand personality and brand positioning.

When the AOSSM communications team was ready to present to the board, they were armed with the results of the communications audit and member insights to support their recommendation of undergoing a full rebrand.

“There was a bit of trepidation, but for most part, the board was receptive and realized we needed to take steps to move forward. We worked through the issues and made presentations at the

board meetings addressing why we needed to go through this and what the positive end result would be,” said Weisenberger. Once the board approved the budget for the rebrand, AOSSM was ready to implement the recommendations and worked with a marketing communications agency to help create the collateral pieces.

At Forefront, once the board determined that renaming the organization was going to be critical for success, they developed an RFP. “We engaged a creative firm to guide us in choosing a new name. Engaging an outside firm turned out to be critically important for many reasons—the least of which is that an outside firm provides objectivity,” said Murphy.

Driving Success

For both AOSSM and Forefront, creating branding “task forces” allowed them to involve their members and other key constituents in a controlled manner. “We developed a rebrand working group consisting of leadership team members, communications staff, board members, and key constituents. This ‘brain trust’ provided feedback and input at critical junctures in the process,” said Murphy.

AOSSM developed a special task force which included past presidents and a diverse representation of its membership. “The diversity in terms of age and amount of time spent in the profession led to respect among all individuals,” said Weisenberger. “The Task Force was charged with helping to educate the board members, many of whom were holding onto the organization’s history in regards to the recommendation to change the logo. The win for us was the pre-work and the presentation that was put forward to the board,” said Dummer.

Rolling it Out

For AOSSM, the rebrand included the development of the brand strategy, personality and messaging as well as a new logo, color palette, collateral materials, video and website. “People get focused on the look—while one of the most important elements of the rebrand is messaging. The messaging must be consistent and work for all demographics you connect with,” said Dummer.

AOSSM launched its refreshed brand in June 2018 and will unveil many of the new materials at its annual meeting in July. “We didn’t want anyone to be surprised, so it’s a soft roll out, educating our members about the process and importance of the brand through various vehicles such as emails, social media and our print quarterly newsletter,” said Dummer.

“Our new brand speaks to an evolution, not revolution, and ensures we honor both the tradition and the future, so the new members can move our organization forward even further,” explained Weisenberger.


Forefront also conducted research to uncover member insights and held focus groups, sent email surveys and spoke candidly with members.

“At first, the creative agency pitched a list of name ideas to us; eventually it was whittled down to five, then three, then one. We kept our board apprised of the process, and staff were involved appropriately,” said Murphy. For more details on the naming process visit: <https://soundcloud.com/forefront/episode-5-rebranding-a-40-year-old-membership-organization>.

Forefront’s final brand included a visual identity, brand strategy, logo, marketing collateral, and new “skin” for its website. The organization unveiled the new name at a kick-off event at the downtown Chicago office of one of its corporate members. Eric Weinheimer, Forefront’s president and CEO, revealed the new name, logo and other materials in front of the board, staff, key constituents and guests.

Looking to the Future

“Our combination of grantmaking and nonprofit members is unique in the nation, and the new name puts us in the position to be a driver of social innovation and new ideas. This concept of making

our organization, and Illinois in general, the thriving hub of new ideas for promoting social good can help draw people in to the sector and allow us to do our work even better,” said Murphy. 

Candice Wartier is principal at Communication Strategies Group, a strategic communications consulting firm. She can be reached at cwartier@communication-strategies.com.

The AOSSM unveils new brand

American Orthopaedic Society for Sports Medicine unveiled its new brand in June 2018. The organization completed a two-year rebranding initiative which included the development of a brand strategy and platform, messaging, a new logo, collateral materials, website and video. The members were educated about the process of the logo and branding switch through a series of articles in their member newsletter. The new identity was unveiled in the newsletter, website, Journals, social media, and in a series of special emails.



Old logo



New logo

The members will also see the new look during the annual meeting in July. The new website and video can be seen here: (www.sportsmed.org).

Podcasting for Associations is

Audio programs for associations are nothing new. In fact, some organizations have been doing them for more than ten years. Recently, interest has been on the rise due to the availability of podcasts on mobile devices and the increased accessibility of the technologies used to produce them. To find out more about how associations are embracing podcasts and audio programs, FORUM spoke with several organizations who are at the forefront of the podcasting trend. The production efforts ranged from staff-driven “do-it-yourself” to complete outsourcing from a vendor.

Robin Roy

Managing Director, Center for
Member Practice Groups
Director, Section of Real Property,
Trust and Estate Law
American Bar Association: Real
Property Trust and Estate Section
Podcast: *ModioLegal*

Kathryn Mulligan

Editor, Middle Market Growth
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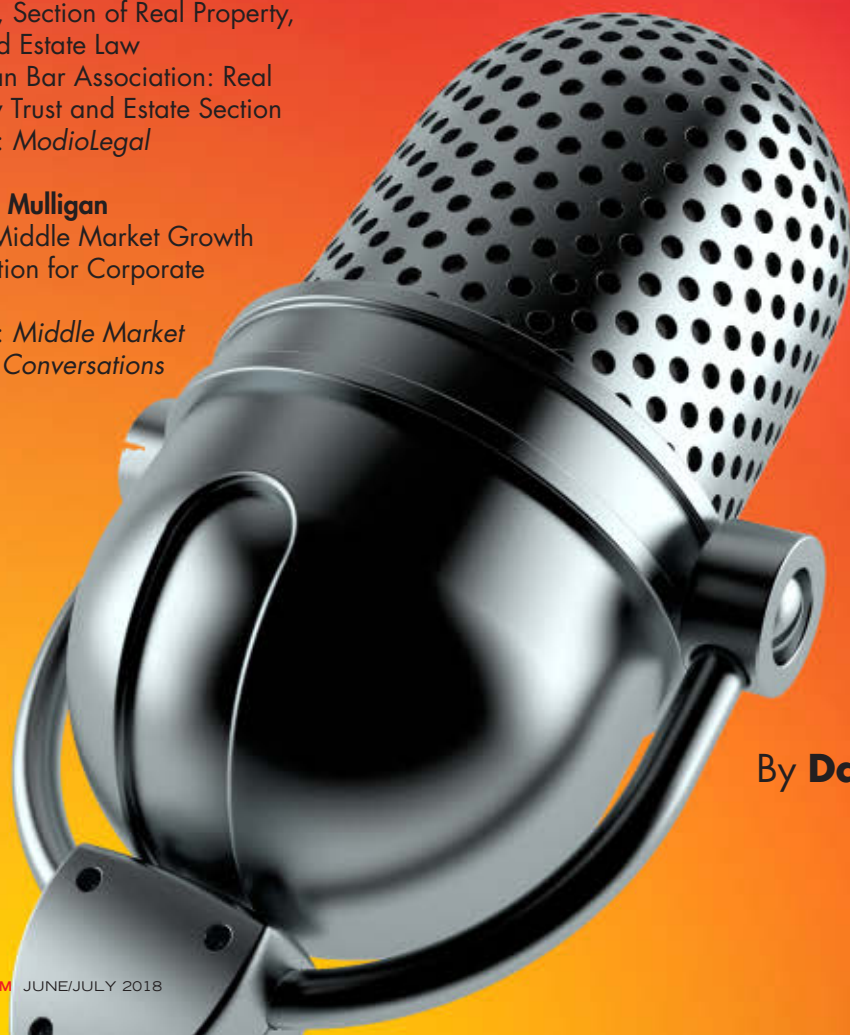
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Peter Finn

Deputy Executive Director and
Chief Learning Officer
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Podcast: *The Diverse Podcast*

By **Dan Pietroske**



EXPLORE!

FORUM: What prompted the interest in adding an audio program/podcast?

APA: We started doing podcasts around 2006. At the time, we were beginning to incorporate recording technology into our office space to capture the audio from in-house events. After our first few events and recordings we determined that we should start a podcast to offer these programs up to our members. All of this seemed to indicate to us that moving into creating podcast content would be a worthwhile endeavor. Since then we've been creating additional programs and episodes trying out various different types of approaches including interviews, news updates, speaking event recordings and more.

ABA: ModioLegal was referred to us by another ABA group. Staff thought it was a great idea that members would appreciate, so they set up a ModioLegal demo with the editors of the section periodicals. The editors liked the service as well, and made a proposal to the section executive committee to have a trial run.

ACG: We felt like having a podcast was a nice addition to the Middle Market Growth suite of media. It's a powerful complement to our other assets; it enables us to feature some of the people that we write about in the magazine, as well as giving our members another way to hear insights from their peers. We saw the podcast as a good way to cover topics that maybe we didn't have room for in print, and to showcase ACG members and their great work building companies and creating jobs.

MDRT: The MDRT Podcast launched in January 2015 as a result of our content strategy. We wanted to provide our members with the topics and ideas that will help them get ahead in the financial services profession but in the format they want. The podcast gave us another medium to present the same kinds of ideas we already offered in our bimonthly magazine.

SWE: Through a variety of member surveys, we found that there was an appetite for this format. Also, there was a good deal of initial interest in the Diverse podcast that has led to a growing list of subscribers.

FORUM: Is there a formula you follow to structure your episodes?

ACG: The formula is really an intro that tees up the conversation, then the edited conversation with our guest ranges from 15 to 25 minutes. We close each episode with an outro

reminding listeners of how to subscribe to the podcast and where they can find other Middle Market Growth content. I like to end each interview by asking our guests what they've been reading lately. It's a topic that everyone is interested in talking about and it's been fun to hear how people approach it differently. It's a humanizing element to help get to know the guest and what makes them tick.

MDRT: Our formula is to simply get three to four members in a room and throw out a few questions. They usually start by answering individually, but as the discussion continues, the conversation is less directed by us and more by them. It's authentic and unscripted.

APA: We usually like to have each episode's length be at least 20 minutes long and about an hour or so maximum. We also consistently pre-record an intro and outro for each series. The intros usually give a brief description of the specific program or series, introduce the host, and provide a quick bio of the guest. The outro for each episode usually consists of some information on where the podcast can be found, as well as providing an email alias where listeners can send feedback or suggestions for future episodes.

FORUM: What types of content do you normally cover? Is the program more formal or casual?

ABA: Each narration is simply a reading of the written article. Our members have the challenge of not always having time to read the print version, so by providing the same content as the print version, the audio format solves their problem.

ACG: The topics we cover all relate in some way to growing companies or the broader business climate, but they're wide ranging. We've had a retail futurist on the podcast to discuss the future of shopping and how the consumer experience is becoming more experiential. We had the former CEO of GE, Jeff Immelt, who talked about his tenure as the company's leader and the criticism he's faced since stepping down. It is important that we keep the interview conversational. We want the content to be informative and succinct, but we also want to showcase the personalities of the guests.

MDRT: The MDRT Podcast showcases MDRT members' tips for increasing business efficiency, appreciating clients and adding value to their practice. It's formal in that we publish an episode on the first of each month, but the content is casual. We go into the interview with a loose idea of where we'll end up, but that's part of the fun.

APA: Our podcast episodes cover a range of topics and people within the urban planning sphere. We run multiple types of programs within the overall podcast structure and break them out into specific sub programs or “series.” For example, our series “The People Behind the Plans” focuses more on the individuals being interviewed and their story. On the other end of the spectrum, some of our podcast content will cover a specific issue or topic. We have also repurposed recordings from events such as our after-hours lecture series called “Tuesdays at APA.”

FORUM: Who is your intended audience?

MDRT: We launched in January 2015. We ended that year with 7,685 total listens of the 12 episodes we had at the time. In 2016, that number climbed to 16,674, and in 2017, we ended with 29,551. We’re on track to surpass that this year.

APA: The overall response has been relatively positive. We’ll get a few emails every week or so saying how much they like the podcast as well as suggestions for future guests or topics. On average, the podcast has between 2,000 to 3,000 subscribers with an average of a little more than 1,000 episode downloads a week.

SWE: The response has been very positive from our members and noted in the member surveying we conduct. Since we launched two years ago we have had over 12,000 downloads.

FORUM: How much effort and staff time is required to get one podcast produced?

ABA: Not much on the ABA’s end. We send the text files to ModioLegal at the same time as they go to the printer. They produce and distribute the audio edition by the time we release the text version to our members.

ACG: It really varies. The time involved includes making the ask and setting up the interview. Often, we’ll have an introductory call to discuss topics with the guest in advance, which provides talking points for the interview. Editing the audio takes several hours and can involve reordering content and making cuts, as well as adjusting audio quality.

MDRT: I would estimate that 10 hours of staff time is spent per episode to identify participants, determine the initial questions, use the transcripts to determine distinct episodes, and write the headline and intro.

APA: Each APA podcast episode probably takes around three to four hours of staff time. Both the recording and editing portions of the process seem to take up a bulk of that time.

SWE: The podcast production is pretty quick. Once we have the interview questions and a brief discussion of the format with the interviewee, the production time is limited to an hour.

FORUM: Who does the voice narration or conducts the interviews?

ABA: One of the interesting elements of ModioLegal’s patented business process is that they use students from the area of specialty to perform the narrations; in our case law students.

ACG: The Middle Market Growth editorial staff conducts the interviews. For the intro and outro, I typically record those segments with a colleague from our communications team so that there are two of our voices to tee up the conversation.

APA: The voice narration for each episode is either an APA member who’s the dedicated person interviewing or hosting or someone on our staff.

FORUM: How are you getting the word out about this program?

ABA: We sent an email to our members letting them know about the benefit. We will have a sticker on the cover of the first magazine issue with audio files as well as a more detailed article explaining the program in this issue. We are also posting information on social media.

ACG: We publish the podcast through Soundcloud and iTunes, so listeners can find the show through those platforms. We also embed audio for each episode on our website. We’ll then share it via the association and the magazine’s respective social media channels. Each issue of our print magazine features a blurb that promotes an episode of the podcast. Finally, in the outro of each recording, we ask listeners to rate and review the podcast on iTunes. That’s an effective way to help like-minded listeners find out about us.

MDRT: We promote our podcast to our members through social media and our e-newsletter. We also cross-promote it in our magazine, which sometimes features articles written from the same interviews that result in podcast episodes. We also use the MDRT Blog to promote the podcast.

“The primary cost associated with our podcast is related to staff time. There are also some minor equipment costs for microphones, stands, audio mixers, cables, etc. Currently our costs are just rolled into overhead for a larger communications budget.”

FORUM: Tell me about the general cost of this program and how you cover this cost.

APA: The primary cost associated with our podcast is related to staff time. There are also some minor equipment costs for microphones, stands, audio mixers, cables, etc. Currently our costs are just rolled into overhead for a larger communications budget.

MDRT: We consider the MDRT Podcast a member benefit. As is true with all of our content—print and digital—we don’t accept advertising, so the cost is primarily covered by member dues.

SWE: The cost of the program is really staff time and the cost of the software. The production is pretty efficient and the software is not terribly expensive, so I would say in the grand scheme, the costs are fairly nominal. We’ll likely never charge for access—since it is a great way to promote SWE to non-members or past members and let them know what great stuff we’re up to.

FORUM: Can you generate revenue from this program? How does that work?

ACG: We definitely see revenue potential, and we’ve had a number of inquiries from potential advertisers. It’s important for us that the content remain editorially driven, but we’re exploring packages to offer advertisers an opportunity to underwrite the interviews.


SWE: The primary way in which you can generate revenue is from advertising. Audio-based ads can be read by your host and the beginning (pre-roll) or middle (mid-roll) of the podcast episode. Podcast ads are usually sold as 10, 30, or 60 second spots. There are also options to partner with organizations or businesses to create sponsored content for your podcast. This basically means the content of the podcast or the subject matter is provided by the advertiser or sponsor. There are also podcast advertising networks that work specifically in this space that help podcast creators link up with advertisers.

FORUM: What advice would you give to an association who is interested in starting a podcast?

ACG: Make sure the audio quality is as good as you can make it within your equipment budget constraints. There are so many other podcasts to choose from that if the audio quality is poor, a listener is going to turn off your podcast, and they likely won’t come back.

MDRT: I would recommend not scripting your podcasts. We’ve found our audience loves that they’re listening in on an authentic conversation among other MDRT-level producers. Their personalities come through, and it becomes an extension of our in-person meetings. They feel like they’re right there with them.

APA: Really have a plan. Once you start you need to be committed to a schedule and content. Before starting, be sure you have completed two or three episodes as practice.

SWE: The strategy part is very important. Look carefully at your content strategy. Make it complementary to other sources of content. Be sure you know what message you want to be communicating. 

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OMAHA: THE COMPLETE PACKAGE

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Omaha’s cool factor is its food. *Midwest Living* listed Omaha as a ‘Top Ten Ultimate Bucket List Destinations for Foodies.’ Any city worth its foodie reputation has a signature dish and Omaha is lucky to have two. Best known for its legendary, mouth-watering steaks, visiting Omaha for steak isn’t a trip, it’s a pilgrimage. Omaha is also home to the Reuben sandwich – yep, it was invented here. Many have duplicated it, but you should always travel for the original.

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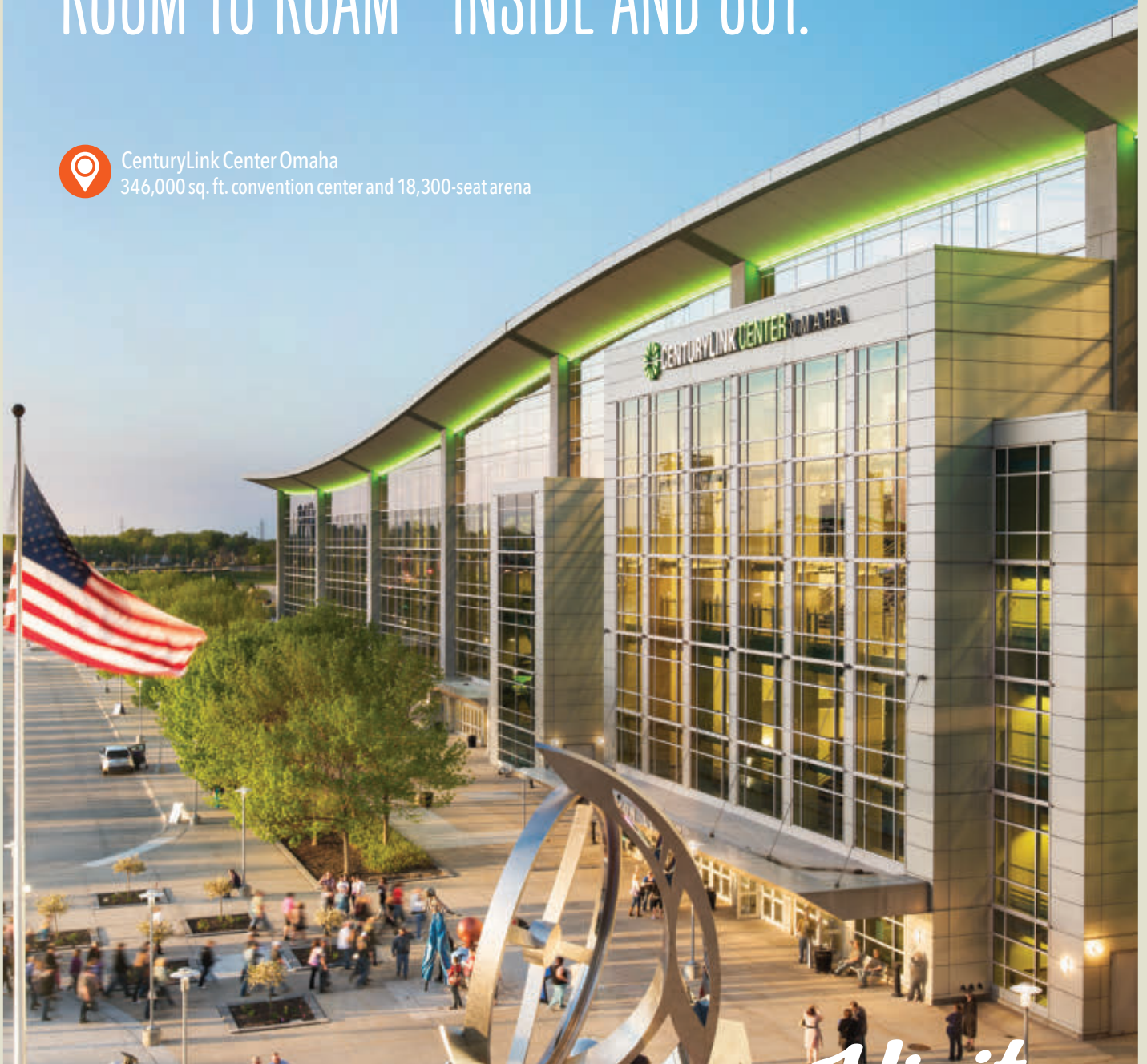
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Some Pros and Cons of Arbitrating Employment Disputes

By **Paul M. King**

Arbitration clauses are becoming ubiquitous. They are included in the terms and contracts with companies ranging from Facebook and Instagram to Comcast and Verizon. They appear in agreements with professionals (such as lawyers), as well as retail (e.g., Gucci) and service contracts (e.g., Uber) for things we use every day. Arbitration clauses have also long been common in union contracts. They are becoming more prevalent in employment agreements of non-union employees. A recent study by the Employee Rights Advocacy Institute suggests that 80 of the top 100 companies in the United States use arbitration clauses in their employment agreements. This trend will likely continue given the United States Supreme Court's recent decision in *Epic Systems Corp. v. Lewis*. There, the Court held that arbitration clauses in employment agreements may require employees to pursue employment disputes in individualized arbitration proceedings, rather than as a group through a class action lawsuit. The decision provides employers with greater certainty about insisting on arbitration as a method of dispute resolution and makes it easier for them to avert employee class action lawsuits.



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Paul is a Certified Public Accountant and spent nearly three years prior to law school as a Mutual Fund Compliance Analyst at a Fortune 150 Company, working with mutual funds on everything from annual audits to project management. During law school, Paul was a member of the Chicago-Kent Moot Court Honor Society, a founding member of the Law Firm Management Society at Chicago Kent and an extern for the Illinois Appellate Court. Paul grew up in Winnetka, a North Chicago suburb. He is an avid NBA fan and a diehard Chicago Bulls enthusiast.

The question employers face is whether they should require their employees to arbitrate disputes. This article explores some pros and cons of binding arbitration clauses and some ways employers can improve their chances of having enforceable arbitration clauses.

The Pros and Cons of Arbitration

While there is much to like about arbitration, each employer needs to consider whether it is the best way for it to resolve employment disputes. Below are some pros and cons employers may want to consider in deciding whether requiring employees to arbitrate employment related disputes is the right choice.

1. **Cost:** Arbitration is generally a less costly option due to its less formal and speedier process, but there are both pros and cons to this factor.
 - a. **Pros** – Utilizing arbitration can help employers limit their spending on employee-related legal disputes. This can reduce the leverage of opposing parties to extract a larger settlement based merely on “cost of defense.” The Supreme Court’s recent decision in *Epic Systems Corp. v. Lewis* increased the potential cost savings of arbitration clauses by allowing employers to prevent employees from bringing a class action. This can further increase cost savings for employers because a single employee’s claim may be small enough that the employee deems it not worth pursuing individually.
 - b. **Cons** – Arbitration is generally less expensive, but this is not always the case. The ultimate cost is highly dependent on the specific arbitration and the rules, including how much discovery is allowed, the actions of opposing counsel, and the complexity of the case. Additionally, one of the costs of arbitration is the arbitrator’s hourly fee. Because parties are rarely able to control the amount of time an arbitrator spends on a case, it is more difficult to contain that cost. To the extent the parties wish to attempt a resolution, enlisting the arbitrator’s assistance is an extra cost, whereas judges in courts will host settlement sessions and try cases without charge. Because arbitration is generally less costly, this can encourage employees to file claims that they otherwise would not file in court due to the potential cost.
2. **Time / Speed:** According to a recent study by the American Arbitration Association, U.S. district court cases take 12 months longer, on average, to get to trial than arbitration. Time, however, may not always be on your side.
 - a. **Pros** – Arbitration disputes may resolve more quickly than litigation. Smaller claims can be resolved under some arbitration organization’s rules in 45 days. Faster resolutions may allow employers to focus on other matters. It may also free up employees to be more productive by spending less time doing things like pulling documents for a hearing, being deposed, or attending hearings. Less time can also mean lower legal fees.
 - b. **Cons** – There is a risk that arbitration may end up taking longer than a lawsuit. Many arbitrators are less likely to grant a motion that could end a claim before a hearing, as compared to judges, most of whom are more likely to grant such a motion before trial. This means that arbitration can ultimately consume more of an employer’s time.
3. **Confidentiality and Privacy:** Documents filed in court are public record. In arbitration, parties usually agree to keep everything private. Privacy, however, may have unintended consequences.
 - a. **Pros** – Private arbitration can minimize the leverage an employee has to threaten going to the media. Moreover, the media does not have access to arbitration hearings.
 - b. **Cons** – Requiring non-disclosure of arbitration settlements may result in adverse tax consequences for employers. The Tax Cut and Jobs Act provides that no deduction will be allowed for “any settlement or payment related to sexual harassment or sexual abuse if such settlement or payment is subject to a nondisclosure agreement.” Although it is not yet clear, an arbitration clause or arbitration rules requiring privacy of settlements might be such a nondisclosure agreement.



4. **Type of Relief:** Arbitrators can award injunctive relief, but they cannot enforce it. Only a court can enforce temporary restraining orders (“TRO”) and preliminary or permanent injunctions. This can work against an employer if it is the one calling foul.
 - a. **Pros** – If an employee seeks a TRO or a preliminary injunction, he/she might have to ask a court to enforce it. This would slow the enforcement down and allow the employer a chance to challenge enforcement in court.
 - b. **Cons** – The same applies to the employer. As discussed below, to have an enforceable arbitration clause, employers should also bind themselves to arbitrate employment disputes against employees. This means that, if an employee breaches his/her restrictive covenant (e.g., non-compete), the employer would first have to seek a TRO or preliminary injunction in arbitration. Then, the employer would have to ask a court to enforce the award. The employer’s ability to enforce the non-compete is likewise relaxed. There is a way, however, to draft an arbitration clause to avoid such a slowdown and yet maintain the enforceability of the arbitration clause. The prevailing party in an arbitration must go to court to collect money or enforce any injunction awarded in arbitration. This would require the prevailing party to file a lawsuit. Such a process normally takes about 90 days.
5. **Discovery:** Arbitration can have significantly less discovery (such as depositions) than litigation.
 - a. **Pros** – Less discovery adds to some of the previously mentioned benefits of arbitration, such as faster resolution and fewer costs.
 - b. **Cons** – Less discovery may leave a party and legal counsel with less opportunity to build the party’s case or analyze the opponent’s case. In arbitration, third party affidavits might more easily be submitted without cross-examination. Depending on the experience of the arbitrator, employees also may be able to more easily “prove” damages in arbitration using speculation and conjecture.
6. **Splitting the Proverbial Baby:** Some experts argue that arbitrators tend to resolve a dispute by making their decision somewhere in the middle of the parties’ positions. The American Arbitration Association, however, has disputed this in recent years. Assuming that arbitrators do tend to come down closer to the middle than they should, the party with the “winning” case will likely be less satisfied with the result.
 - a. **Pros** – The loss is lower for an employer who might otherwise have lost the case. An arbitrator’s “split-the-baby” decision might be preferred over risking an adverse decision or a large award in front of a jury. Juries are typically plaintiff-friendly because they tend to identify with and favor the emotional or sympathetic arguments that employees typically make. After all, as most jurors have been employees most of their careers, a jury is usually more a jury of an employee’s peers than a jury of an employer’s peers.
 - b. **Cons** – Analytics suggest that employers tend to win employment disputes, at least in federal court.
7. **Errors and Appeals:** An arbitrator is usually less bound by the law or the rules of evidence than a judge. Moreover, arbitration decisions are not normally appealable.
 - a. **Pros** – There is nothing favorable about errors. Errors, however, rarely happen. The parties typically select an arbitrator because of his/her expertise in an area of law, such as employment law. A typical arbitrator has fewer cases than a typical judge has and thus normally has more time to understand the facts of the case and to make a decision.
 - b. **Cons** – Good rarely comes from an error and the lack of an appeal compounds any error an arbitrator makes. Although it is rare, parties can be stuck with an irrational decision because arbitration awards are not typically appealable on their merits. Employers typically win employment disputes, so this is something employers must seriously weigh before deciding to require arbitration.

These are just some of the factors an employer may want to consider in deciding whether to adopt an arbitration clause in its employment agreements. The answer may also depend on each employer’s industry and the size of its workforce, among other considerations. There are some industries where arbitration clauses are widely used, so applicants for employment will expect them. For example, in the securities industry, persons licensed as registered representatives are generally required to arbitrate employment disputes before the Financial Industry Regulatory Authority, Inc., unless there is a claim of employment discrimination.

The Enforceability of Arbitration Clauses

The expected benefits an employer believes it will reap from utilizing arbitration are for naught if the arbitration clause is determined to be unenforceable. In such a case, the employee will be able to file his or her dispute in court, negating the expected advantages of arbitration. Therefore, employers should take steps to ensure the arbitration clause is enforceable. While each state’s law (or other industry and regulatory requirements) may differ on the specific requirements, below are a few general points that can increase the likelihood that an arbitration clause is enforceable in the courts. Employers, of course, should consult legal counsel about the specific requirements affecting their employment agreements. Generally, employers should:

- **Include the arbitration clause in an employment agreement.** Employers should include the arbitration clause in their written employment agreements, rather than using a separate document dealing with arbitration. This will limit the risk of

needing to give the employee additional consideration for the “separate” arbitration agreement. Taking this step can also reduce the risk of an employee successfully arguing that the “separate” arbitration agreement was “slipped in” or otherwise wrongly obtained.

- **Make the arbitration clause conspicuous.** The arbitration clause should be in its own paragraph or section and in a conspicuous place in the agreement so that an employee will be able to see it easily. Employers may also want to consider bolding the clause and putting it in all capital letters, making it less likely that an employee will successfully argue that he or she was unaware of the arbitration clause when reviewing and signing the agreement.
- **Allow the employee ample time to read the arbitration clause.** As with any agreement in the employment context, (whether at hiring or termination), employers should allow an employee ample time to read the agreement and avoid rushing or pressuring the employee into signing. This minimizes the risk of an employee’s claim of duress, mistake, or failure to understand the agreement, including, of course, the arbitration clause. Employers should include language in the employment agreement confirming that the employee had ample time to review the document and consult with legal counsel.


Additionally, the content of the actual arbitration clause is important to ensure not only that the clause is enforceable, but also enforceable as envisioned by the employer. Concepts employers should consider include the following:

- **The arbitration clause should clearly define the disputes to be arbitrated.** Employers should use appropriate language to clearly define what type of disputes are covered by an arbitration clause. The language should be broad enough to cover the disputes an employer intends to force into arbitration. Otherwise, an employee may drag an employer into court because the employee’s dispute does not fall within the clause.
- **Do not make the language too broad.** Notwithstanding the suggestion above, employers should be careful not to make the scope of the arbitration clause too broad. If the clause as written covers every possible dispute between the employee and the employer (e.g. personal injury due to use of a purchased company product), it may be held unenforceable as overly broad and unfair.
- **Identify the logistics of the arbitration.** The arbitration clause should identify whether the arbitration will be conducted by an outside dispute resolution service, by a pre-selected arbitrator, or before an arbitrator who is mutually selected by the parties. It should also specify who will pay for the cost of the arbitration. The cost should either be borne equally by the employer and the employee or borne solely by the employer, not placing the burden solely on the employee.
- **Identify the rules that will govern the arbitration.** For example, employers can specify the rules from one of the several arbitration organizations such as the American Arbitration

Association or JAMS. These organizations sometimes have their own rules for employment disputes. Employers may also want to specify how much, if any, and what kind of “discovery” an arbitration clause will allow before an arbitration hearing (if the selected rules do not cover this point).

- **Provide the employee with those rules.** The employer should provide the employee with the current rules, or at least a link to the rules, that will govern the arbitration.
- **The arbitration clause should be mutual.** The arbitration clause should not be one-sided. Rather, if an employer is requiring arbitration of the employee’s claims, the employer should be willing to have its claims arbitrated as well. Some courts have found one-sided clauses unenforceable. Having said the foregoing, an employer may want to carve out from the arbitration clause the right of the employer to go to court to enforce restrictive covenants and obtain injunctive relief for breach or alleged breach of those covenants.
- **Require enforceability of the arbitration clause be determined in arbitration.** Employees may try to challenge the enforceability of arbitration clauses for any of the reasons above. An employer can mitigate this challenge by requiring the employee to arbitrate any challenges to the enforceability of the arbitration clause.

Although there are some downsides to including mandatory arbitration clauses in the employment context, they can provide employers with several advantages. Enforceable agreements, however, need to be prepared with care. Employers should consult with legal counsel to discuss their specific situations, applicable state law, and, if they proceed with arbitration clauses, the preparation of enforceable agreements.

Whether arbitration clauses in the employment context are as beneficial as their wide use would suggest is still an open question. For employers that are rarely embroiled in litigation with their employees, it may not behoove them to create ill will with their employees by requiring arbitration. The point is, “if it ain’t broke, don’t fix it.” Arbitration clauses are no substitute for sound human resources policies and practices, nor do they insulate employers from all employment-related litigation. Federal and state agencies (such as the EEOC) can still pursue employers who violate the rights of employees. Employers may be playing with fire if they view arbitration as a way to constrain the rights of employees to raise concerns or to seek compensation when things go askew. Rather, employers should regard arbitration simply as an alternative method for resolving disputes that does not include the courts. 

This article is merely informational and does not constitute legal advice. You should contact an attorney about your specific situation or legal questions. **Paul King** is an associate with Chicago corporate and litigation law firm Funkhouser Vegosen Liebman & Dunn Ltd. You may contact Paul at (312) 701-6842 or pkking@fvldlaw.com.

The Rewards of Philanthropy:

How Your Organization Can Strengthen Its Mission—and its Bottom Line—Through Effective Fundraising

By **Rob Paterkiewicz, CAE**



Joe Skvara, CFRE

*Vice President,
Advocate Charitable Foundation*

Joe Skvara, CFRE, recently spent 10 years as vice president of the Advocate Charitable Foundation focused on fundraising operations. Previously, Joe worked for 20 years as senior vice president at the Marianjoy Foundation in support of Marianjoy Rehabilitation Hospital in Wheaton, IL, where he was responsible for all fundraising activities including two capital campaigns. Earlier, Joe worked as a fundraising consultant for Campbell & Company, a national fundraising consulting firm. Joe is a graduate of Indiana University and has served on the faculty of the College of DuPage's Academy for Nonprofit Excellence.



Doug Diefenbach

*Marketing and
communications
professional*

Doug Diefenbach, an accomplished marketing and communications professional, has spent over 30 years helping a wide range of nonprofit organizations to develop and then meet and exceed their goals for strategic alignment, brand visibility, constituent engagement and philanthropic revenue. Doug has served as senior vice president of marketing and philanthropy for the Alliance for Strong Families and Communities, a national network of 450 community-based human services organizations. Previously he worked in senior positions with the Advocate Charitable Foundation and with Lipman-Hearne, Inc., a national communications consulting firm. Doug graduated from Miami University of Ohio.



Marc Hilton

*Vice President,
Campbell & Company*

Marc Hilton worked for 25 years as vice president for Campbell & Company, a national fundraising consulting firm, where he headed the firm's professional society and association practice. Previously, Marc served as vice president at the Chicago History Museum and as Director of Development at Illinois Institute of Technology. Marc has been a faculty member for 12 years at Northwestern University's School for Professional Studies in its Nonprofit Management Certificate Program. Like Joe, Marc is a graduate of Indiana University. He also earned his MA at the University of Chicago.



Associations are paying increased attention to the development and fundraising efforts of their philanthropic subsidiaries these days. That only makes sense: The latest data from the Giving USA Foundation shows that more than \$410.02 billion was donated in 2017, spread out over nine major philanthropy sectors including Religion, Education, Human Services and Health. Individual donors—rather than corporations and foundations—gave 79 percent of this massive total, a percentage that has increased over the last several years. With that kind of money changing hands, it's no wonder associations want to know more about how they can financially benefit from those contributed funds.

My organization, a 501c6 trade group, established its charitable 501c3 entity, the Selected Educational Trust, back in 1982 to help support the educational needs of members. I serve as the administrative trustee for the group and over the years we have expanded the size of our Board, launched an annual fundraising event and scholarship program and have worked extensively to become self-sustaining and top-of-mind for our members and suppliers. We made gains over the years, but they simply were not enough. Two years ago, the boards of both the C3 and the C6 came together to decide our future. We agreed that first we needed to determine what would be of high interest to our members and ultimately get them to support our philanthropic arm. We conducted a combination awareness and feasibility study that has resulted in recommendations that we are now in the process of implementing.

During this study I learned how some C6 organizations are looking more intently to their C3 groups for benefits and even financial gains. C3 groups are also leaning heavily on their C6 counterparts to connect the members to their value, return and benefit. The whole process was eye-opening for me and in an effort to share the information, I sat down for a Q&A session featuring the insights of Marc Hilton, Joe Skvara and Doug Diefenbach, who represent Consultants in Association Philanthropy (CAP). Hilton co-led Independent Selected Funeral Home's well-received planning study.

FORUM: What are the possibilities and constraints for how associations can use philanthropy to support programs and projects?

CAP: Foundation contributions can be raised in many ways to help meet the diverse needs of associations and their members. These contributions, for example, can help provide continuing education, scholarships, publications, research, infrastructure and even capital investments related to education and fundraising operations. The primary limitation is that charitable funds cannot fund programs that benefit association members exclusively. For example, your foundation can underwrite your association conference as long as the conference accepts nonmember registrations, or can sponsor an awards program as long as honorees don't have to be members, etc.

Despite the "not for members only" limitation, philanthropic funds can enhance an association's value proposition on many levels. Contributions can't support absolutely every aspect of association operations—you can't use them to market association membership, for instance—but the high-profile, emotionally compelling programs funded by philanthropy add to the glow of association membership and create a vibrant environment that helps draw and retain members. A great example is the Society of Petroleum Engineers' Annual Distinguished Lecturer series

For the first time ever, charitable giving exceeded the \$400 billion mark in 2017, spurred by growth from all four sources of giving.

\$410.02 billion

Where did the generosity come from?*

Giving by Individuals ↑ 5.2% **70%**
\$286.65 billion

increased 5.2 percent (3.0 percent when inflation-adjusted) over 2016

Giving by Foundations ↑ 6.0% **16%**
\$66.90 billion

increased 6.0 percent (3.8 percent when inflation-adjusted) over 2016

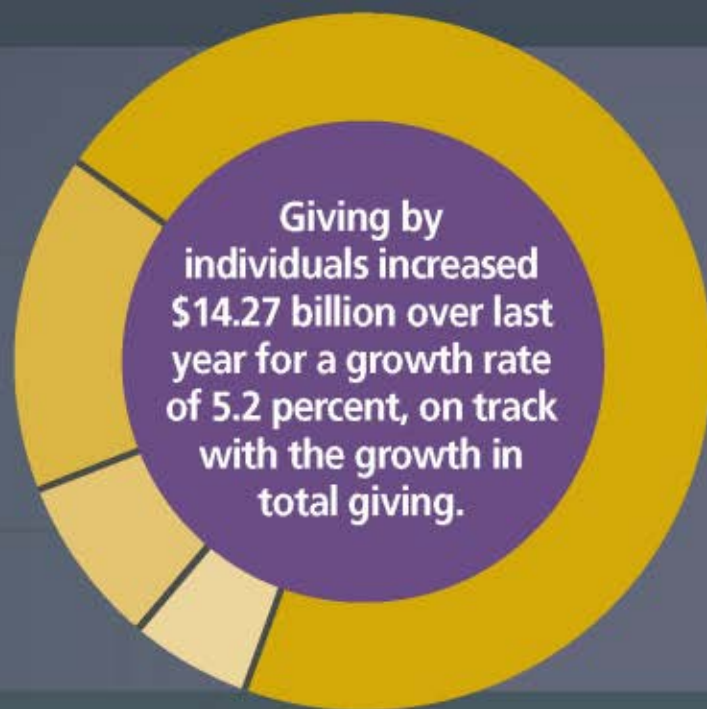
Giving by Bequest ↑ 2.3% **9%**
\$35.70 billion

increased 2.3 percent (0.2 percent when inflation-adjusted) over 2016

Giving by Corporations ↑ 8.0% **5%**
\$20.77 billion

increased 8.0 percent (5.7 percent when inflation-adjusted) over 2016

Contributions by source
(by percentage of the total)



Visit www.GivingUSA.org to learn more and to order your copy of *Giving USA 2018: The Annual Report on Philanthropy for the Year 2017*.

* All figures on this infographic are reported in current dollars unless otherwise noted.



Giving to arts was the second-fastest growing subsector, with an 8.7 percent increase over the previous year to a total of \$19.51 billion in 2017.



Giving to foundations increased 15.5 percent in 2017, the largest gain of any subsector, far outpacing the growth in total giving.

Where are all of the charitable dollars going?

(as a percentage of the total)

The 6 largest subsectors all grew in 2017, but growth rates ranged widely from 2.9 percent all the way to 15.5 percent.



31% Religion ↑ \$127.37 billion



14% Education ↑ \$58.90 billion



12% Human Services ↑ \$50.06 billion



11% To Foundations ↑ \$45.89 billion



9% Health ↑ \$38.27 billion



7% Public-Society Benefit ↑ \$29.59 billion



5% Arts, Culture, and Humanities ↑ \$19.51 billion



6% International Affairs ↓ \$22.97 billion



3% Environment/Animals ↑ \$11.83 billion



2% To Individuals ↓ \$7.87 billion

Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.



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that, via member gifts to the SPE Foundation, presents 450 programs each year.

FORUM: What urgency is ramping up fundraising among associations?

CAP: In a broad sense, the urgency revolves around “not being left out.” The nation is on the cusp of a tremendous intergenerational transfer of wealth, according to Morgan Stanley—up to \$150 billion will change hands from one generation to the next over the next 50 years. With so much at stake, savvy associations are seeing the wisdom in positioning themselves to benefit.

That’s the long view. In the short term, associations see their traditional revenue models undergoing change; a recent Association Forum survey confirmed that developing non-dues revenue sources are a top concern—one that philanthropy can help address. In an era when conferences are going virtual, publications are going digital and professional development is available from more sources, associations are recognizing foundations’ potential for engaging members more deeply with their organization and with each other, and thereby helping to attract and retain members.

In an increasingly competitive talent marketplace, every association wants to ensure a flow of top talent to its profession. Foundation-supported scholarships and fellowships help to achieve this by easing young professionals’ financial burden and by appealing to Millennials’ desire to make a difference in the world.

FORUM: What are the common stumbling blocks for association foundations that are not fulfilling their potential for raising funds?

CAP: Association foundations face an array of common challenges. Organizations may struggle to articulate the different roles of the foundation and the association or to communicate the basic charitable giving proposition. Will giving

advance the profession? Benefit society? Both? Even those organizations with a clear sense of self may have trouble identifying specific funding opportunities that members find meaningful and compelling.

Every foundation is required to have its own board of directors; issues frequently arise as the volunteer and staff leaders from both groups work out roles and responsibilities. Are foundation boards included at the strategic planning table? Is there a shared awareness that all volunteer leaders must donate before the rank and file can be expected to? Does the foundation have bandwidth in the association’s member communications and guaranteed access to the contact lists needed for solicitation? On any of these issues, association fundraising can misfire.

FORUM: Why should I be confident that my association members would give money beyond their annual dues? How can my organization appeal to their motivations?

CAP: While tax deductions can be part of the equation, to transcend mere membership and join the ranks of member-donors, members must perceive that their foundation support achieves something that their dues do not. In general, association members respond to appeals for programs that they believe will enhance their credentials, advance the profession or identify and prepare the next generation of talent. They may give out of gratitude for the profession’s role in their own quality of life, for the joy of collaborating with like-minded colleagues to better society or to leave a personal legacy. The last is especially powerful as Boomers—who may have benefited from decades of membership—face retirement and begin to reflect on opportunities to express their feelings of gratitude and to influence the next generation of professionals.

As with all nonprofits, there may be as many giving motivations as there are donors; the art comes in showing member-donors how they can fulfill their professional and emotional needs and

“Every association wants to ensure a flow of top talent to its profession. Foundation-supported scholarships and fellowships help to achieve this by easing young professionals’ financial burden, and by appealing to Millennials’ desire to make a difference in the world.”

express their values by supporting your organization’s programs.

FORUM: What role should my board have in advancing philanthropy in our association, and how should separate association and foundation boards coordinate?

CAP: It is impossible to overstate the importance of 100 percent giving by the organization’s leaders; their gifts—regardless of size—help signal the importance of the programs to be funded. But personal giving is not enough; leaders must also be willing to engage in prospect identification, cultivation and solicitation—sometimes leveraging their personal relationships for the good of the organization. Of course, instilling such a culture calls for strategy, patience and commitment, but in the absence of such activity, boards will have to limit their expectations for philanthropy; even the most energetic staff fundraiser is no replacement for volunteer leaders.

The growing importance of philanthropy means that association and foundation boards should always join forces when the “parent” association is engaged in long-range strategic planning, factoring in the foundation’s projected expenses and, perhaps more importantly, the anticipated income.

FORUM: What infrastructure elements are needed for a successful development program?

CAP: At their core, both associations and foundations are in the “relationship business;” both thrive on the engagement of individuals—members, and representatives of vendors and corporations. Because of this shared goal, the infrastructure needed by a foundation can often dovetail seamlessly with the association’s infrastructure

and capability to engage with the members and potential donors.

Typically, some sort of annual fund appeal (supported by regular communications about foundation programs) serves as the point of entry for donors. While this sometimes mail/email-intensive channel can be expensive in terms of the cost per dollar raised, annual fund loyalty feeds the pipeline for potentially far more cost-effective major and planned giving solicitations. That’s especially true when associations submit their membership and donor roles to electronic wealth screening. This relatively new process can pinpoint not only individual donors’ philanthropic capacity but their propensity to give as well, allowing for very sophisticated targeting of fundraising efforts.

Major gift solicitations hinge on strong personal relationships, which is why association foundations increasingly employ full-time professional fundraisers who can both advance relationships and guide the supporting efforts of board members. These staffers frequently report to the association CEO, but sometimes to the foundation board itself; there are advantages and disadvantages to both models.

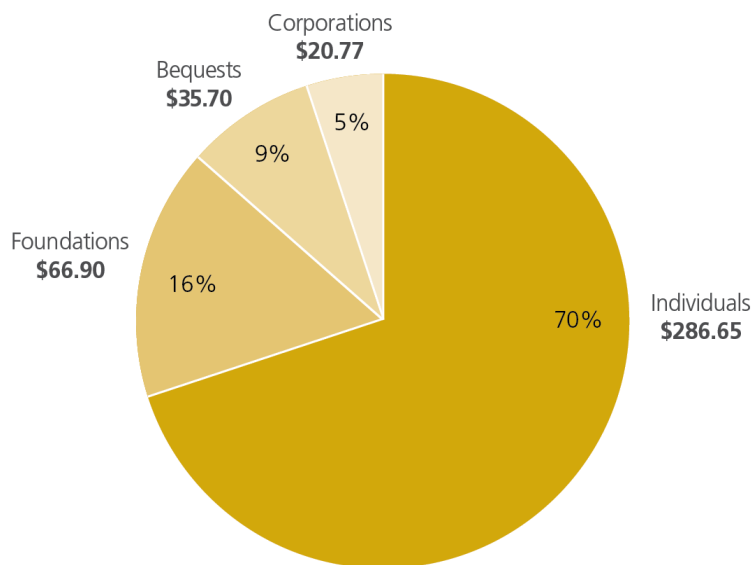
A caution: While infrastructure can be built relatively quickly, the payoff takes patience. Relationships take time to develop into major and estate gifts, but the wait is definitely worth the ROI—another reason to start now.

FORUM: How much payoff could a foundation expect, how soon, and for what size of investment?

CAP: That’s a complex question. The answer depends on many variables—the size and nature of the association constituency, the existing culture of philanthropy, the leadership giving potential of the organization’s governance, the strength of the organization’s communications channels and, indeed, the appeal and scope of the institutional vision and the existence of tangible, compelling

SOURCES OF CONTRIBUTED FUNDS, 2017

GIVING USA 2017, Giving USA Foundation™




*In billions – all figures rounded

opportunities for donors to make a difference.

There is no crystal ball that will provide an easy answer to this inquiry—except perhaps to say that, properly supported, any investment in philanthropy is likely to bring a positive return, and potentially a surprisingly large one. We believe that many if not most association foundations are falling far short of their fundraising capacity. Of course, while “your mileage may vary” disclaimers apply, these examples of big payoffs from our experience should tantalize any leader into finding out more about their own organization’s potential:

- Society of Petroleum Engineers Foundation (Richardson, Texas) planned, initiated and successfully concluded a \$5 million campaign to enhance www.spe.org, a website that serves its 158,000 global members and the worldwide oil-and-gas community. SPE’s campaign concluded by raising \$7 million, and in so doing significantly enhanced member engagement.
- American Academy of Orthopaedic Surgeons (Rosemont, IL) secured \$10 million in philanthropic support with its “Building Orthopaedics” capital campaign for a state-of-the-art Orthopaedic Learning Center and offices for AAOS and 25 affiliated orthopaedic specialty organizations.

FORUM: How do I discover my organization’s potential for philanthropic support?

CAP: Regardless of whether your foundation is sophisticated or a start-up, it helps to have experienced outsiders take a look under your organization’s hood. Association foundations such as Selected Educational Trust often engage CAP to conduct a capacity study, involving interviews with leadership and other existing and potential donors, an electronic wealth screening of the member database, a development program evaluation and communications audit. Such a study can dial in recommendations for improvement, a path for implementation, a prioritization of funding opportunities, suggestions on integrating foundation and association communications, and a welcome evaluation of the financial return that can be expected from an enterprising commitment to robust development program. 

Rob Paterkiewicz is the CEO of Selected Independent Funeral Homes and the immediate past-chair of Association Forum’s board of directors. He welcomes any feedback and examples you are willing to share on how your own groups are working together. He can be reached at robp@selectedfuneralhomes.org.

The team at Consultants in Association Philanthropy offers more than 120 years of combined experience in helping non-profit organizations, notably association foundations, maximize their philanthropic success. Learn more at www.associationphilanthropy.com.

Participation in the 2018-2019 Compensation & Benefits survey is now open!



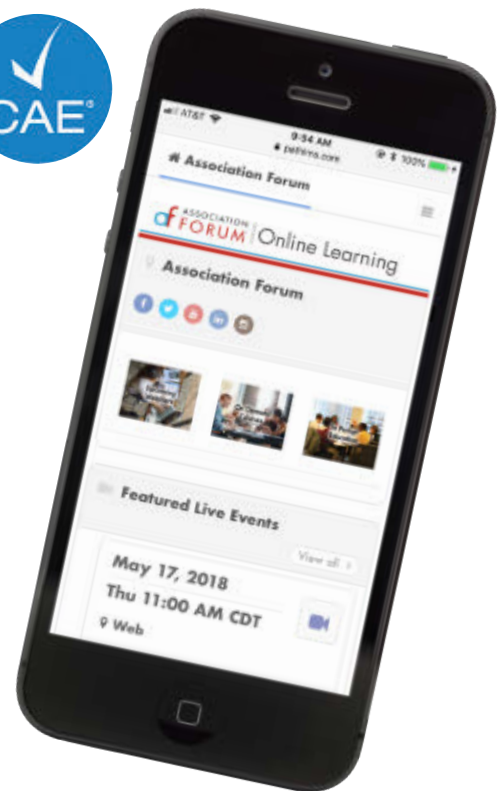
- ▶ Contact surveys@hrsource.org to receive your survey link, and order your member copy of the results for \$25 when you participate.

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Built upon a foundation of customer intimacy and mission-driven leadership, Association Management Center is passionate about and committed to furthering our client-partners' causes and helping them grow. A trusted partner to healthcare and other associations since 1974, AMC provides full-service management to leading national and international organizations. The strategic guidance, collaboration and vision of our leadership team combined with the expertise of our talented team members, creates an environment where our association partners live their missions, reach their goals and achieve what they believe.

Through our strategic consulting endeavors, AMC shares best practices and encourages good governance throughout the association

world. Our consulting practice, AMC Consulting Services, offers objective, practical and customized approaches that assist associations in achieving a wide variety of business goals and revealing new possibilities for their organizations. Consulting services include governance, strategic planning, board and staff development, market research, member needs, product development, content strategy and analytics, website development and design services.



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July 27, 2018
9 a.m. - Noon

This half-day workshop will present core governance practices with a focus on the "nuts and bolts" of good governance.

Presented by:



Mary Beth Benner,
CAE

Executive Director
Association
Management Center



Dave Bergeson,
Ph.D., CAE

Executive Director
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July 2018

JULY 11 **Finance SIG : What Every Exempt Organization Should Know About Tax Reform**
9 – 10:30 a.m.

JULY 17 **#2/COO SIG : Contracts for Non-Lawyers (What the COO Needs to Know and How to CYA)**
9 – 10:30 a.m.

JULY 19 **Exhibit Sales Roundtable**
8 a.m. – 4:30 p.m.

Exhibit Sales Roundtable (ESR) is a one-day facilitated workshop for executives, managers and professionals responsible for maximizing exhibit and sponsorship sales. ESR creates a high-energy environment for exploring exclusive research, exchanging field-tested sales tactics, and creating career contacts with a small group of forward-thinking peers. Every ESR attendee takes away action-ready tactics and insights for finding, closing, renewing, and upgrading customers and prospects.

JULY 19 **Webinar: Designing Your Digital Event Playbook to Drive Results**
11 a.m. – Noon

The digital space has proven to be a powerful strategic tool for associations as a way to engage members, increase your pipeline, extend your reach and attract the next generation of members. During this session, we'll explore how you can cultivate your own digital event strategy to drive your key business objectives.

JULY 24 **Membership SIG: MembershipFlix – Ideas for Using Video to Attract, Engage and Retain Members**
9 – 10:30 a.m.

JULY 26 **Fundraising SIG**
9 – 10:30 a.m.

JULY 27 **Governance Essentials: Effective Practices for Staff**
9 a.m. – Noon

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

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

August 2018

AUG 2 **Marketing SIG: How To's and Best Practices – Facebook, Twitter, LinkedIn and Social Media Platforms – Suburban Location**
9 – 10:30 a.m.

AUG 7 **Association 101: Rosemont**
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.

AUG 9 **Webinar: Project Management Best Practices to Maximize Your Productivity**
11 a.m. – Noon

During this presentation, we will discuss project management best practices to help you thrive in a workforce that is changing at a faster pace than any other time in history. We will also explore strategies for avoiding the common pitfalls that can derail your productivity.

AUG 14 **Association Management Essentials: Finance for the Non-Finance Professional**
9 a.m. – Noon

During this course, you will enhance your financial acumen by learning how to examine and analyze financial statements, discuss how to prepare and monitor a program budget and review Form 990. This course is designed for non-financial professionals and will give you the tools to manage a program or department budget.

Calendar Legend

● Education Events ● Shared Interest Group Events ● Webinars

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



September 2018

Register Now!

SEPT
11
NOV
27

CAE Study Group

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

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

SEPT
12
NOV
28

Suburban CAE Study Group

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

Increase your chances of passing the CAE exam by joining the CAE study group, which provides in-depth preparation for professionals preparing for the CAE exam. Facilitated by current CAEs, the study group meets weekly for a structured case-study series based on the nine domain areas.
1061 American Lane, Schaumburg, IL, 60173-4973

SEPT
13

Performing Under Pressure: The Science of Emotional Intelligence

9 a.m. – Noon

Focusing on managing your emotions under pressure, this program will enable you to increase your personal leadership by learning how to manage your emotional brain in your most difficult moments. This will allow you to influence and engage others, and connect with them in a more meaningful way.

CAE Study Groups



Downtown and suburban locations!

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Calendar Legend

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Promotions and Changes



Quick Leonard Kieffer has announced an Of Counsel relationship with **H. Stephen Lieber**. Lieber will assist the organization with executive search and client consulting, specializing in healthcare associations and professional societies. Lieber recently retired as CEO of Healthcare Information and Management Systems Society (HIMMS). During his tenure, he was recognized as one of the "100 Most Influential People in Healthcare" by *Modern Healthcare*. He was named Professional Association CEO of the Year in 2017 by *CEO Update* and was the 2015 recipient of Association Forum's Samuel B. Shapiro Association Executive of the Year award.



Michael Vega, MS, CAE, has been promoted to senior manager, education and digital content by Association Forum. He joined the organization in August of 2017 as the digital content strategist and has been instrumental in launching Association Forum LMS. Previously, he held positions at the Center on Halsted and the American Society for Surgery of the Hand. Vega has a Masters in Nonprofit Management from the Spertus Institute and is an association board member for the AIDS Foundation of Chicago.



Adam Natali has joined Association Forum as senior manager, marketing and communications. Natali joins the organization from the Academy of General Dentistry (AGD), where he held a number of marketing positions, most recently as a manager, marketing. Previously, he worked for Groupon and Barrett's Technology Solutions. Natali has an Masters of Business Administration in Marketing from Saint Xavier University.



Shawn Randle has been promoted to education coordinator for Association Forum. Randle was previously the office concierge, assisting with the management and execution of events at the Association Forum offices. Randle has over 20 years of experience in customer service and has worked for BMO Harris and the Luxotica Group, SpA. In her new role, Randle will support all educational programs and events produced by Association Forum



The National Automatic Merchandising Association (NAMA) has hired **Ushma J. Suvarnakar, MTA, CMP**, as director, meetings and events. Prior to joining NAMA, Suvarnakar was the director, meetings and conferences at the American Anthropological Association. She has been recognized in the industry as a PCMA Distinguished Emerging Leader of the Year and as a recipient of Connect Magazine's 40 Under 40 Award. She was also named by Association Forum as a Forty Under 40 in 2016.

News and Awards



The Events Industry Council has selected **Henry Givray** and **Deborah Sexton, FASAE** to its Hall of Leaders in recognition of their lifetime of contributions to the meetings and events industry. Sexton was the president and chief executive officer of the Professional Convention Management Association (PCMA) for more than 12 years before leaving the organization in 2017. Givray is the chairman of the board of directors for SmithBucklin and previously served as president and CEO of the organization. Both Sexton and Givray have both been awarded the Samuel B. Shapiro Award, Association Forum's highest honor bestowed on association professionals. They will be inducted officially on October 16 in Las Vegas at the Hall of Leaders and Pacesetter Awards Celebration during IMEX America. A bronze plaque will be hung in their honor at McCormick Place.



Jacqueline Price Osafo, CAE, has been named by the American Society of Association Executives (ASAE) as a 2018-20 Diversity Executive Leadership Program (DELP) scholar. Price Osafo is the director, membership and development for the Water Quality Association (WQA). DELP scholars participate in an accelerated leadership program of education, mentoring and volunteer service in the association community. Price Osafo was the 2017 recipient of Association Forum's Association Professional of the Year.

New Association Forum Members

Individual Members

Beth Aldana, Government Finance Officers Association

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Christina Miller, Visit Frisco

Katie Moore, American Board of Oral and Maxillofacial Surgery

Jeanine M. O'Dowd, Business Events Canada

Cortni Bronson Randazzo, Canal HR

Rich Reising, PeerSpace

Thomas Rosenfield, JD, HillStaffer

Lori Schiavo, Refrigeration Service Engineers Society

Michael Stewart White

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Anna Williams, Atlanta Convention & Visitors Bureau

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Vayram Nyadroh and **Angela Tobin**, American Academy of Pediatrics

Samantha Luebbering, American Association of Neurological Surgeons

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Mary DiCarlo, American Association of Oral and Maxillofacial Surgeons

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Jeanette May, American College of Foot and Ankle Surgeons

Christopher Cherry and **Readus Sago**, American College of Healthcare Executives

Susan Carlson, American Epilepsy Society

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Molly Murray, American Medical Association

Dustin Calliari, **Ariana Hampton-Marcell**, **Karen Kazmierczak**, **Sally Lambertson** and **Molly Walsh**, American Planning Association

Ashley Alexander, American Society for Dermatologic Surgeons Association

Kathleen Howard, American Society for Healthcare Risk Management of the AHA

Katie Wochos, American Society of Anesthesiologists

Joyce Chacko, American Society of Safety Engineers

Therese Weiss and **Rita Wirth**, Association Management Center

LaShay Sydnor, CCIM Institute

Shelley Graff, Conference of Consulting Actuaries

Lavonia Swanson, International Association of Lighting Designers

Phyllis Coneset, **Kirk Hansen** and **Barbara O'Connor**, Million Dollar Round Table

Tom Bagsarian and **Christopher Hurst**, Precast/Prestressed Concrete Institute

Sharon Allen, **Michael Borgeson**, **Bethany Brewer**, **Kelsey Redman**, **Joshua Reinhardt**, **Robert Sisco**, **Will Taylor** and **Carrie Wall**, SmithBucklin

Kara Mercer, Society of Critical Care Medicine

Michelle Anderson, **Erin Fleming** and **Andrea King**, Society of Surgical Oncology

Dominique McClay and **Stacey Williams**, Turnaround Management Association

Monica Sanchez, Water Quality Association

Forum Plus Organizations

American Association of Medical Assistants

American Association of Neurological Surgeons



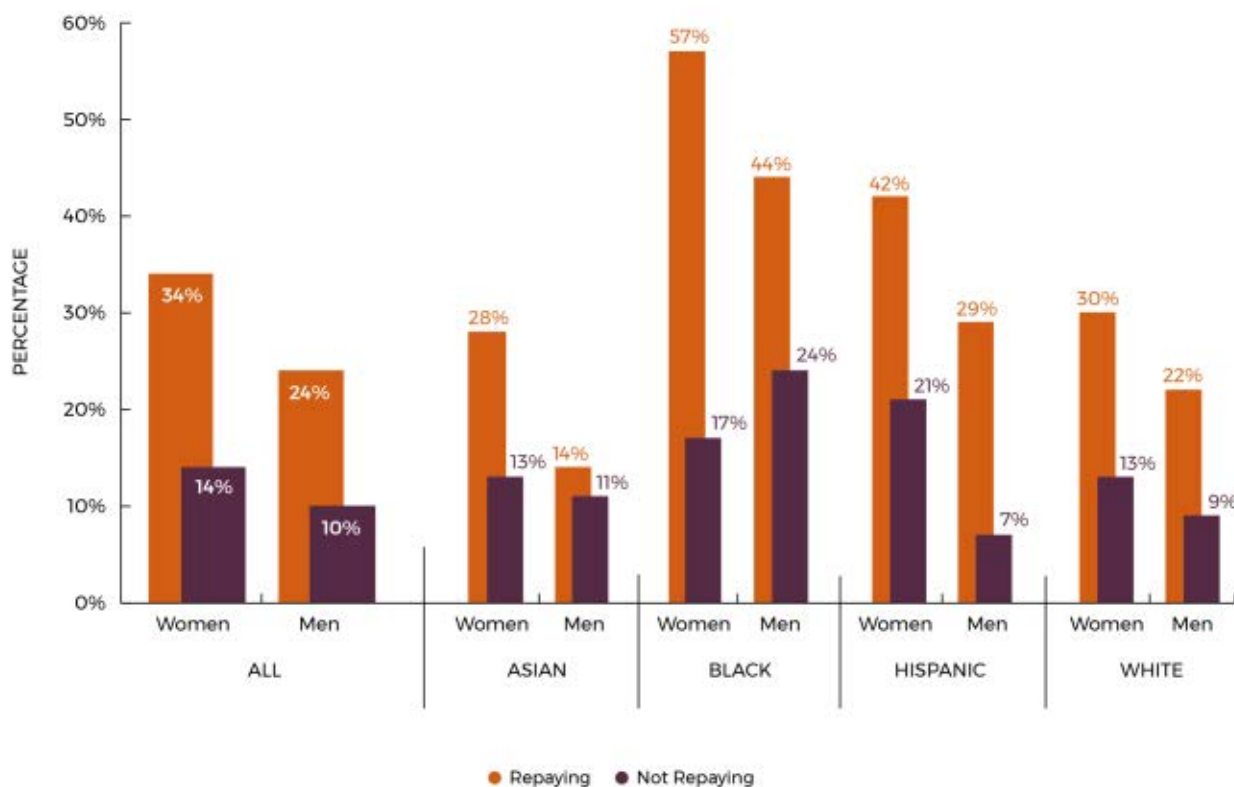
To access AAUW's "Deeper in Debt: Women and Student Loans" visit the digital or mobile versions of *FORUM*.

How Student Loans Became a Women's Issue

The American Association of University Women recently released "Deeper in Debt: Women and Student Loans," a research study which reveals that two-thirds of outstanding student loan debt belongs to women. In general, the burden of student loans has ballooned among college graduates as the cost of higher education has risen dramatically over the past 40 years. Coupled with the gender wage gap, that burden lies disproportionately on the pocketbooks of women as they have less income with which to pay off their debt.

One positive statistic from the study is that 56 percent of enrollees in American colleges and universities in fall of 2016 were women, a positive development in a nation that once discouraged women to even consider college enrollment. That statistic contributes to the higher amount of debt belonging to women, however the previously mentioned gender wage gap and the fact that women, especially women of color, tend to take on larger loans leads to the more lopsided debt figures. Immediately following graduation, the gender wage gap is at its lowest, with women who work fulltime making 18 percent less than their male counterparts. Within four years, that gap increases to 20 percent. The result of unmanageable debt can be catastrophic for graduates. In total, 3.5 percent of women default on their loans within four years of graduating, compared to 2.4 percent of men.

Figure 11. Percent of College Graduates Experiencing Financial Difficulties by Race, Gender, and Loan Repayment Status



Source: AAUW analysis of U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics, Baccalaureate and Beyond Longitudinal Study 2008/12 data.

Note: "Not repaying" includes students who never had loans or had completed paying them off. "Repaying" includes only those students who were making payments, not those in deferral or default.

Note: "Financial difficulty" means that at some time in the past year, the respondent was unable to meet all essential expenses.

Bank of America Merrill Lynch is proud to sponsor this content on women's issues in conjunction with Association Forum's Women's Executive Forum.

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Source: American Association of University Women's "Deeper in Debt: Women and Student Loans"

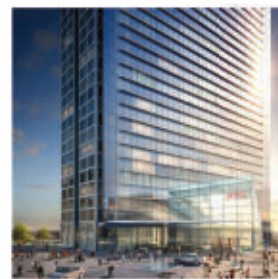


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