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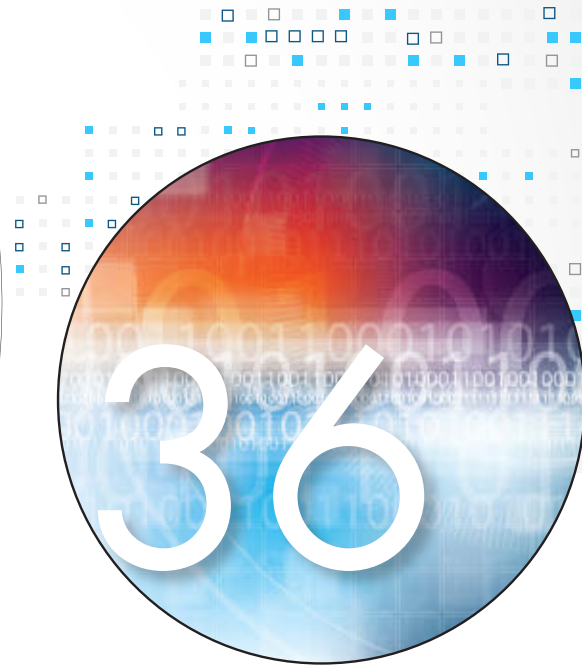
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Correction:

In the September issue of *FORUM*, the Strategic Account Management Association (SAMA) was incorrectly referred to as the Strategic Account Managers Association.

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Technology as a Strategy

As I think about the Technology issue of FORUM, I stop and ponder my own personal experience with technology. Being admittedly a novice in this area, the articles in this issue help me to realize the strategic importance of staying abreast of trends and the professional need to be a perpetual student. As they say, you don't know what you don't know.



Michelle Mason,
FASAE, CAE
President & CEO
Association Forum

Technology is a driver of change, and as the speed at which technology progresses increases, so does the change it enacts. Honestly, I am doing my best to keep up and assess what deserves my attention, because I realize the value and strategic advantage that technology brings in connecting and engaging diverse audiences in the digital age.

Think about the definition of an association: "A group of people banded together for a collective purpose." With that in mind, I am focusing on the need to shift my thinking to embrace technology as a strategy, not just a tool. It was this line of thinking that led Association Forum to create the SmartTech Conference, the second annual of which will be held on January 30, 2019.

In our cover story, The Impact of Digital Transformation, you will read insights from four association executives on how their organizations are transforming digitally. The article explores how digital transformation is now operational as Artificial Intelligence and Privacy take a front seat in technology strategy.

In the Spotlight explores How Analytics Drives Future Content Today. Three years ago, Association Forum introduced a content strategy to identify content areas relevant to members. The strategy allows us to review analytics to make business decisions based on member personas central to their current needs.

We are also featuring an article, Data Governance: How to Effectively Structure a Data Culture. Big data is the latest craze. What does it mean? How do you process, manage, understand, yet try to explain it? Establishing a data culture will help us to mitigate data paralysis and unleash a culture of decision making.

The one thing I know for certain is that the world is changing, and technology is a key driver. For me, the question is not "when?"—It's "How?" I am reminded of a quote: "Today's decisions are tomorrow's realities, life today is a collection of choices made yesterday."

Today, let's choose to embrace technology as a strategy. (Of course, "How" is another story.)

Michelle Mason



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When asked about the invention of the automobile, Henry Ford said, "If I had asked people what they wanted, they would have told me faster horses."

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

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A New Chapter for Customer Service

By Dan Shea

It was on a whim that Stephanie Leese Emrich first attended the annual conference of the National Customer Service Association (NCSA). In late 2016, she received an email inviting her to the event in Orlando. Normally, Emrich attends these types of meetings as a speaker, but this time she would be there just to take in the sights and learn from her peers. For three and half days, she met with individuals from all over the United States who shared her passion for the customer experience, but she noticed something odd. It seemed nobody was there from Chicago. The nation's hospitality capital didn't have a chapter. So, as soon as she got home, she went to work on what would become the NCSA Chicagoland.

Emrich had previously started two other associations, the Regional Directors of Sales (RDOS) and the Chicago Dance and Music Alliance. With the NCSA Chicagoland, there was the benefit of having a national organization with existing branding and infrastructure, though the chapters are run relatively autonomously. The missing piece was the people who would make this venture a reality. Emrich called up 15 colleagues from a wide range of industries—hospitality, manufacturing, retail, academia—and invited them to a casual meeting at Water Tower Place. “All 15 said yes and all 15 showed up,” says Emrich. With that, the NCSA Chicagoland chapter was off and running.

It was important to Emrich that the board members come from a variety of industries and positions, because customer service doesn't just exist in hospitality and service industries. This sentiment is echoed by NCSA Chicagoland's director of membership, Roxy Goebel. “Any job is customer service as far as I'm concerned,” she says. Goebel is a long-time colleague of Emrich, having served together on a number of non-profit boards including the Art Institute's Auxiliary Board.

“The vision is celebrating and honoring and justifying the role of customer service in any organization,” says Emrich. “Where the organization has legs is networking, providing educational






opportunities and giving a completely different lens to customer service.”

For seasoned veterans of the hospitality industry like Emrich and Goebel, service is second nature. Emrich herself has a storied history in customer service. Her day job is president and chief service officer of ServiceSpeaks Solutions, through which she transforms customer experience cultures from transactional to experiential. She has worked in sales leadership positions for a number of Chicago hotels, from the Drake to the Swissotel, later making the switch to concierge after discovering that she missed the face-to-face interactions she had as a front-of-house hotel manager.

At the beginning, Emrich and her cohort depended on their strong network of relationships to build membership and event attendance, but organic growth soon began to have a positive effect. When Chris Raleigh, a 25-year veteran of Fuchs Lubricants, was appointed manager, customer solutions at the company, he found a need to bolster his service abilities. “Even though I was very familiar with our organization and what we’ve done over many years, customer service itself was something that was relatively new for me,” Raleigh says. So, on the recommendation of his boss, he sought out an organization that could help him build that skill-set. By way of a Google search, he found the NCSA Chicagoland.

“I was looking for something that could provide me with the ability to look outside the box and look for best practices in other organizations, so I could bring that knowledge back to my organization,” he says. With NCSA Chicagoland, he found that and more, building strong connections with the com-

munity and eventually hosting an NCSA Chicagoland event at the Fuchs Lubricants OEM grease manufacturing plant in Harvey, IL. The event, attended by around 30 NCSA Chicagoland members and guests, featured educational presentations from Dr. Mattias Ostertag, Fuchs’ vice president of OEM sales and Lars-Eric Reinert, the plant director, as well as a session on email etiquette from Raleigh himself. The event concluded with a private tour of the facility, normally off-limits to the public.

Two years in, the NCSA Chicago has grown from a casual breakfast meeting to a full-fledged 45-member association chapter. As of October 2018, they’ve hosted 20 well-attended meetings and recently held their second annual awards ceremony at the lofty Mid-America Club. The key to continued growth, according to Emrich, is flexibility and proactively designing the member experience to the needs of the members. 

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

Data Governance: How to Effectively Structure a Data Culture

By Niles Chandra, Jenna Phillips, and Jennifer Zheng

Privacy regulations, such as the European Union's "right to be forgotten," HIPAA, and the new California consumer privacy law, add significant responsibility and risk to organizations that handle data. As data is shared across a variety of vendors, partners and systems, each shared connection creates vulnerabilities that can be exploited. Each new connection and process creates a requirement for ensuring regulatory compliance and updates when regulations change. Security breaches and ransomware attacks such as WannaCry have left critical health systems exposed and threatened the personal health information of millions of users.

These factors mean that associations are turning to data governance to facilitate secure information flow and gain valuable insights.

As stewards of large amounts of individual data, associations have the obligation to ensure data is handled in a safe, effective manner and implement operational processes that are compliant and adaptable to face an evolving regulatory environment. While a large amount of data is available, from members, transactions, and registries, often the data isn't strong enough to draw insights from for a number of reasons. First, associations do not have complete datasets, often lacking even basic information such as member practice locations. Second, data is created in siloes, by different departments on different systems and for different purposes. And third, many of these systems and processes have evolved over time and are not compatible with each other, creating a somewhat haphazard overall architecture. Without a single source of truth and robust quality controls, there is not enough reliable data to draw meaningful insights.

There are seemingly competing priorities between the need to utilize the data available and following data privacy regulation and standards. Effective data governance allows you to manage these two priorities, providing structure to support data consolidation, quality, and protection. By identifying current data management practices, developing a data governance framework and integrating this framework into the culture, you can take advantage of the disparate data sources to create a better understanding of specialties.

In the rest of this article, we highlight the benefits of effective data governance, demonstrate what

effective data governance looks like, and share a practical approach to implement it.

A Practical Approach to Implementation

Data governance often requires organizational change, which can be a difficult sell to people. Change is uncomfortable and complex—it means a different way of processing and interacting with data. However, it's essential to success and requires defining the why, what and how of data governance. To make this change effective, data governance needs senior leadership support, where leadership recognizes that current business practices need to change.

Data governance may also appear as a one-time fix for a singular, isolated problem. However, the needs of the business and IT will change over time and you need to be flexible. Successful data governance brings together people, process, policies, and technology, providing structure while staying adaptable to changing requirements.

The following key questions are essential to ask before an implementation program:

- 1. WHY do we need data governance?** Do your colleagues understand the need for data governance? Does good data management and governance address recurring pain points, align to business goals or support strategic initiatives? The case for change must be defined, communicated and made essential. Success depends on awareness, support, and participation from all levels of the organization.
- 2. WHAT does effective data governance look like for us?** Governance requires discipline across

“Data governance is a system of decision rights and accountabilities for information and related processes, executed according to agreed upon models, which describe who can take what actions with what information and when, under what circumstances, using what methods.”

– The Data Governance Institute

people, process, policies and technology. You need to establish roles, responsibilities and controls so people know who to go to for data issues and questions. Do you know what all your data sources are and how they relate to each other? Who are your data governing bodies and what are their responsibilities? Data governance will look different for every society; what's important is that data is a valued asset, a shared responsibility, managed carefully and fit for purpose.

3. **HOW are we making it happen?** Data governance needs to be sustainable. This means putting policies and standards to practice, such as data cleansing standards, change request management and data dictionaries. Embed a cycle of continuous improvement, striving for greater data quality, insight and security. This involves implementing process controls, metrics, reporting and a culture where mistakes are accepted and improved upon.


Remember, data governance is not a one-time solution, but an ongoing commitment. You need to create and garner support for a case for change, define a data governance framework that fits your needs and culture, put in the policies and standards to implement the framework and drive continuous improvement to create sustainability.

The Benefits of Effective Data Governance

Associations are well-positioned as the central collector of information for their specialty areas; they have access to data across payers and providers and are the thought leaders in their area. Associations that put in the effort to create an effective data governance benefit from:

- **Quality data set.** Data governance puts a framework in place to increase data accuracy and validity. There is now a single point of authority for data decisions and a point of escalation for data-related problems, issues and requests. Data governance means societies can have more accurate member data, less redundant information and more confidence in the data available.
- **Removed information siloes.** Information siloes, such as conference registration data on a spreadsheet, lead to a fragmented and incomplete understanding of your operations. Shared data means that there is a single source of truth, which increases transparency and opportunities to learn across your organization. As a result, it is easier to create reports and support decisions based on clear facts.
- **Useful data registries.** Once data is a priority for all levels of the organization, the culture will value data and understand its importance. Societies can create data registries to measure quality across providers, build additional guidelines for health professionals, and improve medical training and education.

What Does This Mean to You?

So how do you get started? Effective data governance starts and ends with the data. The type, purpose, mindset and continual management of the data that is required, is foundational to data governance. Understand what kinds of data are available, how it is managed, and where it is stored. Be prepared to address how your data furthers your mission and is impactful to members. Data governance, when implemented effectively, can provide societies with critical insights into their specialties, areas for improvement in internal operations and opportunities to expand their offerings. 

Nilesh Chandra is partner, healthcare for PA Consulting. **Jennifer Zheng** and **Jenna Phillips** are healthcare consultants for PA Consulting.

To Record or Not To Record: That is the Question

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



Q: On advice of counsel, my association no longer records its board meetings. Can I record them on my own? Can I record other conversations that take place outside the board room?

A: The advice of your legal counsel is sound. It is never a good idea for an association to record its board meetings. The board's official, well-drafted minutes should be the only record of the actions taken at the meeting.

It is equally problematic, if not worse, for an individual director to record a board meeting. Among other things, a director's fiduciary duty of loyalty to the association gives rise to obligations of confidentiality that prohibit any one board member from recording the comments of other board members at a board meeting. Those duties, however, are not the only relevant concern. In fact, depending on the circumstances and applicable state law, it may be illegal for directors to record board proceedings on their own.

Thirty-five states, along with the District of Columbia, have adopted what are referred to as "one-party consent" statutes regarding the recording of otherwise private conversations. The net effect of those statutes is that an individual can record almost any conversation to which he or she is a party (i.e., the individual doing the recording is the "one

party" providing consent). Not all states, however, have "one-party consent" statutes. Of particular note, the Illinois statute on recording phone calls and other conversations is one of the most restrictive "all-party consent" laws in the nation. In March of 2014, the Illinois Supreme Court struck down an earlier version of the law because its broad coverage encompassed conversations in public places in which there was no reasonable expectation of privacy, including public encounters with the police. The replacement legislation, known as the Illinois Eavesdropping Act enacted in December of 2014, focuses more on "private conversations," but continues to impose significant criminal felony and civil penalties for any violations.

In essence, the revised Illinois anti-eavesdropping law prohibits the use of an "eavesdropping device" in a "surreptitious manner" to record a "private conversation" unless consent is obtained from all parties to the conversation. In that regard, Illinois differs from the majority of other states that require the consent of only one party to an otherwise private conversation before a recording can be made lawfully. By contrast, in "all-party consent" states such as Illinois, it is illegal to record any private conversation unless all parties have consented. In the context of a board meeting, it is important to remember that "all parties" include not just all the other directors, but also the association staff and any other individuals participating in the meeting.


While most of the definitions in the Illinois law are clear, certain of them are am-

biguous and therefore present an unknown level of risk. For example, an "eavesdropping device" includes any device capable of being used to hear or record an oral conversation, which is clear enough. In contrast, however, a "private conversation" means any oral communication between two or more persons "when one or more of the parties intended the communication to be of a private nature under circumstances reasonably justifying that expectation." That definition includes a number of uncertain and partially subjective terms. Similarly, the term "surreptitious" is defined to cover the situation where a recording is "obtained or made by stealth or deception, or executed through secrecy or concealment." Again, just as in the case of a reasonable justification of privacy, what amounts to stealth may differ among the various parties to a conversation.

Notwithstanding the ambiguous nature of a few terms in the Illinois statute, it is relatively easy to categorize certain actions as lawful or not. For example, it would be unlawful for association staff or members to record non-public conversations with other staff or members without their consent. In addition, it would be unlawful to record non-public meetings or conference calls without the consent of all participants. The conclusion would be different, however, if those meetings or conference calls were open to the public, since that would undercut the reasonable expectation of privacy. Similarly, if a person recorded an otherwise private conversation in an open and non-surreptitious manner (i.e., through showing one's

phone and stating that it was in "record" mode) without objection from the conversation's participants, that likely would be considered lawful.

Finally, irrespective of statutory requirements and fiduciary duties, significant non-legal social and political issues affect the appropriateness of recording conversations without permission between and among association members (including directors), association staff, and association members and staff. In essence, even when individuals technically can record a conversation without the consent of all involved, they should seriously consider whether they should. Such action could have significant and long-lasting negative effects on interpersonal relationships, as well as on one's reputation and trustworthiness.

On balance, then, it is prudent to err on the side of assuming that most conversations in a non-public setting should not be recorded without everyone's permission. The potential consequences of making incorrect assumptions about others' expectations of privacy are too severe to warrant making recordings when contemporaneous notes of a conversation's most salient points will usually more than suffice. 

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.

Call for Nominations for Open Positions on the 2019-2021 Association Forum Board of Directors

Please read the Call for Nominations carefully and in its entirety to ensure full understanding of the process. All recommendations for nomination and any information collected as part of the process are strictly confidential.

In 2019, Association Forum's Nominating Committee will elect two association professional members and one industry partner to serve on the Association Forum Board of Directors for the term spanning 2019-2021.

We encourage you to nominate qualified candidates.

Board member duties are as defined in the Bylaws, Article V: Board of Directors.

Bylaws Article V: BOARD OF DIRECTORS

Section 1. Authority and Responsibility. The affairs of the Forum shall be managed by the Board of Directors, which shall have supervision, control, and direction of the Forum, shall determine its policies or changes therein within the limits of these Bylaws, shall actively promote its purposes, and shall have discretion in the disbursement of its funds. The Board of Directors may adopt such rules and regulations for the conduct of its business as shall be deemed advisable and may, in the execution of the powers granted, appoint such agents as it may consider necessary.

Section 2. Composition. The Board of Directors shall be composed of thirteen (13) voting members as follows: Chair, Chair-Elect, Secretary-Treasurer, Immediate Past Chair, six (6) additional Regular Members (collectively, "Regular Member Directors"), and three (3) Supplier Partner Members (collectively, "Supplier Partner Directors"). In addition, the President & Chief Executive Officer shall be an ex-officio, non-voting member of the Board.

Section 3. Qualifications. Only Regular Members and Supplier Partner Members shall be eligible to serve on the Board of Directors.

Section 4. Term. Officers shall serve a one (1) year term in office, or until such time as their successors are duly elected, qualified, and assume their position. Directors shall serve a three (3) year term in office, or until such time as their successors are duly elected, qualified, and assume their position. In order to provide for a staggered term, two (2) Regular Member Directors and one (1) Supplier Partner Director shall be elected each year. Officers and Directors shall take office on April 1 of the year in which they are elected. Terms shall run from April 1 to March 31, or until such time as successors are duly elected, qualified, and assume their position. Regular Member and Supplier Partner Directors completing a full term in office shall not be eligible for re-election to the Board until at least one (1) year has elapsed. Notwithstanding the foregoing, Regular Member Directors completing a full term in office shall be eligible for election as an Officer of the Forum and may serve on the Board in such capacity.

Section 5. Manner of Election.

a. Nominating Committee Recommended Slate. At least sixty (60) days prior to April 1 of each year, the Nominating Committee shall recommend a slate of qualified candidates to the Board of Directors to fill each seat on the Board of Directors that is either vacant or set to expire. Members of the Nominating Committee are ineligible to stand for election to any office.

b. Publication of Slate. The Nominating Committee's recommended slate shall be announced to all members.

To learn more, visit www.associationforum.org or contact executiveoffice@associationforum.org.

Timetable and Key Actions

November 23, 2018: Completed applications are due by 11:59 p.m. CT

December 21, 2018: Members selected for interviews will be notified.

January 18, 2019: Candidate interviews are conducted

March 20, 2019: Board of Directors approves 2019-2021 Candidate Slate

March 25, 2019: Approved Slate for 2019-2021 is announced to members



How Analytics Drives Future Content Today

By Christoph Sisson

Experiment.

That seems to be the core theme of four association professionals regarding how they're using analytics to determine future content for their online, mobile and print channels.

Katie Domanowski, director of communications for The American Academy of Dermatology (AAD)), summed it up well when she said, "Sometimes you just need to try things to see what works. That's what is great about being in the digital era. You can see where to apply your resources to gain the results you desire."

Associations rely on quality content to stay relevant to their members. Creating that content is time and resource intensive, things that are true challenges for associations with modest budgets and small staffs. Add to this the complexity of creating content for multiple audiences across multiple channels, and you have a potentially overwhelming task on your hands.

This is why many association publishers turn to analytics to identify the content areas and specific topics most likely to engage their members and provide valuable information to the general public.

But, since the analytics toolset currently available is still maturing, the promise of directive insights can seem elusive.

For instance, what if your audience is largely invisible from an analytic standpoint?

This is exactly the issue for American Health Information Management Association's (AHIMA) international audience.

Cheryl D. Cato, senior director of international marketing for AHIMA World Congress, AHIMA's international arm, says that while their most popular website area has consistently been related to their certifications and credentialing, AWC struggles to get good data for all the countries it serves.

"We would like a tool that assimilates data from across a variety of channels so we can understand which content topics are resonating with our audience based on what area of world they are consuming it," says Cato.

Until that tool exists, AWC continues to get good insights from a variety of mechanisms. Like many organizations, they evaluate website, email and social media metrics, such as visits, opens, clicks and shares. And they rely on participant feedback through surveys at their quarterly training

events held in the countries where AWC currently has chapters.

In addition, AWC utilizes old-fashioned ear-to-the-ground information gathering by listening to feedback from chapter steering team members, who are consistently monitoring key areas of interest and concern among the healthcare professionals in the various regions of the world they represent.

At the Society of Actuaries (SOA), Julia Anderson Bauer, publications manager, and Michael Nowak, senior content specialist, face a triple challenge. The SOA serves three audiences with its content: more than 31,000 actuary professionals, 44,000 candidates preparing for actuarial exams, and the general public.

Bauer shared that SOA primarily relies on click-and-share data as their key analytic metrics. Since actuary topics can be highly technical, the SOA has been working to leverage these metrics to develop a more conversational interaction with the general public.

And, since the SOA's recent experiment with a microsite for *The Actuary* magazine (www.the-actuarmagazine.org) was so successful at growing readership, they're now looking for ways to duplicate that success in other areas. For example, they're currently experimenting with their @soactuaries Instagram channel to engage members in a more personal way, with the specific goal of creating a greater sense of belonging.

But, like AHIMA, the SOA has bumped into the shortcomings of available analytic toolsets. "We have visibility of initial clicks and shares, but lose visibility of what happens with the content after it's shared," says Nowak.

He goes on to describe a highly manual research project the SOA undertook with the help of a public relations firm which determined that media coverage of their targeted content generated an astounding 1.4 billion media impressions in news articles during 2017. The SOA would like an analytics toolset that provides greater digital automation as well as more efficient tracking of media coverage, social media shares and related use of its

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content.

Back at AAD, Domanowski admits they are still on a learning curve regarding how to use analytics to drive engagement effectively. They have used analytics to verify that buzzwords like “FDA approval” drive open rates and improve click-through potential. But, they are still developing their engagement measurements for video content by monitoring overall views, partial views and complete views.

For online content, AAD is relying on time-on-page and bounce rate metrics to measure topic engagement. This enabled them to identify seasonal patterns of a topic’s popularity with their public audience. Not surprisingly, the topic of dry skin is very popular during winter, and the topics of poison ivy and sunburn are popular during summer. More critically though, these analytics enabled AAD to identify that articles focused on remedies and problem solving were far more popular than articles that simply provided general information.

Domanowski has two items on her analytics wish-list. Now that AAD is providing interactive tools online for dermatology professionals, they would like better visibility into what marketing promotions drive both visits and tool use. Correlating the two is presently a challenge. They would also like better visibility into whether or not members are following the anticipated click paths AAD marketing staff has devised.

Domanowski and Bauer both shared surprises that analytics provided.


For AAD, a surprise came from an experiment offering more content in video format. After doing a series of short videos on a topic of known interest, which featured other AAD members talking to their peers, they were surprised to find that members preferred to scan the narrative text on the page rather than watch the videos. Despite some disappointment at the low view rates, AAD was happy to learn more about their audience’s content consumption preferences.

For the SOA, the surprise came with a topic area brainstormed by their editorial board. When they met to create *The Actuary* magazine’s annual

content calendar last year, the editorial board selected several industry-specific topics like they normally do. But they also selected a few “soft” topics such as communication, interview etiquette, and diversity and inclusion, which aren’t specific to actuarial professionals.

The surprise? The soft topics turned out to be quite popular with their professional audience.

“We believe this is due to the SOA being a trusted source of information, the day-to-day applicability of the topics, and the fact that these topics aren’t being covered elsewhere with actuarial professionals specifically in mind,” said Bauer.

Without an appetite for experiments or the analytics to assess them, these content professionals probably wouldn’t gain new insights to more effectively focus their content creation efforts. 

Christoph Sisson is a marketing and customer-experience practitioner who is committed to understanding customer needs and business objectives. As marketing manager for Walsworth, Christoph enjoys informing customers about solutions that can improve their success. You can subscribe to the monthly newsletter he writes for Walsworth at www.walsworth.com/news.



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Boards Must Lead by Example to Prevent Sexual and Other Harassment

By Jon Vegosen

When it comes to preventing sexual and other harassment, the board of directors of a corporation, association or other organization must set an appropriate tone for the culture and conduct meaningful oversight. The board also must be willing to hold both executives and fellow directors accountable for inappropriate behavior.

As recent corporate scandals have shown, a lack of board oversight can result in both top executives and board members being the most problematic perpetrators of harassment. It is critical that boards make clear to executives and board members that their organizations will not tolerate sexual or other harassment by anyone—including executives and directors of the organization.

Below is an unfortunate hypothetical example where both the board and executives failed an employee and the organization. Following the example is a checklist of the kinds of steps that a board may want to consider undertaking to ensure that board members and executives take harassment prevention seriously and that they hold those who do not accountable.

An Unfortunate Hypothetical Example

The entirely white male board of directors of a trade association and its managerial staff attend a three-day conference. On the first evening, several of them gather at the hotel bar for a few drinks after dinner. One of the directors, Joe Jones, has a few too many, and he starts telling inappropriate jokes. Some are of a sexual nature, while others degrade various ethnic groups. No one—not the managers or Joe's fellow board members—ask Joe to stop. Instead, the group encourages Joe by laughing at his jokes. A little later, Joe puts his hand on the knee of one of the female employees, Kim Murakami, who happens to be Japanese-American. Joe then touches Kim's face and tells her, in front of the others, that she is "the prettiest Japanese girl I've ever seen." Kim rolls her eyes in disgust and moves away from Joe. Joe then edges closer to Kim and asks her whom she is dating. Kim ignores him. After some more swigs of his drink, Joe laughingly bellows to Kim, "I'd love to see you take off a kimono!" Kim is horrified. She stands up to leave and says to Joe, "You're not very funny. Leave me alone."

The next morning at breakfast, Joe runs into Kim. Kim tells Joe that his conduct the previ-

ous evening offended her and made her feel very uncomfortable. Joe says that he was just kidding and that she is overreacting. Kim responds that Joe was out of line. Instead of apologizing, Joe, grabbing Kim's arm, replies, "You aren't going to make a stink about this, are you? I can have your job if you do." Kim, now fearful for her job, says nothing.

Shortly thereafter, Kim seeks out the CEO of the association and complains to him about Joe's behavior the previous evening and his threat at breakfast. The CEO, who was not present at the bar, dismisses Joe's behavior as "good old boy stuff." He tries to excuse Joe's inappropriate, rude, and lewd behavior, saying that Joe was probably drunk. The CEO then says, "Just put this behind you, Kim. Besides, there is nothing I can do. Joe is a member of the board of directors."

A week later, the CEO promotes Bill Smith, a relatively new employee, to a position that Kim had been in line to receive due to her excellent work and her long tenure with the association. Kim promptly files a charge of discrimination with the Illinois Department of Human Rights and the Equal Employment Opportunity Commission. She alleges that she was (1) harassed based on her sex and her national origin, (2) the victim of retaliation for having complained about the unlawful activity, and (3) discriminated against on the basis of her sex and national origin in not receiving the promotion. There is, of course, nothing preventing the press from getting wind of the incidents and running a story about them and the association's lack of leadership.


Checklist for Boards of Directors with Respect to the Prevention and Investigation of Sexual and Other Harassment

Below is a checklist of the kinds of steps that a board of directors can undertake to prevent and investigate sexual and other harassment. Indeed, had the above-referenced association board engaged in the following pro-active steps, it is highly likely that the unfortunate incidents

described above could have been avoided.

1. A board and the executive leadership team should be varied when feasible and include men, women, diverse individuals, and individuals from different backgrounds, as well as individuals with diversity of thought and experience. There should also be independent directors on the board.
2. A board should engage in meaningful oversight by setting the proper tone for the organization's culture, by diligently ensuring that the working environment is professional, welcoming, and harassment-free, and by holding executives accountable for that environment.
3. A board must make clear to all executives and employees that the board will not tolerate sexual or other harassment or retaliation by anyone—especially executives of the organization.
4. To ensure that item # 3 is observed, a board should use employment agreements, performance reviews, and compensation (especially bonuses) as incentives and deterrents to hold executives accountable for creating a professional, harassment-free working environment and for being responsive to harassment and retaliation complaints. If executives understand that their jobs and compensation are on the line when it comes to preventing and properly addressing claims of harassment and retaliation, they will have ample motivation to inspire a professional, harassment-free working environment.
5. The board should ensure that both managers and rank-and-file employees receive significant anti-harassment training, preferably on an annual basis.
6. To lead by example, and to make sure that the board is well informed, a board should receive its own meaningful anti-harassment training, preferably on an annual basis. Moreover, the organization's bylaws should contain provisions permitting the removal of a board member who engages in harassment, discrimination, or retaliation.
7. The board should proactively review, or engage legal counsel to review, the organization's anti-harassment policy and investigative procedures to make sure that they are effective and followed. The board should make sure there is clear guidance about romantic relationships between individuals in a reporting relationship and, at the very least, require that such relationships be reported to the board or other appropriate organizational group (e.g., Human Resources or specific executives).
8. The board should make sure that the organization supplements its anti-harassment policy with separate non-discrimination, diversity and inclusion, and anti-bullying policies, as well as an EEOC statement, in its employee handbook and publicize such policies to the entire organization.
9. The board should ensure that the organization has the proper resources and tools in place to manage and keep track of complaints, performance management and reviews, promotion selection criteria, and personnel records, and to document fully and appropriately employment discussions and decisions concerning employees.
10. There should be multiple avenues for employees to address harassing and retaliatory behavior. The board should consider installing a "hotline" whereby employees have the option to register harassment and retaliation complaints directly with the board if they do not believe that management is being responsive to them or if management is causing the issue at hand.

Conclusion

Had the board of directors followed the guidelines above, it would have prevented not only the lawsuit but also, and more importantly, the unfortunate, corrosive, and unnecessary incidents themselves. The board's lack of leadership foreclosed that possibility. To prevent sexual and other harassment, it is essential that a board of directors set an appropriate tone and engage in meaningful oversight. In addition, a board must be willing to hold both executives and fellow directors responsible for unsuitable conduct. By following the suggestions outlined above, corporations, associations, and other organizations can go a long way to promoting a professional and safe working environment. 

Jon Vegosen is a founding member of the Chicago law firm, Funkhouser Vegosen Liebman & Dunn Ltd. Jon concentrates in labor and employment law. He prepared an anti-harassment policy that the Commission on Women in the Legal Profession hailed as a model for the American Bar Association. The EEOC has approved Jon as an anti-harassment trainer. He may be contacted at **(312) 701-6860** or jvegosen@fvldlaw.com.

The foregoing material is not a legal opinion and does not constitute a substitute for legal advice. Consult legal counsel concerning your specific situation or any legal questions you may have.

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Worst Case Scenario: Crisis Management Education

By Kerri Leo, MATD, CAE, CHCP

It's become an all-too-familiar sight on the evening news: people screaming, first responders carrying bodies on stretchers, and fatalities and injured counts. Mass casualty incidents—mass shootings, bombings, or other crimes with multiple fatalities—are becoming a way of life for Americans, with mass shootings being the most common form of mass casualty events. According to the Office for Victims of Crime, a division of the Department of Justice, the number of mass shootings occurring in the past ten years is 2.4 times greater than the decade prior (1998 to 2007). In fact, more than half (57 percent) of all recorded mass shootings occurred within the past 10 years. There were 11 mass shootings in 2017, more than in any other year in recorded history, with a total of 117 fatalities and 587 casualties.

This new reality has created a need for training on how to handle these crises, not just for first responders, but for the medical professionals who must treat the victims. Medical associations must now provide education for their members as part of a complete curriculum. The American Society of Anesthesiologists (ASA) has developed a unique way to address this need by hosting a mass casualty drill at its annual meeting, ANESTHESIOLOGY®, to provide its members with hands-on experience for managing a mass casualty incident. Jami Firek, education programs and live workshops specialist, and Judy Jacobson, senior education programs manager, described the planning process for staging such an event.

FORUM: Where did the idea for a mass casualty drill come from?

ASA: The National Security Strategy released by The White House on December 18, 2017 described current evidence that suggests it is not enough for a group to simply receive education and training, but that knowledge, skills, and abilities must be tested and practiced in ongoing drills and exercises, such as in Mass Casualty Workshops, to ensure true understanding of roles and responsibilities in disaster response. One of the recommendations is to improve and integrate the number of knowledgeable faculty and health care personnel in trauma care, especially in mass casualty.

There is further evidence that suggests a need to enhance the response role of the “immediate” responder and expanding/multiplying the availability of the “first” responders. “Immediate responders” are those individuals who find themselves physically located in the immediate disaster zone

and are able to assist others. “First responders” are a “broad group that encompasses a trained cohort whose arrival to the impacted site is purposed to local and initiate life-saving care and evacuation to the injured casualties.” Through universal training and education, anesthesiology physicians are well-positioned to fill the role of both “immediate” and “first” responders. For example, “a physician who happens to be at the initial site of a bombing may begin applying the improvised tourniquet and pressure dressings at the scene (in the role of an immediate responder) but later be reintegrated in a more formalized incident command structure and continue in-field treatments in a more formal first responder capacity.” There is precedent in Norway where anesthesiologists are members of the EMS (emergency medical system) team to also assume the role of MSC (medical scene commander).

FORUM: Who was involved in creating the workshop?

ASA: In addition to education department staff, we reached out to the Committee on Trauma and Emergency Preparedness for input into the development. Dr. Brenda Gentz, a previous chair of the ANESTHESIOLOGY meeting and member of the trauma committee, and Dr. Joseph McIsaac and Dr. Carin Hagberg are from the trauma committee and provided necessary input on what anesthesiologists specifically needed to learn. We also worked with CAE Healthcare on designing the experience. The combination of doctors, vendor and staff helped to create a workshop that will address current issues plaguing our country while keeping the timeline and expectations of the ANESTHESIOLOGY meeting in mind.

“This new reality has created a need for training on how to handle these crises, not just for first responders, but for the medical professionals who must treat the victims. Medical associations must now provide education for their members as part of a complete curriculum.”

FORUM: How is your workshop structured?

ASA: We've planned a four-hour workshop. We're not releasing the nature of the casualty ahead of time in order to try to keep the actual event as realistic as possible, but there will be two or three scenarios for the attendees to experience. You don't know when you head to work in the morning that there will be a catastrophic event that day, let alone what type of catastrophe it will be, so we've purposely kept the description of the workshop a little vague. The first hour is a briefing on the scenario, then the next three hours participants spend triaging standardized patients at various levels. The set-up involves pop-up walls, a roped off area where initial triage will take place, a tech room (hard walled), a debriefing area, and viewer seating. We will also have projectors that show the scenario on large screens.

There are 35 faculty, 22 standardized patients, and 8 residents that are participating as faculty and advisors for the workshop. A Standardized Patient is a person trained to take on the characteristics of a real patient, exhibiting the symptoms and characteristics unique to a diagnosis. There will be 120 attendees actively participating in the scenario and there will be seating for 100 observers. The hands-on participants will be able to claim credit for the workshop; those observing will not.

FORUM: How is this being funded?

ASA: We received in-kind support (equipment donations), and also applied for a grant to offset additional costs. Participants will pay a fee to be part of the hands-on experience which will also assist with costs.


FORUM: What has been the member response to this new addition to the annual meeting program?

ASA: It's been very positive. The Annual Meeting Oversight Committee was very enthusiastic when we first brought the idea to them for their buy-in, and our members are excited about this innovative format. The annual meeting is still three months away and the program is almost sold out. It's being offered twice in one day (morning and afternoon), and at this point we plan to offer something similar at future meetings.

FORUM: What have been some of the unexpected challenges in planning the mass casualty exercise?

ASA: This was the first time ASA planned to present a workshop of this magnitude and it required approximately 45 hours of staff time just to organize it. We worked through several months of brainstorming to determine scenarios, set-up, faculty, equipment, learning objectives, and fees. We underestimated the amount of equipment that we would need to make the workshop appear realistic, as well as the number of standardized patients. As always, when working with volunteers you need to plan ahead and stick with deadlines in order to accomplish everything that's necessary.

FORUM: What advice do you have for other organizations looking to do this at their meetings?

ASA: Research, research, research. Look at available space to make sure you have enough room to conduct a realistic scenario and plan your scenarios in advance. Once you decide what kind of trauma will take place, you can determine what equipment you'll need, how many standardized patients and what set up will be required. Seek out grant opportunities in advance of planning. The FEMA website is a great place to look for available resources to offset potential costs. This type of workshop can take between 8-10 months to plan and you need to make sure you have the experts on board to help with the project well in advance. 

Kerri Leo, MATD, CAE, CHCP is the accreditation and joint providership manager for the American Society of Anesthesiologists. She can be reached at k.leo@asahq.org.

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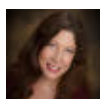
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Is a

Certification Program

Right for Your Association?



Christine Murphy Peck

By Christine Murphy Peck



Many associations have well-established, highly regarded and successful certification programs that are valued significantly by their membership and their industry or profession. But is a certification program a must-have for every association?

The deliberation process begins with a determination of need. Does the membership want a credentialing program in general? Why? Who will benefit? What type of credentialing program? Using the data gathered, the board and staff will hold in-depth strategic discussions, which include a review of the process and resources required.

At a minimum, launching a credentialing program requires establishing a body of knowledge, conducting a job-task analysis, engaging subject-matter experts for certification preparation content and developing the credentialing exam. It also requires a large time commitment from volunteers.

Despite the grueling process, associations with successful certification programs can't imagine their organization without them. It is a fundamental part of their value proposition.

"Having our credentialing program confirms our organization's relevance in the industry," says Chip Potter, executive director of the Research Chefs Association (RCA), the leading professional community for food research and development. Its members are the pioneers of the discipline of Culinology®—the blending of culinary arts and the science of food. Since it was established in 1995, RCA has developed two certification programs: The Certified Research Chef (CRC®) and the Certified Culinary Scientist (CCS®).

"Our certification programs help demonstrate that we are 'on-trend' with what's happening in food innovation," he says. "It also encourages membership growth, retention and engagement. And having two certifications that are relevant in our industry lends credibility to our members in their professions."

The tangible value that RCA's credentialing program offers members is central to the organization's ability to attract and retain members. "For our members, pursuing a credential speaks to their commitment and pays off in advancing their careers," Potter says.

It also increases their value to their employer. "The certification demonstrates these folks are talented, highly skilled professionals who've earned additional and meaningful capabilities in their specialty area, beyond their degree. It says you can trust that these individuals understand and practice the latest techniques, and they're keeping up-to-

date via the recertification process. Our member companies say having these individuals on their team makes their organization much more competitive in the market."

Christie Pruyn, executive director of the International Live Events Association (ILEA), echoes Potter's sentiments. Founded in 1987, ILEA is a global community of creative event professionals whose skills, expertise and experience power some of the most influential live events around the world. ILEA offers the Certified Special Events Professional (CSEP), which recognizes event professionals who have successfully demonstrated the knowledge, skills and ability essential to perform all components of a special event.

"CSEP helps our members set themselves apart professionally so they can take the next step in their careers," Pruyn says. "Many professionals enter into the event and meeting management space and quickly realize the wide range of expertise needed to be successful. Our credential signifies that our certificants have tenure in the industry, and a broad range of experience and competence in all aspects of the meetings management industry."

"An association governed by its peers and related to its industry is in a unique position to offer a credentialing program given that the mission is tied to the continued success of its members," Pruyn says.

When a credentialing program sets an organization apart as a leader in the industry, the long-term growth potential can far outweigh the costs, as is the case with the American Association of Cardiovascular and Pulmonary Rehabilitation (AACVPR). Established in 1985, AACVPR is a multidisciplinary professional association of health professionals who serve in the field of cardiac and pulmonary rehabilitation. The association offers two certifications: a program certification and a professional certification.

The Cardiac and Pulmonary Program Certification process is the only peer-reviewed accreditation process designed to review individual facilities for adherence to standards and guidelines developed and published by the AACVPR and other professional societies.

The Certified Cardiac Rehabilitation Profes-

“Launching a credentialing program requires establishing a body of knowledge, conducting a job-task analysis, engaging subject-matter experts for certification preparation content and developing the credentialing exam. It also requires a large time commitment from volunteers.”

sional (CCRP) provides the cardiac rehabilitation professional the opportunity to earn the only comprehensive professional certification in cardiac rehabilitation. AACVPR established their CCRP credential in 2014, and the following case study explores that journey.

How the American Association of Cardiovascular and Pulmonary Rehabilitation (AACVPR) Created a Certification Program: A Case Study

“When we started the process in 2013, professional certification for cardiac rehabilitation had already been under discussion for several years,” says Megan Cohen, AACVPR executive director. “It was spearheaded by several members of our volunteer leadership after a series of membership surveys demonstrated interest in pursuing an individual credential.”

The driving force behind choosing to establish a professional credentialing program was an issue of quality. AACVPR’s leadership believed a professional credentialing program would help elevate the treatment and care of patients undergoing cardiac and pulmonary rehabilitation.

In addition to the surveys of their members and constituents, an AACVPR volunteer task force conducted a series of focus groups of its membership, and it invited input from certification experts and organizations that had established successful credentialing programs. Plus, AACVPR’s journal had published a white paper on the profession’s core competencies, which served as the foundation for the CCRP program.

AACVPR spent 18 months developing the budget and creating the management structure for the certification. The team of volunteers and staff researched and selected a testing vendor, designed the certification management software, wrote the initial exam, prepared the study guide, developed the application protocol and prepared the candidate guide. It also identified a Certification Committee to define eligibility guidelines, policies and procedures around recertification. Finally, CCRP was ready to launch during the AACVPR Annual Meeting on Sept. 3, 2014.

“We budgeted for 175 candidates, and 208 sat for the initial exam. We were very excited by the initial launch,” Cohen says, adding that they were already considering expansion and improvements.

In 2016, AACVPR applied for and earned its accreditation with the National Commission for Certifying Agencies (NCCA), which requires organizations to meet the NCCA-standards developed by the credentialing industry for professional certification programs. One such requirement is to have 500 certificants in order to begin the application process, which AACVPR was able to meet in less than two years of initiating the program.

“Once our program was NCCA accredited, it was eligible for use by nurses in hospitals looking to earn magnet status. This has made the credential even more significant,” Cohen says.

AACVPR also wanted to expand its audience. “We continued to offer the exam in paper and pencil at our annual meetings, which was successful, but we didn’t have the reach we knew we could if we had a computer-based testing option,” Cohen says.

In 2017, AACVPR launched its first computer-based testing program. This enabled members to take the exam during a designated testing period outside of the annual meeting. The investment tripled AACVPR’s revenue.

This also gave the organization the opportunity to bring the certification to a global market. Currently, they are piloting the program in South Korea, and organizations in other countries also have expressed interest.

“Overall, the reaction from our board and members about this program has been very positive. We’ve achieved a much larger and faster uptake than we expected with roughly a third of our members attaining the CCRP designation,” Cohen says.

With the momentum it built from this program, AACVPR launched a Pulmonary Rehabilitation Certificate, in partnership with the American Association for Respiratory Care (AARC). “That has also exceed our expectations by awarding 10 times the number we had budgeted,” Cohen says.

For other associations seeking to establish a credentialing program, Cohen counsels you should

Know Your Terms

Credentialing terminology is often misused or misappropriated. Below is a quick definition list to help you understand the key components of credentialing. The source is the Institute for Credentialing Excellence.

Credentialing is an umbrella term used to refer to concepts such as professional certification, certificate programs, accreditation, licensure and regulation. Credentialing is the act of documenting achievements for individuals who demonstrate comprehensive knowledge and skills required to competently perform a job role. Typically, trade associations and professional societies create the credentialing programs for the industries they represent. Certifications, certificate programs and licensure are examples of credentialing.

Micro-credentialing is a subset of an overall credentialing program representing a narrow skill set for a larger credential. A micro-credential can represent different levels of work and engagement, including more granular, specific skills or achievements. Micro-credentials are “stackable” and can be aggregated to represent a larger area of accomplishment.

Certification is designed to test the knowledge, skills and abilities required to perform a particular job, and, upon successfully passing a certification exam, to represent a declaration of a particular individual’s professional competence. In some professions, certification is a requirement for employment or practice.

Licensure tests an individual’s competence but is a mandatory process by which the government grants time-limited permission for that licensed individual to practice his or her profession.

An assessment-based certificate program is an educational or training program that is used to teach learning objectives and assess whether those objectives were achieved by the student.

Accreditation is the process by which a credentialing or educational program is evaluated against defined standards and is awarded recognition if it is in compliance with those standards. An external third party, such as the National Commission for Certifying Agencies (NCCA), authorizes the standards for an organization to offer a credentialing program. Accreditation demonstrates credibility to the public at large that those who hold the credential achieved it through a validated process.

Digital badging is electronic representation of an accomplishment, interest or affiliation. Digital badging is visual, available online and contains metadata and links that help explain the contexts, meaning, process and result of an activity. Badge earners can display badges on social media like LinkedIn, digital résumés, job sites, and their own websites.


Putting it all together: An association’s accredited education program provides its members with credentialing opportunities through certification, licensure or certificate. Members also can receive a micro-credential as they fulfill smaller components of a larger certification. When members receive a credential, they can post an interactive digital badge on their LinkedIn profile page to showcase their achievement.

About the Source: The Institute for Credentialing Excellence, or ICE, is a professional membership association that provides education, networking, and other resources for organizations and individuals who work in and serve the credentialing industry. ICE is a leading developer of standards for both certification and certificate programs and it is both a provider of and a clearing house for information on trends in certification, test development and delivery, assessment-based certificate programs, and other information relevant to the credentialing community.

completely understand what you’re getting into. “Make sure there is agreement about why the credential is needed. Survey your members and do your homework on vendors, cost and legal issues.”

Potter and Pruyn offered similar advice.

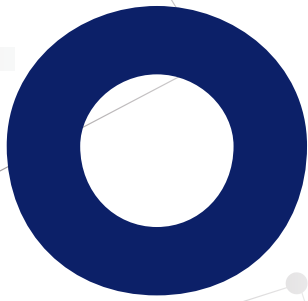
“You need a firm foundation in the industry and a keen understanding of who your members are, what their needs are, and what’s happening in the industry. You also need consensus that you’re doing the right thing and that a certification is aligned with your organization’s objectives and strategies,” Potter says.

“Start a credentialing program when your organization is established, stable and has enough members, clout and representation in the industry to support it,” Pruyn says. 

Christine Murphy Peck is senior director of Education & Learning Services at the association management and services company SmithBucklin. For more than 25 years, she has worked with numerous associations to establish and enhance their credentialing programs. She is a DDI-certified facilitator and certified to administer the Myers-Briggs Type Indicator®. You can reach her at cpeck@smithbucklin.com

What Associations Need to Know About GDPR

By **Brian K. Willard, CAE, MBA**



On May 25, 2018, the most significant data protection regulation “law” to date went into effect. How associations handle this new regulation will be complicated and changing as we move into this new era. The EU-GDPR (European Union—General Data Protection Regulation) is just the first to go into effect, and if your organization thinks it is immune as you have no EU members or customers, think again. California just passed the CCPA (The California Consumer Privacy Act of 2018 also known as “AB-375”) which brings some of the EU protections to California residents on January 1, 2020. I am going to concentrate on EU-GDPR, but it is important to know that another legislation in a U.S. state is going into effect in less than 16 months.

First, the obligatory disclaimer: I am not a lawyer, nor do I play one on TV. None of this should be taken as legal advice. Please consult your legal counsel before implementing any policies or procedures. I do not have the room in this article to cover everything in GDPR under all circumstances, so understand that I will be simplifying and generalizing a very complex and at best, vague regulation that is not based on our legal system. This is a very high-level overview as I could take the entire magazine to document and explain the complexities of this 88-page legislation.

The GDPR governs both Processors and Controllers of Personal Data also known as PII (Personally Identifiable Information). Under most circumstances, associations are Controllers but may also be a Processor. PII is any information relating to an individual. It can be anything from a name, an address, a photo, an email address, posts on social networking websites, a computer’s IP address, to name a few. There is also a Special Category of data that has a higher requirement of permission. These include such things as race/ethnicity, religious or philosophical beliefs, political opinions, trade union memberships, biometric data, health data, sexual preferences, sex life, and/or sexual orientation. Associations sometimes ask those types of information on membership forms, sponsorship applications, registration forms, and other types of data collection.

The simplest test to see if you fall under the EU-GDPR is to determine if you have any records from individuals in ANY of your databases that

are EU residents. This includes your membership, event registration, donations, product purchases, analytics, etc. If there are any with a country in the EU, then GDPR applies to your organization.

The countries that the EU-GDPR currently applies to are: Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and the United Kingdom. It doesn’t matter if you are headquartered in one of those countries, have an office there, hold events there, or even travel there. If you hold data in any of your systems from EU residents, you are liable under the GDPR for those records, even if that data was collected in the past.

If you don’t have, and don’t expect to have any data from EU residents, you probably don’t have to worry about GDPR; you can most likely bypass everything about GDPR which is now in effect.

If you have EU records, one of the most important things to realize is that GDPR is NOT an IT issue, it is an organizational Risk Management issue. Your organization’s senior management is ultimately responsible for approving policy, procedures, and priorities. Based on the very substantial fines that can be assessed under GDPR, it could be financially devastating to most associations. Assessing the chance of being fined is also important and may change the approach your organization uses to address GDPR.

The EU made sure there are penalties for organizations that do not comply, even very large organizations. These fines are substantial, and they are one of the reasons that so many organizations have taken GDPR so seriously. The maximum per-individual fines are listed as €20,000,000 (currently around \$23,000,000 USD) or 4% yearly turnover (European term for “gross income”), whichever is greater.

That is why some companies, such as the Los Angeles Times and Chicago Tribune shutdown all online access to anyone in the EU since the day that GDPR went into effect. This is a potential strategy for an association with very small or non-existent GDPR members, customers, registrants, etc., as complying can be complicated and expensive. However, with CCPA already on

the books and other countries working on similar legislation, avoidance will become increasingly difficult.

Complying with GDPR offers multiple options on gaining permission to store, process, or otherwise use PII. Most associations can use the “Legitimate Interest” for internal use of PII provided by members and customers. But anytime that information leaves the organization for things such as list sales/rentals or providing attendee lists to exhibitors as examples, you will most likely need a higher level of permission. You will need explicit permission such as an opt-in that is not pre-selected, to share that information outside of your organization. Informed consent must be specific, unambiguous, plainly-worded, and cannot be bundled together. There also must be a way to revoke permission easily at

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The full text of the regulation is at: <https://bit.ly/2NXEzk1>

To help you navigate within the regulations articles, use this cheat sheet to quickly locate topics:

Topic	Article #
Definitions	4
Territorial scope	3
Lawfulness	6
Consent	7
Children	8
Special Categories	9
Transparency	12
Information to provide (direct)	13
Information to provide (not directly obtained)	14
Right of access	15
Right to erasure (Forget)	17
Right to restrict	18
Right to Object to data processing	21
Automated decision making (Profiling)	22
Responsibility of Controller	24
Processor	28
Maintain a record of processing	30
Security of processing	32
Notification of data breach	33 & 34
Data protection impact assessment	35
Data protection officer	37 - 39
Codes of conduct	40 & 41
Certification	42 & 43
Transfer of data	44 – 46 49 & 50
Binding corporate rules	47
Remedies	77 - 82
Fines	83 & 84

any time in the future by the individual. Unfortunately, financial gain does not sound like it will pass the “Legitimate Interest” test.

There are several articles within GDPR that cover more protections for individuals’ PII and what we as organizations can do with it. For example, it provides to individuals the right to request their data be erased (or at a minimum, anonymized), the right to access the data and portability (the right to have their data sent to them in a usable format in a timely manner), the right to restrict processing, and the right to not be profiled.

There is also a higher age requirement of parental consent for minors than in the US. Just to make it more complicated, though GDPR stipulates a base line of 16 years of age, each country in the EU can adjust that age threshold.

There are also three articles within GDPR on a required position, Data Protection Officer, in all organizations. There are mixed recommendations on if a US-only based organizations need to appoint this position and what it looks like. Naming an existing position in senior management is a common practice and should be considered.


Another major GDPR article requires that anytime a data breach (unauthorized access to data) is detected, compromised organizations have 72 hours to notify EU residents if PII of significance is leaked for any reason.

For further explanations and details of the regulation online, I highly recommend the official EU website: https://ec.europa.eu/commission/priorities/justice-and-fundamental-rights/data-protection/2018-reform-eu-data-protection-rules_en.

Associations need to fully assess the new regulation and how it affects their current data collection, storage, and dissemination of data. As legislation continues to evolve and more governments follow the EU’s footsteps, which California just did, associations will have to find ways to be good stewards of the data we possess.

As this regulation is new and has no case-law yet, it is hard to see how this regulation will be interpreted and enforced by the European courts. As each EU country has the responsibility for enforcing the regulation, we may have some that are very strict and others that are more forgiving. Another large unknown is if a judgment is made against

an organization that is based solely in the US for example, will the EU Data Processing authorities in a member state be able to collect the fines from a non-EU country?

The GDPR should be looked at as a great opportunity to assess our data in and outflows, data retention policies, and data security. Consider working with an attorney who specializes in GDPR or with a GDPR consultant to navigate the requirements for your specific cases. It is our responsibility as association professionals to protect and respect the privacy of our members, prospects, and customers. 

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The Impact of Digital Transformation: It's Still a Thing

By **Heidi Weber, MBA, CAE**

With contributions from **Marc Bernstein, CAE,**
Dean Comber, MBA, PMP, CSM and **Dave Laatz**

Still getting over your association's digital transformation hangover from the past 5-10 years? As much as associations may think that the digital transformation era is almost over, it's still a thing. No matter what type or size of the association, digital transformation still demands attention, logical analysis, resources, and cultural adoption. 2018 is showing associations that AI, privacy concerns, especially GDPR, and cybersecurity are taking front seats in the digital transformation conversation.

What is Digital Transformation?

Digital transformation is the use of technology and innovation to renovate an organization's activities, business processes, and methods of operation to achieve a strategic advantage. It is a purposeful process to leverage technical competencies into future directives. Digital transformation may change an organization's culture, structure, operations, technology, and even people's roles to enable a business to leverage opportunities in a rapidly changing market due to the pace of technological innovation.

Why Does It Matter?

Associations have missions that mandate that members be served in the best capacity possible, which includes providing a quality experience with an association's products, programs, and services. Technology drives the delivery.

FORUM has gathered insights from four association professionals about how they embraced digital transformation in their respective association space. If digital transformation is still relevant for them, is it for other organizations?



Marc Bernstein, CAE
Director of Information Technology
American Society of Anesthesiologists

Marc Bernstein, CAE, is the director of information technology at the American Society of Anesthesiologists (ASA) and is currently serving on the ASAE Technology Council. Marc has spent the last 15 years in association technology leadership, also at the Institute of Food Technologists and Personify. You can contact Marc at M.Bernstein@asahq.org.

Digital Transformation was So 2015, Why is It Still Important?

Take heart if you believe that your organization has not advanced as far as you would like in its digital transformation narrative. There are significant barriers that have slowed the pace of digital transformation for many organizations. For example, addressing cybersecurity as one relies more on digital platforms has siphoned resources to protect systems and data. Legacy CMS, CRM, AMS, or LMS systems may require upgrading or replacement to gain the capabilities needed to provide personalized experiences for members or to easily integrate with the large numbers of third-party systems an association needs to manage.

Many associations have also been slower than the private sector to develop foundational data governance processes, human resources, and analytic reporting systems required to support and leverage a digitally oriented business. Lastly, data privacy concerns that manifest themselves as regulatory mandates like GDPR, PCI DSS, HIPPA, and CAN-SPAM have and will continue to affect the pace of digital transformation, ensuring that the privacy rights of individuals are addressed as digital services are delivered.

It can take a long time for organizations to implement meaningful change and the projects to drive change are often still underway long after the media buzz has moved on to the next big thing. Take PCI compliance. Companies are again making progress to more secure payment systems almost 15 years after the first regulations were introduced. I recently spoke with someone who works in cybersecurity for a major telecom company who said they still have significant holes in their PCI compliance strategy. Similarly, while GDPR is in the news today, it will also take years to understand the implications of the law, when and where it will be enforced, and how each of our technology business partners will choose to address it.

How to Transform an Organization

Build a digital culture. It is hard to change workplace culture to think digitally if you are not supporting your staff with digital tools. Ensure that your workforce has available technology tools to be comfortable, engaged, and productive when working remotely, or collaborating from a branch office. That means video conferencing tools, collaboration tools, BYOD support, cloud-based productivity, and document management applications, and self-help portals.

Focus on member experience through journey mapping, good UX (user experience) design, and incorporating member feedback into your design decisions. Use analytic data to identify the essential content and focus on those areas. Become agile in project and development approaches. Leverage proof of concept, minimum viable product and other techniques to develop innovative ideas and get them in front of members as quickly as possible to get feedback and deliver value sooner.

Have a strategy to interact with members across multiple digital channels (web, social, email, text, chat) and prioritize channels based on your audience. Create a strategy around data so that the creation of personalized user experiences provide content relevant to the user and that also predicts member behavior. To create such a plan, many questions need to be answered, such as: What data is required? How can the information be captured? How accurate must it be?

It is not too late!

Just because the buzz about digital strategy has quieted, do not be fooled into thinking that the curve has passed. Progress may have been made, but it is not too late to create a stronger strategic plan for digital transformation.

**Dean Comber, MBA, PMP, CSM**

*Chief Financial and Information Officer
American Association of Nurse Anesthetists*

Dean Comber is the chief finance and information officer at the American Association of Nurse Anesthetists (AANA). He has successfully led several substantial system conversion, continuous improvement and digital strategy projects. He holds a Master of Business Administration, Information Systems, Finance from Northern Illinois University and a Bachelor of Business Administration from the University of North Dakota. You can contact Dean at dcomber@aana.com.

When I look back upon the last ten to fifteen years as to how digital transformation has impacted association management, I think one thing is undeniable: transformation is not merely a conglomerate of buzzwords, but something that is an evolutionary, continual, and cultural journey that impacts every underpinning of an association. Digital transformation is not something that starts and ends. Beginning the process is almost like a catharsis for an association.

There are technology initiatives that complement what digital transformation is supposed to accomplish, but I feel that it is also inclusive as to how the association becomes agile and proactive versus reactive in providing constituents the ability to get what they need. When it works well, it is done seamlessly, while also extenuating the value proposition of why being a member is vastly important.

Moving to a Quicker Pace

There is a common belief that associations move at a slower pace than private sector organizations. In many ways, historically, I think that was an accurate statement. I have witnessed all things digital become a continued priority for both strategic and operational planning for associations. C-Suite roles such as Chief Digital

Officer, Chief Data Officer, Chief Information Security Officer that are prevalent in the private sector, are now finding footing as priority roles in the association management industry. Associations are pursuing initiatives and vendor solutions in the arena of predictive analytics, AI, and cybersecurity in our industry, which is comparable to many current actions that the private sector is striving to address.

Competition for consumer attention is continually growing and focused primarily in the digital landscape. Members and constituents are continuously being inundated with information that competes with organizational products and services. To remain relevant, associations will have to continue to establish digital transformation as a priority.

An association cannot be successful in advocacy, continuing education, member engagement, publishing, or other initiatives without having the proper, structured digital platforms, mindset, and appropriate project management methodology. In having a technology department focused on continually leading digital transformation, associations can continue to promulgate their products and services in the always changing digital society where we now encounter our constituents.

“Transformation is not merely a conglomerate of buzzwords, but something that is an evolutionary, continual, and cultural journey that impacts every underpinning of an association. Digital transformation is not something that starts and ends. Beginning the process is almost like a catharsis for an association.”



Dave Laatz
Partner and Owner
Information Systems
Consulting Group

Because of the pervasive nature of technology, many of the changes that your organization needs to undertake to remain relevant and competitive will likely have a digital footprint. It should not be assumed that leading a digital transformation effort is to be managed solely by your organization's IT resources. Gaining consensus by involving key staff and forming a cross-functional team to help lead the digital transformation process is a key for success.

The Digital Transformation Process

The first step that you and your team need to take to define the scope of your organization's digital transformation needs is to perform a thorough technology and business process assessment. The focus of the evaluation should help establish how well your current technology solution and associated business processes support your organization's strategic plan. The initial evaluation should be broken down into three phases: Discovery, Findings (including a gap analysis between your current and desired state), and Recommendations for improvements.

The Discovery Phase

During the discovery phase of your assessment, information should be gathered as to needed technology and process changes through the eyes of both constituents and staff. This can be performed via formal constituent surveys and staff questionnaires that will help you ascertain what these distinct groups feel are the strengths and weaknesses of your current business processes and technology solutions such as your website, AMS, LMS, mobile capabilities, and other digital assets. The surveys and questionnaires should also solicit ideas about the value impact various improvements would bring to customer service, staff productivity, and your organization's marketing and revenue generating capabilities.

Findings Phase

The next step should involve an analysis of the information gathered during discovery. The assessment of the weaknesses expressed by both constituents and staff will help you identify opportunities for digital transformation. Once these areas for change have been identified, you can create a digital transformation portfolio containing all your change recommendations.

After your change portfolio has been completed, you should review all the potential changes with your team. Each change should be analyzed regarding benefits, cost, risks and implementation resources required. Whenever applicable, each shift should also be aligned to a specific item that it will support from your organization's strategic plan.

Recommendations Phase

After all your digital transformation changes have been documented, they should then be prioritized. This will allow you to group your prioritizations thereby creating an action plan and roadmap that will guide your transformation efforts to your desired digital state.

When an organization undergoes a digital transformation process, it begins the process of experimentation and innovation. Progressive organizations should often be making digital changes to help realize and support their business strategies. To succeed requires taking calculated risks, finding new ideas and continuously innovating with the systems and process used to communicate and transact business with constituents.

Dave Laatz is a founding partner of Information Systems Consulting Group. Dave is an experienced executive level manager with proven skills in helping organizations maximize the delivery of business value through IT-driven business process change. Dave has more than 30 years' experience working with associations on the application and implementation of technology systems. You can contact Dave at dlaatz@iscgi.com.

**Heidi Weber, MBA, CAE***Executive Director*

Alpha Omega International Dental Fraternity

Heidi Weber, MBA, CAE, is the leader and facilitator of the Alpha Omega International Dental Fraternity (AO) located in Rockville, Maryland. As the executive director, she has been a change agent and has championed mission-driven programs to benefit the healthcare community. With more than 15 years of experience in nonprofit and corporate organizations, Heidi has provided leadership and strategic management to both professional and trade societies and their members and boards. She is a member of the ASAE Technology Council. You can contact Heidi at hweber@ao.org.

A Small Staff Association Executive Who Loves Technology

When I became executive director of a 5,000-member international dental society, I immediately embraced technology not only as a necessity but also a luxury. I championed the importance of technology in the organizational culture, from the board of directors, members, and the staff. It is not necessary to love technology, but it is critical to consistently scan what the organization needs, what it can afford, and how to move forward the best way possible.

I have learned that it is difficult for a small association to embrace every technological advancement that comes along, but there are victories when technology works to benefit the mission and members. My love of technology drives me to expand my knowledge to help my organization.

A Database Crash to Launch a Digital Transformation

Technology, especially for a small association, can be a luxury, especially when faced with unintended expenses. In my first year as executive director, I weathered an AMS (association management system) crash where the licensed partner was not backing up years of membership and event data. Talk about a disruptor!

The crash occurred a month before the new dues season was scheduled to start. The rebuilding phase significantly affected the finances, which impacted other expenditures. This unfortunate occurrence was my digital transformation to make sure that the organization's data was protected and to find a trusted AMS partner. I became a quiet evangelist to encourage colleagues to take active roles in their organization's technology transformations.

Take the Lead and Get Educated

Three years ago, I acquired a new AMS for my organization. A pro tip for small associations looking for a new AMS – hire a consultant. In hindsight, I wish that I had known that there are specific consultants versed in all things AMS who provide assessments, selections, contract negotiations, and integration oversight. Although many small associations do not have the resources or opportunities to take this route, I highly recommend it.

As a continual learner, I attend conferences that focus on technology and network with colleagues. I participated in the recent AMS Fest in Chicago to learn about other AMS options and what it would take to move into a new one. The lectures were engaging and focused on the challenges and opportunities that the AMS platforms offer. The implications of cultural adoption were discussed. If the staff and the stakeholders cannot adopt an AMS, the cultural shift will not benefit the organization.

Association professionals can formulate their educational blueprint by attending technology conferences and lectures hosted by Association Forum, ASAE, or other sources. Association chat boards have been sharing some terrific questions about digital transformation.

A Budget for the Digital Transformation

For any sized association, especially a small one, the cost of technology can harbor anxious feelings about what to anticipate and what may be afforded. My organization does not have the resources for full-time technology staff, so I have engaged vendors to fill in the gaps.

Explaining these necessities to a board of directors can be difficult because they may work in an industry with different technology

“Small associations have everyday challenges concerning limited resources and staff. It is possible, with time, resources, and a budget, to take the lead and move the organization’s digital transformation forward.”

needs. I am currently working with a vendor who is creating an API to exchange data between our website and AMS. Several board members requested this, so part of my job is to analyze and present the costs and then execute the request. I am a firm believer in ensuring that an operational budget includes a healthy amount for technology needs. Having regular discussions with the board is crucial to allow technology to make an impact. Again, small victories are reachable if they are funded and supported.

Digital Transformation Does Not have to Be Magical

I had the preconceived notion that digital transformation magically alters an organization. After two new websites in seven years, plus the AMS crash, plus onboarding a new AMS three years ago, I realized that nothing is magical. It takes determination, discipline, resources, and patience to usher through a digital transformation in whatever form an organization needs. It can be magical after a new website launches, or the staff finally adapts to the AMS. However, the process requires a firm grasp of the reality.


Succession Planning and Digital Transformation

A hot topic on the association message boards is executive succession planning. This concept is when an executive retires (which is occurring at a significant pace in the association space), leaves for another job or quits, the board of directors already has a blueprint of potential next steps. A secondary plan can include instructions from the outgoing executive to the incoming one.

Any executive creating a succession plan needs to prioritize the costs of a future digital transformation. Speak to the staff about what they may need to create a deliberate intention of technological resources. Is the server dying and a new one will be required? Is the organization ready to migrate to the cloud? Will the website design need to be refreshed? The future imprint can be significant.

Small associations have everyday challenges concerning limited resources and staff. It is possible, with time, resources, and a budget, to take the lead and move the organization’s digital transformation forward.

Conclusion

Digital transformation takes many forms and modalities, but one thing is clear: Associations must embrace the process, continued analysis, an opportunity to shape the future. Making digital transformation an integral part of the culture can shift an organization from being reactive with technological shifts to being proactive. These association professionals think that digital transformation is essential, and hopefully, it’s still a thing for your organization. 

Heidi Weber, MBA, CAE is the leader and facilitator of the Alpha Omega International Dental Fraternity. She can be reached at hweber@ao.org.

Looking for Immediate Feedback and Higher Response Rates?

Try Research Panels

By Mike Norbut


Steve Horne, MBA

*Senior Manager,
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Steve Horne, MBA, joined the American Dental Association in 2008 as part of a brand-new marketing team. His role is to lead marketing research activities for the association. Most recently, Steve spearheaded the creation of an online research panel comprised of ADA member dentists. Steve has an MBA from the University of Utah, with an emphasis on operations research. His undergraduate work was at Utah State University in Business Finance.





n today's era of instant feedback, associations have tried a variety of methods to gather intelligence about their members and professional communities. From website polls to posing questions on social media, associations have found opportunities to “take the pulse” of members on single topics or top-of-mind issues. However, how useful is that data? Is it statistically valid or truly representative of the organization's demographics? While comprehensive research, such as a member needs or satisfaction survey, is always a preferred method of collecting feedback from a representative sample of participants, it's not always practical or economical to embark on such an effort every time a new topic of interest arises.

So where is the middle ground between single-question polls and comprehensive research? One solution is to create research panels, which can be developed with an eye toward member diversity but segmented when necessary to probe issues with certain key audiences. One association that has successfully added research panels to its marketing strategy is the American Dental Association, which turns to its members for insight on a regular basis. The panels launched in 2017, and have not only seen steady growth, but remarkable engagement from participants as well. The first project netted a 70 percent response rate, and the lowest response rate for any panel survey deployed to date has been 40 percent—enviable statistics by any market research standards.

FORUM sat down with Steven Horne, MBA, senior manager, research insight for the ADA to discuss the association's panel strategy and lessons learned to date.

FORUM: Describe your research panels. How many members are involved? How frequently do you seek their feedback?

We have two research panels. The Advisory Circle is comprised of ADA member dentists who have volunteered to participate in short, periodic research studies. Panelists represent a

broad cross-section of active practicing member dentists in terms of age, gender, ethnicity, geographic location and dental specialty. We currently have nearly 1,300 members in this panel. We reach out to these members with a new research project about every three weeks. Most of my emphasis is on this panel.

The second panel is called the ADA Clinical Evaluators (ACE). It is a revival of an earlier panel that had gone inactive. This panel has about 650 member dentists. Research topics for this panel are more scientific and clinical in nature. Studies are far less frequent, averaging about one every three months. Response rates run about 40%.

FORUM: What factors led to your decision to try to pursue this panel strategy?

The main factor was a steady decline in response rates from our member dentists. We have a policy to send a general member survey no more frequently than once per quarter. When response rates started dipping below 5%, that meant we had to send surveys to more than 15,000 dentists per study. With about 80,000 individuals in the pool, it meant we could only deploy three or four studies per quarter. I began searching for other means to gather member research on a more reliable and sustainable basis.



“Don’t ask things we already know, or cover topics that have been beaten to death. Demonstrate how the information they contribute is being utilized. Respond to each and every question from a panelist in a timely manner. Share as much as you possibly can. Be transparent.”

Another factor in establishing a research panel was to create a feedback loop that we could tap into on a more spontaneous basis. Our previous studies had to be planned weeks or months in advance. Now, if our Executive Director calls me to ask how members feel about topic X, I can deploy a quick single-question poll and have an answer in a day or two. That kind of immediacy is priceless.

FORUM: What has been the reaction among members to the panel concept so far?

I am happy to report that our panel members are staying engaged. Only about 10 individuals have dropped out so far. We are very pleased that number is so small. Part of our preparation up front was to establish a strategy to attract, engage and retain members on the panel. Our onboarding survey asked them directly how they would like to be compensated for participation, and what research topics would most interest them. Their top response for compensation was to simply be kept abreast of the research results. To that end, I program each survey to provide a simple report with live survey results to be displayed immediately when they click the final submit button at the end of the survey. Panelists really like this. I also share links to previous completed research reports in the invitation to the next study. When the panel was initially launched, we also had the participants choose their own panel name. Advisory Circle was the name they selected.

While we noted the preference among panelists to receive research results, we also send out periodic tokens of appreciation about every six months. The first was a small ADA-branded desktop trinket. The second was more substantial: an award-winning publication that helps dentists explain conditions and treatment plans with their patients. Our next item will be a consumer electronics gift.

FORUM: How do you decide when (and whom) to ask for feedback?

Part of the strategic preparation for the panel design was to get stakeholders from other divisions of the ADA involved and to make sure the panel would be available to multiple areas throughout the ADA. We accomplished this by creating an Advisory Circle work group to oversee the research projects. We convene once every six weeks to discuss the most recent projects, what is in the field presently, and to determine prioritization for the upcoming projects.

The Advisory Circle is large enough now to target specific sub-groups. For example, we have already tapped female dentists for a unique study. Another key segment is new/young dentists. We oversampled this key group in recruiting so we can interact with them more frequently for smaller sub-studies. We also use the Advisory Circle to source participants for small qualitative studies (focus groups, telephone calls, online bulletin boards, etc.).

FORUM: Is there a “critical mass” of participants that you’re seeking to make your research panel survey successful?

After about six months of preparation, the panels launched in the first quarter of 2017. Initial recruiting landed about 700 panelists. Subsequent recruiting waves have grown the panels to about 1,800 members today.

I originally thought we would need 4,000 members on the Advisory Circle. Now, given the higher response rates that we are consistently seeing, I’ve cut that target in half. Once we have 2,000 or more members on the panel, we will be able to conduct multiple studies concurrently. And we will be able to drill into even smaller segments of the panel (certain age groups, specialists, etc.)

Ultimately, we are considering starting up a panel of nonmember dentists. And we’d like to have a consumer/patient panel as well. All in good time.

FORUM: For other associations that may want to pursue a similar strategy, what advice can you share? Are there any best practices that you have developed or potential pitfalls that you have identified?

I researched best practices for up to a year before we embarked on the project. We did a rather extensive software search to find the right tool to manage our panels; I also sought out a consultant with specific expertise in panel management for non-profit organizations. I continue to consult with her periodically on both technical and procedural/practical matters.

It is critical to get management support. They need to fully understand the concept in order to fund the software, incentives and consulting. I made a formal presentation to our steering


committee (made up mostly of volunteer leaders) and successfully secured funding from our discretionary business development budget.

Another aspect that contributed to the success is keeping the other divisions on board via the work group meetings.

There is an optimal interaction frequency with panel members. Too many studies will drive them to quit. Too few studies will lead them to forget about the panel. The happy medium for us seems to be one to two studies per month. To help them stay engaged, I employ the following tactics:

- Select research topics that interest them (which we asked about in the onboarding survey).
- Keep the surveys short and easy to answer (typically eight to 12 questions).
- Don’t ask matrix-style questions (they don’t work well on mobile devices).
- Keep open-ended questions to a minimum (one or two per survey).
- Send incentive items periodically (about every six months).
- Craft the survey invitations to be direct and personal, and sometimes include links to reports from previous studies.

Potential pitfalls? Stay relevant. Don’t ask things we already know, or cover topics that have been beaten to death. Demonstrate how the information they contribute is being utilized. Respond to each and every question from a panelist in a timely manner. Share as much as you possibly can. Be transparent.

Overall, this project has been highly successful for us. I’m conducting twice as many research studies per year as I could before the panel creation. We can be more flexible with timing and even handle emergency research requests when needed. And our rank and file members are no longer being asked to participate as frequently, which has actually increased the response rate on general surveys. 

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What does Member Engagement Really Mean?



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Executive Director
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Dentistry



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Society for Vascular
Surgery

By **Candice Warltier**



With all the discussion about member engagement, it becomes challenging for associations to define and measure what it really means. Different associations may have varied definitions of member engagement depending on their overall model and the specific needs of their members. For many organizations, the answer comes down to being realistic about what they can expect from members.

Associations of all shapes and sizes face a similar challenge: remaining relevant by connecting and engaging with members. FORUM spoke with four association leaders about how they define engagement, and what they've done to improve those connections at their organizations.

FORUM: How do you define member engagement?

Cotroneo: Engagement is actually an “umbrella” which covers the myriad products, services and support mechanisms organizations develop to customize the individual member experience. The usual activities (education, advocacy, research and data about the given profession, etc.) tend to draw people in. Engagement brings them closer and may play a role in retaining them. Forums, online communities, just in time learning, recognition, etc., are all ways in which we create connectivity. The member then self-selects the level he or she wishes to stay connected. I think that is a sliding scale, dependent upon what the person has going on at any given time.

Leighton: Member engagement is how members interact with us—qualitatively and quantitatively—and how those interactions impact their perceived value of membership.

Moses: As someone who has worked for several membership organizations over the past four decades, I have seen varying degrees of member engagement. Given that technology growth has exponentially expanded the means by which members have the ability to engage, I tend to take a broader view of member engagement. Generational differences have tended to change someone's motivation behind joining an association.

Today, for-profit entities offering most of the same products, services and benefits as associations traditionally provide. The barriers to entry are low and these for-profit entities tend to be faster, cheaper, better in providing many of the services the marketplace had traditionally turned to associations for in the past. In fact, I would argue that “member en-

gagement” may not even be the correct term to use. With the advent of the “freemium” model in both the for-profit world and the association universe, I would suggest that “marketplace engagement” better describes what we have traditionally thought of as “member engagement.”

Members and increasingly, non-members, are more aggressive in trying to have a voice on some level on the issues, decisions, planned activities, events, products, services, delivery channels, and ultimately impact the overall growth and development of an organization. I think every organization should have a member engagement strategy that takes into account “marketplace engagement” as well as “member engagement.”

Slaw: Member engagement is a global measure of how active, involved, and committed a member is in the work of their organization. It is a reflection of their “presence” or “footprint” in the organization at a given moment in time or career phase. It is very important to view engagement as tiered, and dynamic, not all or none, and static. Members often increase or decrease their level of engagement based on what is going on in their lives or careers, and if they have a specific issue or need they are passionate about addressing. In the big picture, you want every member to see their society as a relevant and important asset to their advancement. As society execs we know the more members are engaged the more return on value they will receive. How many times have you heard a member say “I got back 10 times what I have contributed.”

FORUM: What is the profile of an engaged member?

Cotroneo: I'm sure there is a defined profile for every organization type, however I think it is a mistake to stereotype the profile...for instance, “if you only open emails you're not that engaged.” This may be all that individual needs to support the premise of ongoing membership. So, for some it's all in—volunteering, attending conferences or purchasing virtual

“Member engagement is a global measure of how active, involved, and committed a member is in the work of their organization. It is a reflection of their “presence” or “footprint” in the organization at a given moment in time or career phase.”

learning—for others it is an “arm’s length” connectivity. I believe an engaged member is someone who can define the value of being a member for them, and we don’t necessarily get to decide what that is.

Leighton: In our member survey earlier this year, we measured baseline Net Promoter Score and Member Satisfaction Scores and will now reassess in future years to monitor those Key Performance Indicators for member engagement. Our member survey consultants identified an “engagement ladder” specific to our organization that identified detailed interactions as likely to lead other forms of participation with the Society. We will leverage that information to increase the ways members engage with us.

Moses: At the risk of being an outlier, I believe that an engaged member is anyone who even thinks of the association. Granted it is impossible to track whether someone is thinking about your association (at least today), I see engagement as a continuum. There are levels of engagement ranging from just being aware of the association’s existence to being a thought-leader, politically involved, long time “active” (maybe even PITA member) who helps set the group’s direction. At each stage of the continuum, those who engage with the organization hopefully get something from the organization and in turn provides the organization with at least a bit of data that helps inform the organization in some fashion. Ultimately the goal is to achieve conversion. I will admit I favor revenue generation from that conversion. However, conversion can include becoming a buyer of a product or service, joining as a dues paying member, or even through becoming a strong influencer on behalf of the organization and it’s positions, whether a member or not. So, I suppose my profile of an engaged “member” is one who either generates revenue or positive goodwill for the organization.

Slaw: There is no common profile. Each member has a personalized profile and that is exactly the point! The profile of a member is tiered and situational. Engagement often begins on a transactional level (a phone call, an order) and leads

to other opportunities and possibilities (an article, a survey response, a volunteer position), leadership development, and eventually leadership. Engagement changes as members learn how best to derive and optimize value from the organization. The cool thing today is that a member can be a thought leader from anywhere, even at a transactional level, and they can personalize their experience. The more value members receive the further they engage, the more relevant the society is to their career and lives.

FORUM: What are the top three challenges you have when engaging members?

Cotroneo:

1. Time: our members are physicians and medical administrators. Patient care and related services will always supersede what we have to offer.
2. Cost: more and more, people must justify the cost-benefit ratio. If what is offered seems less valuable than the amount it costs, engagement is diminished, and people walk away.
3. Competition: what does the organization offer that is different, more accessible, less costly, etc., than the competitor purporting to provide the same things for less.

Leighton: We are fortunate to have a 97% membership retention rate, but we want to better meet members where they are with programs and services that address their professional needs. We plan to create better member segmentation to target communications to members by career stage, practice settings, and self-identified priority areas. We also want to focus on member value – in particular, identifying ways to continue making Society membership relevant. With a growing international presence, as well as a new allied health membership category, we are also exploring additional ways to facilitate member engagement that factors in their unique needs.

Moses:

1. Making sure that we are diversifying opportunities and member benefits based on the needs, demographics and level of experiences of our marketplace.
2. With technology advancing so rapidly, we often find it challenging to be progressive in our efforts of communicating with the marketplace. We are always seeking out new and innovative ways to market and communicate to our existing and prospective members and those who can help us move our mission forward.
3. Competition from for profit entities who cherry pick the low hanging fruit that has traditionally been “ours” while leaving the difficult and non-revenue producing activities (e.g., advocacy) to us is a significant challenge.

Slaw: I think the 3 biggest challenges are:

1. Attention and Time-Getting the attention of members and having them find the time to explore opportunities is a real challenge
2. Creating Opportunities-Having the creativity and flexibility to match opportunities to each member’s need is critical
3. Technology investment- An engagement technology platform is essential to optimize engagement and learn from it, but it is a big investment and may not demonstrate ROI for several years. This requires vision and smart design to ensure energy and effort is not wasted.


FORUM: Please share one example of how you have increased engagement with your members, either in person or virtually.

Cotroneo: Our Member Services Team started offering professional head shots in the organization’s booth at our annual spring conference. We thought it would be a nice thing that a few people would access because “everyone does it.” Turns out, members were extremely grateful for the opportunity to focus on themselves as professionals, found the service to be extremely valuable (we did it for free), and allowed them to update their professional profiles so they are positioned on social media, and with executive search. They told their friends...who told some of their friends; a small thing which produced a big win for the organization.

Leighton: Based on results from the membership survey, as well as committee recommendations, we are currently beta testing an online community through Higher Logic. This will allow us to improve engagement by providing networking and

collaboration opportunities 24/7, which accommodates our international members, as well as the hectic schedules of our doctors.

Moses: At a previous organization, we had a strategic goal to increase the consumer awareness of our members as the preferred source of certain dental services. We created a program to empower members to get the word out to their local prospect base while the association conducted a broad, national campaign. Our expectation was that we would have about 100 participants (out of about a pool of 3,600) and that included about 50 of the top elected leaders. Much to our surprise, we ended up with over 500 members participating—most of whom were members who had never been engaged in the traditional sense. They had not sought a certification within the association. Most never had responded to a survey. Virtually none were the top 50 leaders, and surprisingly a significant number had not regularly even opened our emails much less clicked on a link. Although I would like to say that this was the result of significant market research (there was some), and a well thought out plan, in reality, it was probably more just dumb luck having stumbled into addressing what was a need or a want that resonated with a large number of members.

Slaw: I think one of the best most recent examples is the formation and flourishing of a new Section for Vascular Physician Assistants. A single member approached SVS with the interest of connecting with other PAs that work in vascular health. SVS worked with this member to find 5-6 colleagues to connect with and brainstorm ideas. They proposed forming a new Section within SVS, and now their community has close to 150 vascular PAs presenting education and opportunities to network, connect and engage. 

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October 2018

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AMC SIG: How to Develop and Strengthen a Scarce Resource: Your Board Leadership Relationships
9 – 10:30 a.m.

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Public Policy & Advocacy SIG: Building Engagement Through Effective Government Affairs Communication
9 – 10:30 a.m.

OCT
25

Association Management Essentials: Membership 360
9 a.m. – Noon

This program will frame your Membership Strategies from a holistic perspective, and help you approach evaluating your programs and communications from a Member Value perspective, while providing real-world examples you can take back with you. This course is part of the Association Management Essentials series designed to meet the needs of entry and mid-level employees.

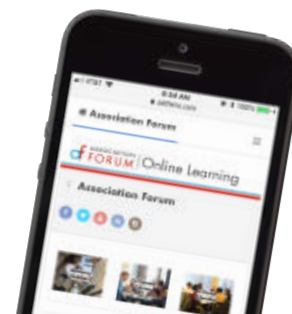
December 2018

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#2/COO SIG
9 – 10:30 a.m.

DEC
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Webinar: Navigating Holiday Showcase 30: A Guide for Attendees
11 a.m. – Noon



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Fundraising SIG
9 – 10:30 a.m.

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Association 101
9 a.m. – 4 p.m.

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Webinar: Managing People in Today's Competitive Workplace
11 a.m. – Noon

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Membership SIG: Suburban Location!
9 – 10:30 a.m.

NOV
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Meeting Professionals SIG
9 – 10:30 a.m.

NOV
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Association Management Essentials: Your Leadership Potential
1 – 4 p.m.

This program will show you how to expand your power and positive influence beyond your formal authority to get the job done and demonstrate true leadership. Leadership is not a position, it's about influence. This course is part of the Association Management Essentials series designed to meet the needs of entry and mid-level employees.

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OCTOBER 25, 2018
9 a.m. - Noon

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Presented by:



Matt Hessler, CAE
Association Manager
SmithBucklin



Mike Norbut
Vice President,
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G. Copies not Distributed	127	55
H. Total	2,020	1,830
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—Dan Shea, Content + Publications Manager

Promotions and Changes



Fred Shea, senior vice president of convention sales and services for Visit Orlando, has announced his retirement, effective March 2019. Shea has more than 40 years of experience in the hotel and tourism industry. Prior to joining Visit Orlando, he held executive roles with ConferenceDirect and Hyatt Hotels. Shea was the 2013 recipient of the John C. Thiel Distinguished Service Award from Association Forum for Excellence in Supplier Partnership. He has served on the Association Forum board of directors and is currently the chair of the AIMM Committee.



The American Association of Clinical Endocrinologists (AACE) has hired **Elizabeth Lepkowski, MATD**, as chief learning officer. Lepkowski was previously the director of education at the American Society of Anesthesiologists (ASA). She has held positions at the American College of Chest Physicians and the City of Lake Forest and holds a master's degree in training and development from Roosevelt University.



Jake Toohey has been promoted to senior digital consultant, healthcare associations at Adage Technologies. Toohey has been with the organization since 2012. He previously held roles at Echo Global Logistics and Northwestern Mutual. Toohey holds a bachelor's degree in communications from University of Illinois at Urbana-Champaign.



Katie Bender has joined Association Forum as business development strategist. Since January 2018, Bender has served as the director of association partnerships for Credly. She previously worked for Travel Alberta, ConferenceDirect, Philadelphia Convention and Visitors Bureau and spent more than 15 years as a partner at Color of Social.



Donté P. Shannon, CAE, has been named CEO of the Association of Equipment Management Professionals (AEMP), which will be managed by AMPED Association Management as of January 1, 2019. Shannon has spent the last three years as the executive director for the Specialty Advertising Association of California. He is the chair-elect of the ASAE Certified Association Executive Commission and was a 2015 Forty Under 40 Award recipient from Association Forum.



Kay Whalen, MBA, CAE, has been selected to serve a three-year term on the National Advisory Allergy and Infectious Diseases Council, which advises, consults with and makes recommendations to the Secretary of Health and Human Services and the Director of the National Institute of Allergy and Infectious Diseases (NIAID). Whalen is the president of Executive Director, Inc. (EDI). She has previously served as executive director of the American Academy of Allergy, Asthma & Immunology, the American Academy of Emergency Medicine and the Clinical Immunology Society.

New Association Forum Members

Individual Members

Jeffrey Adkisson, Grain & Feed Association of Illinois

Lucinda Armas

Heather Booton

Nathan Chamberlain, Confluence Global

Nanette Diaz, Society for Academic Emergency Medicine

John Fitzgerald, Pomerol Partners

Emily Hendershot, Nova Strategies

Casey Jones, CE21

Tracy King, InspireEd

Snizhana Kurylyuk, Society for Academic Emergency Medicine

Ali Novinger, Electric Association

Roger Quagliano, Zacuto Studios

Matthew Robertson, Edlen Electrical Exhibition Services

Jeffrey Spock, Association Revenue Partners

Courtney Stone, Air Movement and Control Association International

Lindsey Swanson, Gravitte Solutions

Ashley Vezzoso-Schaefer, Evansville CVB

Jan Vicale, Mission Inn Resort

Jordan Volpe, OpenWater

Crystal Walker, Dayton Convention & Visitors Bureau

Amanda Wells, Arlington Convention

FORUM Plus Members

Ta'Tanika Glover, Robert Kisting and Linda McKenzie-Warner, Academy of General Dentistry

Joanne Bonaminio, Meg Borst and J. Garrett Lyman, American Association of Neurological Surgeons

Yujin Maeng, American Bar Association

Ellyn Shapiro, American College of Prosthodontists

Ninah Moore, American Library Association

Kylie Mason, American Society of Neuroradiology

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Janella Kaczanko, Healthcare Information and Management Systems Society (HIMSS)

Randy Levy, Institute of Food Technologists

Cody Kauh, Precast/Prestressed Concrete Institute

Samantha Baron and Katie Lashmet, Sentergroup, Inc.

Emily Bennett, Tessa Freedberg, Sarah Heemstra, Marlee Honcoop, Megan Jay, Angel Law, Alexander Lohan, Kim Martini Fear and Lisa Sands, SmithBucklin

Katarzyna Fraczek, Society of Actuaries

Lindsay Kamowski, Patricia Micek and Margaret Rivera, Society of Critical Care Medicine

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Digital Extra

To access McKinley Advisors "2018 Economic Impact on Associations (EIA) Study," visit the digital or mobile versions of FORUM.

Better Than Expected

For more than a decade, the Economic Impact on Associations (EIA) Study from McKinley Advisors has reported on the effect of the U.S. economy on associations. In 2018, optimism is high, and that hopefulness is directly influencing tangible business decisions, but some industries are feeling the positive outcomes slower than others—the accounting/finance/insurance sector still has not returned to pre-2009 membership numbers. Architecture/construction associations, whose strength is uniquely tied to the overall economy, reported the highest level of those who are "more optimistic" about the economy than last year at 46 percent, yet that same sector also reported the second highest number of respondents who are "more concerned" in 2018.

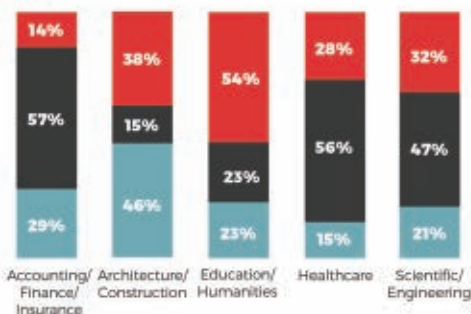
Overall, 40 percent of those surveyed reported that the impact of economic conditions was better than expected. In 2017, that number was 29 percent. This rosy outlook is leading to a loosening of the purse strings for associations, with a majority of respondents indicating that they are planning, or currently implementing, an expansion of programs at their association and that there would be an addition of new positions.

Non-dues revenue continues to be the top priority for associations. New member acquisition, the top priority as of 2016, has dropped significantly, along with improving member retention. However, developing new methods for member engagement has risen to the highest priority. In short, it seems associations are becoming less concerned with simply increasing membership numbers and are concentrating more on the active participation of their current members.

2018 ECONOMIC OPTIMISM FOR ASSOCIATION BY FIELD/INDUSTRY

Total Responses: 113

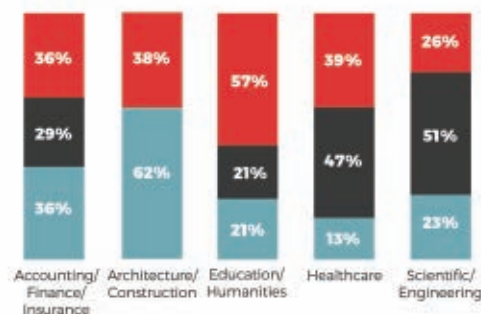
More optimistic
About the same
More concerned



2018 ECONOMIC OPTIMISM FOR INDUSTRY BY FIELD/INDUSTRY

Total Responses: 114

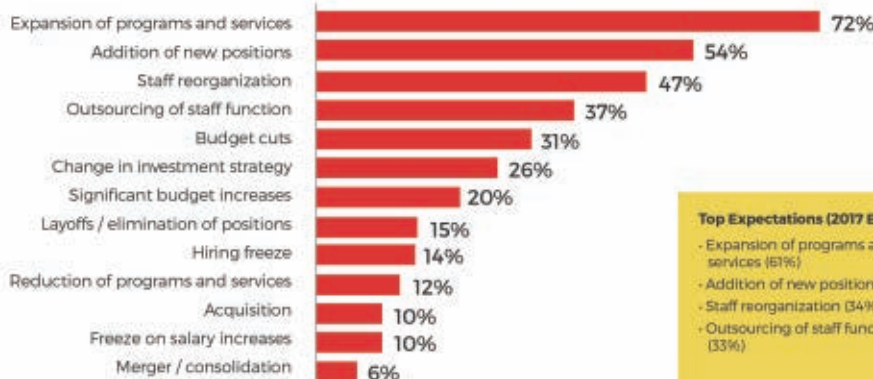
More optimistic
About the same
More concerned



WHAT DO YOU EXPECT TO HAPPEN AT YOUR ASSOCIATION IN 2018 BECAUSE OF CURRENT ECONOMIC CONDITIONS?

% Is happening now, definitely will happen and probably will happen

Total Responses: 156



Top Expectations (2017 EIA)

- Expansion of programs and services (61%)
- Addition of new positions (48%)
- Staff reorganization (34%)
- Outsourcing of staff function (33%)

Source: McKinley Advisors, "2018 Economic Impact Study,"



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