

FORUM

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INFORMING & INSPIRING
ASSOCIATION
PROFESSIONALS SINCE 1916

The Path to Tech Success is Paved with Good Questions

24

Linking In: Is Your
Social Presence
Deterring Your
Professional
Mission?

28

To Better Lead
and Manage Your
Association, You
Must Learn to See
the Future

34

A Problem-Based
Approach
to Governance

Governance Issue



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Contents

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8

IN THE SPOTLIGHT

Meet the Inaugural Class of Emerging Leaders

In 2018, Association Forum launched the Emerging Leaders Program for rising stars and aspiring executives in the association industry. We profile the 15 young professionals who make up the program's inaugural class.

24

CASE IN POINT

Linking In: Is Your Social Presence Deterring Your Professional Mission?

Is your social footprint sending the right message to potential employers and prospective clients? Regardless of how you feel about social media, networks such as LinkedIn are an integral part of your personal and professional branding and often provide people's first impression of you and your organization.

28

BIG PICTURE,
ASSOCIATION FOCUS

To Better Lead and Manage Your Association, You Must Learn to See the Future

Are you a visionary? You may not feel that you are, but according to Lloyd Shesky, clinical professor of entrepreneurship at Kellogg School of Management, you don't need to change the world in order to be a visionary for your organization. You simply need to learn how to look ahead and see the big picture, just as those executives profiled in this article did.



34 ASK THE EXPERT

A Problem-Based Approach to Governance

Effective organizations have effective governance structures. There is no one right model that fits all organizations. This article, penned by Michael E. Gallery, PhD, FASAE and Colin C. Rorrie, Jr., PhD, FASAE, discusses a field-validated and data-driven process for associations to identify problems with their current governance structure and also to develop their own solutions to those problems.

38 ASK AROUND

The Path to Tech Success is Paved with Good Questions

Asking the right questions of the right departments is one of the most important steps you can take when analyzing your association's technology and preparing to implement new software, databases or IT infrastructure. Gathering the proper information at the beginning of the process can save a lot of headaches through the end.

Departments

- 6 Heard Around
- 42 Advertisers Index
- 44 Education Calendar
- 46 Above & Beyond

Columns

- 20 Law Review

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Governance is ...

Two experts sit down to discuss the complexities of association governance

In the March 2017 issue of FORUM, Mark Engle, DM, FASAE, CAE, principal of Association Management Center (AMC), and William Brown, professor and director of the Nonprofit Management Program at Texas A&M University discussed their research into the complex topic of association governance, trends in how membership perceives the actions of their board, and how best to distribute authority to ensure a high-performing association and board.

Governance is a complex idea. How do you define governance?

Brown: I go back to Chris Cornforth's definition: "Governance is the overall direction, control and accountability of the organization." I like that definition because it captures three important ideas: 1) providing direction and helping set strategy; 2) controlling internal ideas regarding how we track what's happening in our organization; and 3) accountability, thinking about our stakeholders—how do we make sure they understand who we are and what we're doing?

Engle: In addition, I like how Beth Gazley and Ashley Bowers defined it in their book, *What Makes High-Performing Boards: Effective Governance Practices in Member-Serving Organizations*, "Governance is defined as the legal authority held by a nonprofit board of directors." It's based on shared group actions. That is the defining element of a board: as individuals, directors don't have authority; they make decisions collectively as a board. They, as a board, have the fiduciary responsibility. It means they can't really pass the buck.

Brown: So many governance functions are shared between the board and the staff, as well, but the definition is there to remind us that the ultimate responsibility resides with the board. I think they can get confused sometimes, thinking that perhaps they're not the ones who are ultimately responsible for what's going on. Amy Hillman used the terms "control" and "service": first, looking at the way the board has set responsibilities around control and accountability, as well as fiduciary issues. And then, on the service side, how do we engage with the executives to add substantive value to the organization to identify the direction and orientation. And I always add a third component, that the board has this responsibility to manage itself, and that's the governance or process element. The board has to identify how to create that climate in the group so that you can do what needs to get done.

What are the staff's and board's roles in governance?

Engle: We like to talk about that partnership between the two because it is critical that we understand the link between the board's and staff's roles in governance. On the staff side, it's more than just execution: It requires clarity to allow for good execution. The link there goes right back to the board providing that clear direction at the highest level of governance and then distributing


that authority so we get all of the working groups (task forces or committees) with their oars rowing in the same direction and in concert with the strategy.

Brown: We have this formal structure of committees and groups, but in a lot of ways I don't think we necessarily know what we might call the decision authorities that different committees have and how those committees are functioning. We might find, as we're finding now when looking into our nominating committee, for example, that most of them are doing very much the same things and not delving into anything too creative. Do you think we have a good understanding about how the committees and structures and boards are functioning and operating?

Engle: I think that's one of the mysteries in our environment these days. If we're still operating in the committee structure, there's this requirement of a function over time, as opposed to the purpose of an issue—in other words, more of a task force concept. We've got this traditional structured network that is looking for specific work and how that work feeds our strategic plan, but that link often is lost in legacy. Whereas if we're considering instead how do we empower task groups—our intellectual resources—to help feed our plan to drive our organization forward, that's more of the link we're looking for.

Brown: How do you feel about the idea of having committees that align with staff functions?

Engle: There are some exceptions—like for finance and audit, you need to have independent eyes every year for the CPA audit and budget—but, ultimately, I'd like most groups to be "issue specific." Are we looking for a new market? Are we looking for a new message? With a committee structure, so often we see a legacy issue of people coming in and saying, "Well, what should we do this year?" Instead of that, let's give them a charge. I think we're seeing a lot of high-performing organizations moving into that area. Ask the volunteer to support a short-term engagement, give them a chance to show some commitment and passion, and then see if they're a potential leader for the future.

For the full interview, check out the March 2017 issue of FORUM. 

CAE: 2019 and Beyond

As we enter 2019, we find the CAE continues to serve as our industry's seminal credential. As of the end of 2018 there were over 4,300 Certified Association Executives. If you have kept an eye on ASAE's job board over the past few years, you probably have noticed the trend of more employers seeking candidates that have their CAE.



Lowell Aplebaum,
CAE, CPF
Chair
ASAE CAE Commission,
2018-19

Even as we all observe in our own organizations, we know that an industry's certification should continually evolve and improve to better serve those who hold the credential as well as the organizations that employ them. With that focus, it is my pleasure to share some CAE updates for 2019 as well as those on the horizon:

1. C-suite Experience Requirement Shift:

Starting with applications for the May 2019 exam, those who are employed as a Chief Staff Executive or a C-suite level executive as a qualifying organization must now be an employee for just a minimum of **ONE** year. All other prerequisites remain the same.

2. Ethics Renewal Requirement: For those who will renew in 2020, one of your 40 credits of continuing education will have to be ethics focused. Please note—this is not an additional credit—it is included in the 40 as it stands today. This ethics credit can be fulfilled through qualifying professional development as currently defined.


3. Online Application/Renewal: We are currently testing a platform to shift the CAE application and renewal process from paper to an online portal. It is our hope that this will make not only easier to apply to take and renew the credential, but that through online tracking of your professional development that qualified candidates will recognize earlier in their journey to CAE that they are already on the path.

4. CAE Badge: In 2019, ASAE plans to provide a digital badge for those who hold the CAE credential. This will allow those who are current in their certification to easily be recognized for their CAE status with colleagues and potential employers.

Looking Ahead to 2020:

5. CAE Content Update: Every five years, the CAE Commission conducts a job task analysis to verify the relevancy of the domains and content of the CAE and make any necessary updates. This analysis will take place in 2019 with the first exam reflecting these content updates taking place in 2020.

6. Competency Based Education/Credentialing: Currently the CAE Commission is in a multi-year process of designing an alternate path to the CAE—one that does not count 'hours' but instead focuses on how candidates/credential holders can demonstrate their competence through how they have applied their knowledge and skills. Look for more information on this alternate path in the coming months.

As always, we hope that if you hold the credential that you are #CAEproud and will share it. And if you know someone who should have their CAE, encourage them to start their own journey by exploring asaecenter.org/cae. 



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Meet the Inaugural Class of Emerging Leaders

In 2018, Association Forum introduced a new six-month program for rising stars in the association industry, which officially launched at Forum Forward 2018 with 15 young professionals. The Emerging Leaders attended specialized sessions facilitated by leading association executives, strengthened their communication and leadership skills through one-on-one mentoring and delivered a presentation on *Tribes* by Seth Godin to an executive panel. The 2019 program will open for registration in March and kick off at Forum Forward 2019.



Keelin Billue
FAER Marketing
Specialist
American Society of
Anesthesiologists

What did you learn through the Emerging Leaders Program that you will apply to your career?

Through the Emerging Leaders Program, I feel better prepared to navigate conflict more confidently. Additionally, it was great getting to know everyone in my cohort. They challenge and inspire me.

What advice would you give to other young professionals looking to advance in their careers?

I would tell other young professionals to continue learning in both traditional (courses, mentors, etc.) and non-traditional ways (try new things, accept failure, etc.). Also, always look at the data and use it to support your goals and plans.

What motivates you as a young professional in the association industry?

I'm motivated by creating consistent and delightful assets that make people want to donate. I'm also motivated by creating more efficient processes with my colleagues.

Something always in my bag is... besides the expected things, a case of googly eyes.

2018 Emerging Leaders
Program Title Partner:





Jean Boisson

*Talent Acquisition
Specialist
American
Osteopathic
Association*

What did you learn through the Emerging Leaders Program that you will apply to your career?

The Emerging Leaders Program has provided me with invaluable techniques in managing organizational change and conflict. As a human resource professional, it's imperative that we effectively communicate and drive change when necessary and mitigate conflicts when they arise.

What advice would you give to other young professionals looking to advance in their careers?

Write down your career goals and be intentional in pursuing them. Volunteer to take on new responsibilities and dedicate yourself to development and growing professionally. Also, NETWORK, NETWORK, NETWORK!!!

What motivates you as a young professional in the association industry?

I'm motivated by the opportunity to be significant. I was raised by two selfless individuals who migrated to the U.S. in search of a better future and I strive every day to show them that their struggles were not in vain.

In 2019, I'd like to... start a business!



Ashley Daly

*Governance
Operations
Manager
Emergency Nurses
Association*

What did you learn through the Emerging Leaders Program that you will apply to your career?

One of the many things I learned while being in the Emerging Leaders Program is how to advance professionally in my career. I learned that just because I currently specialize in one area, doesn't mean I can't take on other initiatives in other areas in order to advance in my career. Taking on new initiatives opens the doors to further opportunities!

What advice would you give to other young professionals looking to advance in their careers?

The piece of advice I would give to other young professionals is to attend association events in order to gain further knowledge and experience. Attending association events allows you the opportunity to network with other professionals. Find yourself a mentor that will take you under their wings to help you network and grow professionally.

What motivates you as a young professional in the association industry?

One thing that motivates me professionally in the association industry is the thriving opportunities for growth. There are always numerous opportunities for advancement in the association industry.

My go-to coffee order is... a vanilla iced coffee with cream. Starbucks never disappoints!



Priya Garg

*Director, Student
and Young Physician
Affairs*
American
Osteopathic
Association

What did you learn through the Emerging Leaders Program that you will apply to your career?

The Emerging Leaders Program has helped me think about the big picture in associations—what drives the organization to work effectively and efficiently, and what I can do to help as a leader. The modules on communication and relationship building, as well as multiple networking opportunities, made this program invaluable to my career advancement.

What advice would you give to other young professionals looking to advance in their careers?

Work with your manager to figure out the critical skills that someone in a role above you would need and try to participate in additional projects that can help hone those skills. It's extra work, but worth it when you get a promotion!

What motivates you as a young professional in the association industry?

I love working with medical students and early career physicians. Their energy and passion keep me motivated to stay not only in the association industry, but specifically in health care.

On a Sunday morning, you can find me... reading on my couch.



Brooke Johnson

*Director of Digital
Strategy*
American
Osteopathic
Association

What did you learn through the Emerging Leaders Program that you will apply to your career?

This program has offered so many great opportunities to engage directly with association CEOs and senior leaders. One of my key takeaways: You can't be an effective leader unless you take the time to really understand the needs of your organization and members. Making the effort each day to engage a member or talk with a colleague outside your department will broaden your view of the organization and how you can make an impact.

What advice would you give to other young professionals looking to advance in their careers?

As early as you can, begin building a network of champions and supporters who can help you reach your goals. This group should include leaders and mentors within your association, as well as those outside your organization who can provide advice and feedback throughout your career.

What motivates you as a young professional in the association industry?

Helping make a difference in the lives of our members is really rewarding. And it's exciting to be part of an organization that's continually evolving to meet their needs.

My life's theme song would be... Don't Worry Be Happy!



Jaclynne Madden, CAE
Education Director
Building Owners
and Managers
Association of
Chicago

What did you learn through the Emerging Leaders Program that you will apply to your career?

All of us have strengths and weaknesses. This sounds like an obvious statement. But how often do we identify and focus on our strengths? I spend more time than I should focusing on my weaknesses, but the EL program helped me redirect my mind and energy. I excel at taking measured risks. I excel at inspiring visionary thinking. I excel at implementing the changes needed to turn those visions into a reality. But I cannot fully excel if I spend more time focused on my imperfections than my superpowers. I am a young, non-profit professional. I am a change maker, as are my 14 other EL teammates!

What advice would you give to other young professionals looking to advance in their careers?

I have two quotes posted on my refrigerator that I look at – Every. Single. Day.

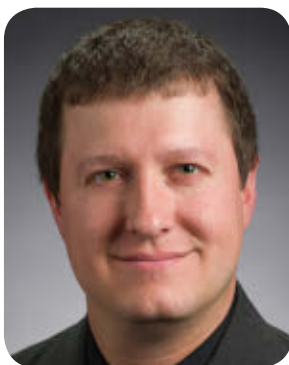
1. *Push yourself because no one else is going to do it for you.*
2. *You did not wake up to be mediocre.*

Association professionals can become so focused on advancing the careers of their members that they lose sight of their own professional development. Education is a lifelong endeavor for all of us – your members and YOU. Don't wait for your boss to tell you to take a class. Push yourself. Find classes and opportunities that match your goals and needs. Network. Take advantage of everything Association Forum has to offer. And finally, give 200% to everything you do. None of this will be hard if you truly love your profession and your job.

What motivates you as a young professional in the association industry?

Nothing motivates me more than watching my members succeed and rise through the ranks within their industry. The best and most memorable days are when members call me to tell me that they were promoted or found a new job with a larger role. This is what makes the association industry so fulfilling – your hard work pays off and positively affects the lives of others.

A hidden talent of mine is... I am a chandler...and no...I'm not talking about Friends. Chandler is an occupational term for a candle maker. I taught myself how to make a wide variety of candles in all shapes, sizes and colors. I also mix oils to create unique, fragrant scents.



Matt McNutt
E-Learning Specialist
Arthroscopic
Association of
North America

What did you learn through the Emerging Leaders Program that you will apply to your career?

Being a good leader doesn't always mean making the easiest or most popular choice, but the one that improves the lives of those it impacts.

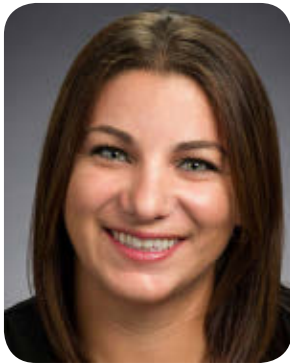
What advice would you give to other young professionals looking to advance in their careers?

Utilize all resources available to expand your network and personal knowledge, these will help you take those next important professional steps when you least expect it!

What motivates you as a young professional in the association industry?

Understanding the needs of our members and how we best can assist in our own way to improve their busy daily work lives. The "virtual smile" that we receive back from a member always manages to help those times of question.

If I could eat one thing for the rest of my life, it would be... Little Caesars pizza. KING of cheap/quick pizza on a movie or game night.



Michelle Michelotti

Director of Online Learning
American Association of Clinical Endocrinologists

What did you learn through the Emerging Leaders Program that you will apply to your career?

I have learned interesting insights from the Emerging Leaders Program. As I build my leadership strengths, I am learning new ways to achieve a greater impact. This course has taught me to understand the leader inside me and the executive judgement and decision-making challenges I may need to overcome in my career.

What advice would you give to other young professionals looking to advance in their careers?

Define who you are and what leader you want to become.

What motivates you as a young professional in the association industry?

The interest I have in my field of work is what motivates me as a young professional. Having that key mentor as my guide is what I really look for as a young professional.

If I could eat one thing for the rest of my life, it would be... chocolate chip ice cream.



Mike Moran

Director of Business Development
American Osteopathic Association

What did you learn through the Emerging Leaders Program that you will apply to your career?

The power of communication. Quite a few associations endure similar challenges—connecting with association professionals outside of your association can help those in need learn about other's experiences in conquering similar challenges.

What advice would you give to other young professionals looking to advance in their careers?

Maintain lines of professional communication with your peers both inside and outside of the association space, and inside and outside of your industry. Innovation and creativity can come from anywhere, but you have to be willing to find it.

What motivates you as a young professional in the association industry?

There is a pendulum shift in the association space that all leaders are focusing on: meaningful technological innovation. As a young professional given an opportunity to support an association in drafting their blueprints for technological innovation, it is quite inspiring and motivating.

In 2019, I'd like to... run 5 miles with my dog



Stephen Rangel
*Digital Marketing
Manager*
CCIM Institute

What did you learn through the Emerging Leaders Program that you will apply to your career?

It was eye-opening to hear stories from other association professionals who might not be in the same field as me yet understand what their experience is from a different perspective. It helps me be more conscious of other departments and their needs in my own association.

What advice would you give to other young professionals looking to advance in their careers?

Just keep striving. Even though you might not feel like you're making a difference, you actually are. Don't let an email that didn't get the engagement you wanted, or a campaign that didn't get the response you wanted, keep you down. Keep tweaking and improving yourself every day. You'll eventually get where you want to be. Data is king.

What motivates you as a young professional in the association industry?

What motivates me is that one day my work will have an impact on greater society. Even though I might not have a direct impact on the commercial real estate industry today, I know that my work will help drive the industry in a positive and ethical direction.

Something always in my bag is... a pack of Ice Breakers mints because you never know if you're going to meet the love of your life at any moment. You have to be prepared.



Allison Read
Associate Director
American
Bar Association

What did you learn through the Emerging Leaders Program that you will apply to your career?

The Emerging Leaders Program has provided me with tools to strategically plan a career path based on my specific goals and helped identify the education and experience needed for professional career advancement. Through our group discussions, including Executive Presence and A Day in the Life of a CEO, we gained valuable insight into the realities of holding a top-level position within an association.

What advice would you give to other young professionals looking to advance in their careers?

Be a sponge! Soak up as much knowledge as possible, whether it's education provided by your association or participating in programs such as the Emerging Leaders Program. It is important to be as educated as possible in areas outside of your specific job function, especially if you are interested in executive and upper management positions. Most importantly, find a mentor and be a mentor to those in the association industry.

What motivates you as a young professional in the association industry?

Working with unpaid volunteer members who put in a tremendous number of hours to advance the mission of our organization and who are passionate about serving our members needs at the highest level is what motivates me the most. Association's across the board are in a time of innovation, which I also find to be very exciting on a professional level.

In 2019, I'd like to... pass the CAE exam!



Vanessa Velasco
Senior Manager,
WE Local,
Marketing & Events
Society of Women
Engineers

What did you learn through the Emerging Leaders Program that you will apply to your career?

Being a part of the Emerging Leaders Program has given me the opportunity to meet and learn from leaders (in the industry) who are pursuing the same dreams and passions I have for my career. Hearing from their “lessons learned” and areas of opportunities has allowed me to re-align my tasks to best reach my career goal.

What advice would you give to other young professionals looking to advance in their careers?

I would offer a few bits of advice. Pursue the opportunities that cross your path. You may not always have the “okay,” but you have to be your best advocate—and remember, humility then honor. Get out of your (own) way! Be confident in your decisions and always seek knowledge (ASK) from someone who has been down your path.

What motivates you as a young professional in the association industry?

The Association’s members and the growth of team members I work with—whether that’s a direct or indirect report. I love watching them learn, thrive and grow. It’s important to share our knowledge and you never know the information you have how it can help someone (personally or professionally).

In 2019, I’d like to... visit at least five of the 15 highest waterfalls in the world. Norway, anyone?



Maggie Voves
Programs
Coordinator
American Society of
Anesthesiologists

What did you learn through the Emerging Leaders Program that you will apply to your career?

To find new ways to look at your career to find new opportunities for growth and education. Learn from adverse experiences and apply new strategies to handle them.

What advice would you give to other young professionals looking to advance in their careers?

Always network. Building relationships is an invaluable benefit of the association industry.

What motivates you as a young professional in the association industry?

I’m motivated by working in an environment that encourages personal and professional development. Associations focus on the people that they serve and the ways to help and benefit them which gives our work meaning and value.

On a Sunday morning, you can find me... watching TV with my cats Hans and Yadi.

Not available
for comment:



Becca Daly
Governance and
Operations Manager
Arthroscopy Association
of North America



Kristin Etherton
Meeting Planner
American Society of
Anesthesiologists

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30 Years of Holiday Showcase

On December 13, 2018, Holiday Showcase celebrated thirty years of bringing together meeting planners, destination reps and business service providers with the Chicagoland association community.



The festivities kicked off on the night of December 12 with the Opening Reception, sponsored by Destination Cleveland, featuring the famous cinnamon-rimmed pours of Great Lakes Christmas Ale. Down the hall, association executives gathered at the exclusive CEOnly Reception, while over in the West Tower of the Hyatt Regency Chicago, the 2018 class of Forty Under 40 recipients toasted their collective accomplishments.

The next day, attendees filed past Association Forum's Timeline Wall and into the Grand Ballroom for a packed Opening Brunch. The Brunch featured a special acknowledgement of

the Founding Visionaries of Holiday Showcase, calling up to the stage six of the key players who helped launch the show 30 years prior. The Brunch concluded with an inspiring message from the keynote speaker, Michael Sam. Sam told his story of overcoming adversity and poverty to become a standout college football player and the first openly LGBTQ player to be selected in the NFL draft.

Holiday Showcase will return for its 31st year on December 19, 2019, at the Hyatt Regency Chicago.



CEOnly Summit

Mindfulness for Executives

At this year's sold-out CEOnly Summit, held at Holiday Showcase, the theme was mindfulness and the attendees explored this concept through a presentation on healthy living, as well as a panel discussion with two CEOs who had faced serious health-related issues that recalibrated how they approached their roles.


Kristen Johnson Brogan, chief nutrition officer of On Target Living, asked of the executives in the room what choices they made in their daily lives that affected their ability to be successful. As CEOs, it can be easy to be overworked and develop poor mindfulness habits that lead to increased stress and decreased focus. Johnson Brogan shared tips from her book, *Healthy Target Living*, and easy-to-navigate charts on mindful eating and mindful living.

Johnson Brogan then moderated a panel discussion with Stephen Stahr, CAE, and Abe Eshkenazi, CAE. Both Stahr and Eshkenazi are association CEOs—Stahr runs Million Dollar Round Table, while Eshkenazi helms APICS. Stahr and Eshkenazi also have in common that they both encountered a sudden turn in their health that nearly took their lives.

During the panel, Stahr and Eshkenazi shared the details of their stories along with how it affected their views on leadership. In both instances, the organizations they helmed were without a CEO practically overnight. For Eshkenazi, he admits that as soon as his health trouble began, he never once thought about APICS. The board called him to wish him well, but other than that, he had no contact. To disconnect so completely was both necessary as he fought for his life, but also the result of having the right team in place that was trained to know their roles and operate autonomously.

"My responsibility is to develop people," said Eshkenazi. "To allow them to actualize themselves."

Stahr connected his leadership style with an early interaction he had with a doctor, when a life-or-death decision needed to be made in a moment. The seasoned CEO analyzed the situation and made a choice wherein he gave the doctor the best opportunity to succeed by delaying a surgery until he was able to gather the right team and resources.

In the end, both CEOs returned to their positions and, as Johnson Brogan put it, "They now pay attention to life a little more on purpose." 





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Recent Tax Law Developments

Q: Last year, I noted a number of articles regarding changes in the tax laws relative to exempt organizations, like our association. What do I need to know?

A: Over the past year, the federal government adopted several changes relating to the taxation of exempt organizations. Most stem from the December 2017 adoption of the Tax Cuts and Jobs Act (TCJA), which includes new unrelated business income tax (UBIT) rules for exempt organizations. The government has issued interim guidance, but has not yet published proposed regulations, with respect to those new rules. In addition, the IRS has modified long-standing rules regarding reapplication for exempt status. The following is a brief explanation of the most talked about changes, each of which has the potential to affect a broad range of tax-exempt associations.

New Silo Rules under UBIT.

The TCJA called for the adoption of new Section 512(a)(6) of the Internal Revenue Code (IRC), which requires exempt organizations with more than one unrelated trade or business to calculate their unrelated business taxable income (UBTI) separately for each. In the past, exempt organizations could offset profits realized from one unrelated business activity against losses incurred from another. The new rules require “siloing” of profits and losses by activity. In August 2018, the IRS released Notice 2018-67 to provide guidance regarding the new rule. The Notice acknowledges that “Congress did not provide criteria for determining whether an

exempt organization has more than one unrelated trade or business or how to identify separate unrelated trades or businesses for purposes of calculating UBTI.” Thus, it permits reliance on a reasonable, good faith interpretation of the IRC, including use of the North American Industry Classification System (NAICS) codes for classifying separate trade or business activities. Nonetheless, organizations with unrelated business income (UBI) from activities such as advertising, insurance programs, and partnership investments will need additional guidance in meeting their compliance obligations.

Excise Tax on Executive Compensation. The TCJA also requires employers to pay a 21% excise tax on the sum of compensation in excess of \$1 million and any excess parachute payment to a covered employee for taxable years beginning after December 31, 2017. Notably, the IRS has stated that “compensation” subject to the new tax includes not only base salary, but also the cash value of retirement benefits, certain retention payments, and benefits that have vested but have not been received. As a result, the new tax is likely to affect a range of exempt organizations. On December 31, 2018, the IRS issued Notice 2019-09 to provide interim guidance on the excise tax, but questions remain with respect to such matters as the potential exemption (“grandfathering”) of employment agreements that were in place prior to the change in the law; the treatment of compensation vested but not paid prior to the TCJA’s effective date; and the concept of “substantial risk of forfeiture.” As with the new silo rules, the IRS will allow exempt organizations to rely on a good faith reasonable interpretation of the statute, including guidance provided by the Notice,

in determining whether, and how much, excise tax is due.

“Parking Tax” on Exempt

Employers. The TCJA also called for the adoption of new Section 512(a)(7) of the IRC, which taxes exempt employers that provide parking or on-premises athletic facility benefits to their employees. Specifically, beginning January 1, 2018, the expenditures associated with providing those benefits will represent taxable UBI. As with the siloing and executive compensation excise tax rules, the IRS issued Notices to provide preliminary guidance. Among other things, the Notices confirm that the cost of providing the benefits, not their value, represents the amount of UBTI to the exempt organization. Where the benefit consists of a specific third-party payment per employee, or a pretax reduction in employee salary, those amounts will be subject to tax. Additional rules apply to employers that own or lease parking lots with parking spaces for employee purposes. Significantly, exempt organization employers will have until March 31, 2019, to reduce or eliminate the number of spots they reserve for employees, and thereby reduce their tax liability retroactive to January 1, 2018.

Reversal of IRS Policy Triggering Reapplication for Exempt

Status. Last year, the IRS also issued Revenue Procedure 2018-15, which reversed the Service’s long-standing policy requiring exempt organizations to re-apply for tax-exempt status if they change their state of incorporation or otherwise restructure through incorporation or merger. The government explained that “requiring a new exemption application after a corporate restructuring often is unnecessary and duplicative, because the IRS requires exempt organizations to report significant

organizational changes on their annual Forms 990.” In making the change, the IRS reasoned that it is less burdensome to resolve issues when the restructuring organization and the surviving organization can continue to use the same Employer Identification Number (EIN) on their annual Form 990 Information Returns. Thus, the IRS concluded that a surviving organization need not file a new exemption application if it is a domestic business entity classified as a corporation, provided the organization or organizations involved in the restructuring are in good standing. In addition, the articles of incorporation of organizations exempt under Section 501(c)(3) must continue to meet the organizational test regarding dedication of assets for exempt purposes. The new Revenue Procedure does not apply to limited liability companies, foreign business entities, or partnerships; those organizations are still required to file a new exemption application following any restructuring.

Last year’s tax law changes affect organizations differently. Regardless of the immediate consequences, however, it is important for exempt organizations to familiarize themselves with the new rules so that, going forward, they can take the new tax rules into account in making informed policy and financial decisions. **cf**

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.

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



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Using the Sustainable Development Goals as a Global Gateway

By **Bonnie Koenig**

The Sustainable Development Goals (SDGs or Global Goals) are a list of 17 goals agreed upon by world leaders in September of 2015. These goals, which range from ending poverty to climate change action, are a broad blueprint allowing ample opportunity for engagement that are being used by many organizations as a gateway to connect globally.

The Global Goals and Agenda 2030 build on the success of the Millennium Development Goals (2000-2015) and aim to go further to end all forms of poverty. The United Nations conducted the biggest public consultation in its history to ask which issues should be included in the new goals. It was agreed that 17 Goals were needed to accommodate a wide range of people's views. They include several areas under the umbrella of fighting poverty including clean water, climate change, education, energy, health and infrastructure.

Like other documents and efforts with universal appeal (and media attention) the SDGs, when understood and used effectively, can help associations in many ways including:

- Finding like-minded partners to forward their own work and increase their impact.
- Learning about how others around the world are tackling similar challenges.
- Enhancing their opportunities to catch the attention of policy makers, funders and others who are following these broader global issues.

Introducing the SDGs to a wider audience has been catching on and there are now many online portals such as SDG insights (www.sdginsights.org) and SDG Guide (<https://sdg.guide>) that curate information about the SDGs that can be useful to organizations looking to engage with them. The SDG Philanthropy Platform also has a very useful indicator wizard (sdgfunder.org/wizard) to show which SDGs relate to your work and some ideas for how you can track your association community: "...The implementation of the SDGs opens up new avenues. Now, more than ever before, being strategic...means forging partnerships and becoming a force for action in various multi-stakeholder coalitions under the SDG umbrella."

And as an added bonus, you get to use the colorful, eye-catching Global Goals logo!

Here are some Association Forum member examples:

- The Public Library Association (PLA) staff shared that over the next few years, the Public Library Association will be introducing SDGs to their work with US public libraries. Libraries have evolved and are providing services that meet critical community and societal needs, and SDGs are a good framework for connecting and articulating this work. They are not well understood in the U.S., but the PLA hopes to make more information on them available through promoting the work of its partner, the International Federation of Library Associations and Institutions, (IFLA). The IFLA's work includes a publication available to help local libraries and their users make connections to the SDGs and

Action 2030 Agenda and a report launched at the UN High Level Political Forum on SDGs in 2017, Development and Access to Information (DA21). The reports show how access to information (a key function of libraries) contributes to the SDGs—all over the world, including in the US. It also demonstrates that access to information enables social, economic and political development and can transform lives.

- In November, the American Academy of Pediatrics (AAP) released a new policy statement, "The Role of Pediatricians in Global Health," which describes how the SDGs, and global health principles provide a shared frame of reference for a) pediatricians addressing health inequities both within the United States and internationally, and b) for the AAP's partner international pediatric societies. NCD Child, a global coalition for which the AAP serves as secretariat, provided two AAP members—Mychelle Farmer, MD, FAAP, and Francis Rushton, MD, FAAP with a small grant to educate pediatricians in the United States about the relationship between their clinical practices at home and the needs of children around the world, and to help mobilize pediatricians for action. On the global level, the AAP advocated for the inclusion of children in relevant health-related SDG targets and indicators, and the AAP supports partner societies to achieve SDG 3 ("good health and well-being") targets in their own countries. The AAP provides support through trainings, curricula, and other programs, including Helping Babies Survive, tobacco prevention and cessation projects, and a partnership to strengthen capacity for global pediatric immunization champions.
- The Lion Clubs International notes that the SDGs are closely tied to the work that they do as an international service organization. In 2016 they launched a video contest challenging youth to show how they support the SDGs locally. The contest was heavily promoted on social media and incorporated both trending (#SquadGoals) and UN (#SDG #GlobalGoal #Youth4GG) hashtags to gain traction. The hashtags associated with global goals helped to reach an audience beyond current members and highlight our relevance in the global arena. Some of the user-generated content received through the video contest was high quality and is now being shown at international events and UN partner meetings. 

Bonnie Koenig is a consultant working with associations on international engagement and other program and governance strategies. She is the current facilitator of Association Forum's International Conversation Circle. She can be reached at bonnie@goinginternational.com or 773.233.5755.




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A collection of various social media icons, including Pinterest, Instagram, LinkedIn, VSCO, Google+, Messenger, Twitter, YouTube, Facebook, and Snapchat, are shown as if they are hanging from thin blue strings against a white background.

Linking In: Is Your Social Presence Deterring Your Professional Mission?

By **Amy Thomasson**

W

hen is the last time you met someone in either a professional or personal setting and thought, “Looks like I’m completely neutral on Sandra. I have formulated zero opinions on her personality, mannerisms and communication style.” Well, the answer for all of us is a resounding, “Never.” In fact, according to Princeton psychologists Janine Willis and Alexander Todorov, we form opinions of strangers within a tenth of a second of meeting for the first time.

“Whether you like it or not, your online presence is telling a story about you and your organization. While you don’t have to be the Charles Dickens of social media to craft your story, you do need to put some sweat equity into your online equity.”

Data from a 2017 USC Annenberg report shows that the average American spends nearly 24 hours a week online, so it’s reasonable to infer that our online presence matters nearly as much as our physical one. Whether you like it or not, your online presence is telling a story about you and your organization. While you don’t have to be the Charles Dickens of social media to craft your story, you do need to put some sweat equity into your online equity.

As a marketer, who has spent a fair portion of my career crafting and executing brand strategies, including personal and professional social media optimization, I’ve developed four C’s of social media optimization to utilize as my credo.

Clarity

There are two main areas where your social footprint requires clarity. The first is medium, and the second is message. By medium, I am referring to the various social platforms, including Instagram, Twitter, Facebook, YouTube, LinkedIn and more. In an environment of increasing demands and limited discretionary time, you’ll get the most return on your investment by picking one medium and sticking with it. For most professionals, the most useful medium is LinkedIn, as it will allow you the best opportunity to engage with others and enhance your personal brand.

Once you’ve gotten clarity on your preferred medium, the next step is to craft your message. Begin by pulling out the most recently updated version of your resume, as this can serve as a starting point from which to build from and a helpful memory jogger on previous roles and responsibilities. Next, take a step back to craft your elevator pitch, a brief summary of your unique value and experience. This is an opportunity for you to convey to members, volunteers, peers and recruiters exactly what you want them to know about you. While you can’t prevent others from formulating opinions, you can steer those opinions using clear, compelling personal language and data.

Credibility

Would you purchase a home with shoddy craftsmanship or a product with questionable reviews? Why would your online personal brand presence be any different? As a hiring manager, I can tell you that I search every potential candidate online who has passed through the first round of screening. As someone who recently secured a new position myself, I can tell you that my new organization certainly looked me up.

Your online profile is an excellent opportunity to establish your credibility before you walk into any in-person meeting, be that a meeting with your board of directors or the recruiter for the new position you’re attempting to secure. You should begin to establish your social credibility by completing a full and accurate LinkedIn profile (see LinkedIn Visibility Maximizer Checklist for guidance and to assess the current status of your profile). Remember that in the absence of data, and unfortunately often even with it, snap judgements will be formed.


Clout

LinkedIn presents an excellent opportunity to build your visibility with recruiters and secure new roles. As a personal testament, I’ve secured two roles from direct outreach via LinkedIn. However, that doesn’t mean that it’s all about the job search. Building and optimizing your profile is all about a focus on continuous improvement, helping to convey your professional clout.

Have you mastered a new skill, obtained a certification or joined a volunteer organization? What better way to share it with your peers through a single communication? Just don’t forget that it’s not all about you. Be sure to elevate and encourage the achievements of others in your network. The benefits of recognizing others will come back to you tenfold in goodwill and good feelings.

Collaboration

While your professional social presence may often seem like one-way communication, don’t neglect opportunities for true engagement. As someone who pivoted from for-profit, corporate marketing to professional associations three and a half years ago, the main thing I love about association management is our community. There are a wealth of individuals and groups willing to assist, elevate and educate you at every stage of your career.

An optimized social profile is merely a footnote if you’re not also using it to connect and engage. Check out your colleagues’ profiles and ask them to introduce you to mutual connections. Share or create meaningful content with and for your peers. Your unique perspective and insight adds value to our community. 

Amy Thomasson is director, marketing for the Congress of Neurological Surgeons. She can be reached at athomasson@cns.org.

LinkedIn Visibility Maximizer Checklist

Complete profiles, known as All-Star, are 27 times more likely to be found in recruiter searches and 3 times more likely to appear in other LinkedIn searches. To obtain All-Star status, a profile should include industry, education, location, current position, a profile photo, five key skills, a complete summary and a compelling headline.



Have you:

- ☐ **Added a profile photo** – You'll receive 21 times more profile views. Make sure your photo is recent, reflects your current appearance, and is a high-resolution professional headshot. Reserve the selfies for another time!
- ☐ **Included your name and location** – Consistency is key. Your LinkedIn name should match the name on your resume and business cards and email. If you have a graduate degree or professional certification(s), this is also the place to add them.
- ☐ **Update your headline** – Your profile headline will default to your current job title, but to broaden your scope of reach update this area with hard skill keywords instead, i.e. 'Proven Nonprofit Development Director: Fundraising, Major Gifts, Grants, Charities, Communications'
- ☐ **Completed your summary** – This is the place for your elevator pitch. Allocate LinkedIn's allotted 2,000 characters to a brief biography, quantifiable accomplishments (think dollars and percentages here), and additional hard skill keywords.
- ☐ **Updated your experience** – Include your current position, past relevant positions and job scope and key accomplishments for each.
- ☐ **Displayed your education** – You'll obtain 10 times more profile views by adding your education.
- ☐ **Added media** – Think about how you like to learn. Many of us better absorb information through visuals, and this also applies to your LinkedIn profile. Add files or links to websites, photos, videos and presentations that illustrate your achievements and tell the brand story of 'you.'
- ☐ **Listed your skills** – You can add up to 50 hard skill keywords relevant to your experience, goals, function and industry. Use the pre-populated skill name whenever possible to enhance profile views of those searching for a skill area.
- ☐ **Included your volunteer experience** – Here's a great place to display your Association Forum volunteer roles or other volunteer efforts. Some recruiters consider pertinent, unpaid experience as equivalent to paid.
- ☐ **Gotten active** – The more you engage, the more you get back. Login, post, comment and message regularly.

Checklist written by Christian Moritz and provided with permission of Klaxos, with minor additions by Amy Thomasson.



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To Better Lead and Manage Your Association,

***You Must
Learn to
See the
Future***

By **Lloyd Shesky**



Over the past several decades, the business communities and those who study, analyze and coach them have focused on management and leadership. Admit it! You've spent considerable time learning to be a better manager and leader of your association.

See What's Right in Your Future

Occasionally, thoughts turned to business visionaries. Every so often, along comes a Bill Gates, a Steve Jobs, a Ross Perot, an Elon Musk, or a Howard Schultz. All are true change-the-world visionaries. They are accorded suitable praise and even reverence, but they are viewed as aberrations, the few among millions.

I'm not here to denigrate the true visionaries. I'm here to tell you that (i) there are many business visionaries whose visions change something less than the whole world; (ii) you can learn to be such a visionary for your association; and (iii) doing so will benefit your association and make you an invaluable leader and manager.

Professor Warren Bennis distinguished managers from leaders, saying, "Managers do things right; leaders do the right thing."

I would add to that, "Visionaries see what will be right in the future."

Yes, I am suggesting that you learn to see the future, and I assure you that you can. If that makes you picture me as a swami with a crystal ball and consider not reading any further, please don't do that. I'm not here to promote magic. If anything, I'm here to bust your crystal balls and to teach you how to see the future despite that.

Not All Futures Co-Exist (Ross Perot)

I don't think I need to tell you that you and your association would be better off if you could see the future, but "how?" you ask. Actually, your future is readily visible if you know where to look and if you realize that not all organizations' futures happen at the same time. Let me give you an example.

In my latest book, *Visionaries Are Made Not Born*, I tell the story of Ross Perot. Perot is best known as a candidate for president of the United States, but he was also the founder of two immensely successful computer businesses that sold for billions and a successful real estate investor.

When his kids were still young, every Sunday after church and lunch the Perot family went for a ride in the family car, always winding up at the outskirts of Dallas where Ross had bought sizable desert-like acreage. The kids sat in the back of the car, eyes rolling, as Ross surveyed his land and described the future and what types of real estate would be where: Housing there, stores here, industrial over there. He did so with his military style, seemingly commanding the future to be as he saw it.

Years later, when the property was developed almost exactly as Ross had described, his kids were certain their father had special powers of vision. He did, but likely not in the way that his kids thought. There was no crystal ball. He had paid attention to and understood how other communities developed, how Texas cities in particular were formed and expanded, and what other zoning commissions were thinking and approving at that time.

The Lesson: Perot understood that others had already existed in their own future and had experienced something akin to his and Dallas's futures. He felt that his Dallas property's future would be similar, even though separated by distance, or by myriad other details. That's likely a big part of your reason for belonging to Association Forum—to learn how other organizations have dealt with their futures before similar futures confront you.

“People learn early on what is alike and different, and it seems it is often easier to emulate and replicate what is similar to us. However, it is sometimes more meaningful and rewarding to seek similarities and lessons from dissimilar situations.”

Emulate Dissimilar Role Models (Bob Walter: Cardinal Health)

As you observe other successful associations (what I call Beyond-the-Eaves Vision in *Visionarie\$ Are Made Not Born*), some with totally different missions and functions, find a piece or pieces from each that you can emulate and adapt to your situation. Then, apply those, together or separately, to your situation. You'll find that there are valuable lessons in seemingly dissimilar organizations.

My kids grew up watching “Sesame Street,” and I marveled at the power of their lesson: “Some of these things are not like the others.” People learn early on what is alike and different, and it seems it is often easier to emulate and replicate what is similar to us. However, it is sometimes more meaningful and rewarding to seek similarities and lessons from dissimilar situations:

Cardinal Foods, a distributor to grocery stores, was acquired by Bob Walter. Almost immediately, Cardinal ran into a difficult competitive situation where competitors were seemingly selling to grocery stores at prices Bob could not match.

First impulses might have dictated observing other grocery distributors, who were most similar to Cardinal, but Bob had no access to their operations strategies, so he chose another route. He saw the future by peering laterally at companies who were already in his future. He observed his customers' (the grocers') discounting patterns, and the grocers' customers' (consumers') buying patterns. By doing so, he detected patterns, e.g., buying at times when sales ran on certain goods. That let him deduce what his competitors were doing. He came up with a unique way of measuring using algorithm science and armed with that information was able to compete effectively and eventually successfully enough to expand

into healthcare products. He soon changed the company name to Cardinal Health and it is now a multi-billion dollar publicly-traded company.

The Lesson: Walter realized that every transaction has two sides, and often, understanding one side can enable you to anticipate the other side's future tactics and strategy. Then if the other side of the coin enters the future before your side does, the lessons can be profound.

Perhaps a personal story will help:

When early computers arrived on the scene, I had a vision that my firm would be totally computerized. So, I bought a computer and hired someone to give me “computer lessons.” It didn't work. Between lessons, I would be travelling or otherwise focused on client and firm matters and forget what I learned by the next lesson.

One day, I was at O'Hare Airport, at a United Airlines counter. I noticed the agent doing her work on a computer and asked how she had learned to do that. She said that United gave her lessons. “Computer lessons?” I asked. “No.” she said. “Ticketing lessons.” One side of my coin was the computer, but I had forgotten that the other side was the tasks I wanted to accomplish using a computer. Seeing how the airlines had entered their future, even though their future was dissimilar to mine, awoke me to do that.

The Past Is Prologue (Rick Waddell: The Northern Trust)

That's easy, you think to yourself, but how does the very first person or organization to be confronted with a particular future see it before the fact? Another story from *Visionarie\$ Are Made Not Born* may help.

Seeing the future sounds feasible only by peering out into days yet to come, but that's not the only route. Sometimes, the future is based on platforms gleaned from the past.

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Northern Trust is a bank but very different than other banks. The vast bulk of its income comes from asset management fees, not from interest for lending money.

During the 2008-09 Great Recession, shortly after Rick Waddell had become CEO of the Northern Trust Company, many of the bank's customers couldn't liquidate their high-yielding securities. They were not bought from Northern Trust, and Northern Trust had no obligation to solve those customers' problems. In fact, doing so might create a huge loss on the bank's P&L, which could put Northern Trust's ownership at risk. It might necessitate cutting executive compensation, risking executives' exits and ultimately might have caused Rick his dream job.

Of course, all those possibilities would be in the future. Waddell considered such prospects but couldn't know the future with certainty. Some would say good visionaries gauge future risks and rewards by envisioning the future. I think it's not always so simple. Sometimes, one can see future risks but must look to the past to measure future rewards.

As part of his deliberations, Waddell opted to look back to the past. He focused on the company's long-standing culture and principles of loyalty to and support of its customers. Such Retro Vision, one of five elements of vision I discuss in *Visionaries Are Made Not Born*, is a methodology of looking to the past to create infrastructure in the present for decisions that will illuminate or create the future.

The Lesson: Waddell and his team did good homework, and the future risks were clear. The potential reward—including doing the right thing—necessitated looking to the past, which enabled him to see what would be right for Northern in the future. Indeed, the past was prologue to Northern's future.

Looking to the past is out of fashion. In our fast-changing society, looking back is so yesterday, in every way. Back then, your association was archaic—pen and paper, not computers. But I'm not suggesting you sacrifice modern technology and systems. Keep those; they allow you to keep up with today's fast pace of progress and change. However, you can also reach back to fundamental principles and cultures that worked

in your association at some time in the past. Then you, or someone you select, should work at adapting past principles in the current circumstances.


Use All Your Senses (Ross Perot; David Abney: UPS)

Vision isn't just visual. It's maintaining all your senses to be alert and constantly aware of what's going on around you and around the world. Ross Perot listened to customers and made billions. David Abney, CEO of UPS, spent his first year listening to stakeholders and based critical decisions on what he heard. In both cases, they learned what the future had to be by listening to the input dots and then rearranging the dots to become their visions of the future. Doing as they did will make you a visionary, which can make you indispensable in your association and with its members.

Indirect Senses (Fred Smith: FedEx; Kay Koplovitz: USA Network)

If you can't use your senses directly, for example if you're situated remotely and too far away to sense their future, then use indirect methods. Fred Smith, CEO and founder of FedEx, reads incessantly to learn trend patterns globally. Kay Koplovitz, whose USA Network brought us satellite TV, went back to school for a Master's degree in geosynchronous orbiting satellites.

You Can Be What You "See"

All those people featured in my book, *Visionaries Are Made Not Born*, proved to be extraordinary managers and leaders, largely because of their visions. You can do the same. 

Lloyd Shefsky is a business consultant, a retired clinical professor at the Kellogg School of Management and the author *Visionaries Are Made Not Born*. You can find out more at www.lloydshefsky.com.

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A Problem-Based Approach to Governance

By **Michael E. Gallery, PhD, FASAE**
and **Colin C. Rorrie, Jr., PhD, FASAE**

Effective organizations have effective governance structures. There is no one right model that fits all organizations. This article discusses a field-validated, data-driven, process for associations to identify problems with their current governance structure and also to develop their own solutions to those problems.

Procedures for Governance Evaluation and Redesign

While many organizations attempt to remodel their structure—few succeed. The fault lies not with the individuals but with the general approach typically used. Some organizations attempt to engage in the process without outside help. Such groups are seldom effective in looking objectively at what is broken and what needs fixing. And, there is no shortage of ideas of how to re-structure. The problem is that there is not often agreement among those offering suggestions.

Other organizations engage the services of an outside consultant. The consultants carefully study the organization and then offer a variety of recommendations to address the issues they have discovered. Such recommendations are typically ignored, particularly if those recommendations call for major change. They are ignored because they are often viewed as the consultants' solutions to problems the members have not accepted. The shortcoming again lies with the approach. There is a better way.

We have found that people will not agree with a solution, unless they first agree with the problem. Most governance reviews (both internal and external) focus on solutions without first getting consensus on the problems. Therefore, peo-

ple choose sides based on the solution they like best and the "sides" never reach agreement... or agree to a watered-down version that offends no one... and pleases no one. In order to successfully bring about changes in governance, the people within the organization must first own the problems with the structure and then become invested in the solutions to those problems.

Our approach is based on the principles of performance improvement. The organization is viewed as a system with three critical parts:

- Outcomes* – clearly defined mission, goals, and objectives
- Performance* – the strategies and tactics to use to achieve those objectives
- Structure* – the policies, budget, technology, and talent pool that needs to be in place to support the required performance

An effective governance structure is one that ensures these parts work together to produce what no part can produce on its own. Therefore, the process for review and revision of a governance model must be both systematic and systemic. Problems do not occur in isolation. Therefore, solutions aimed at resolving superficial symptoms will fail.

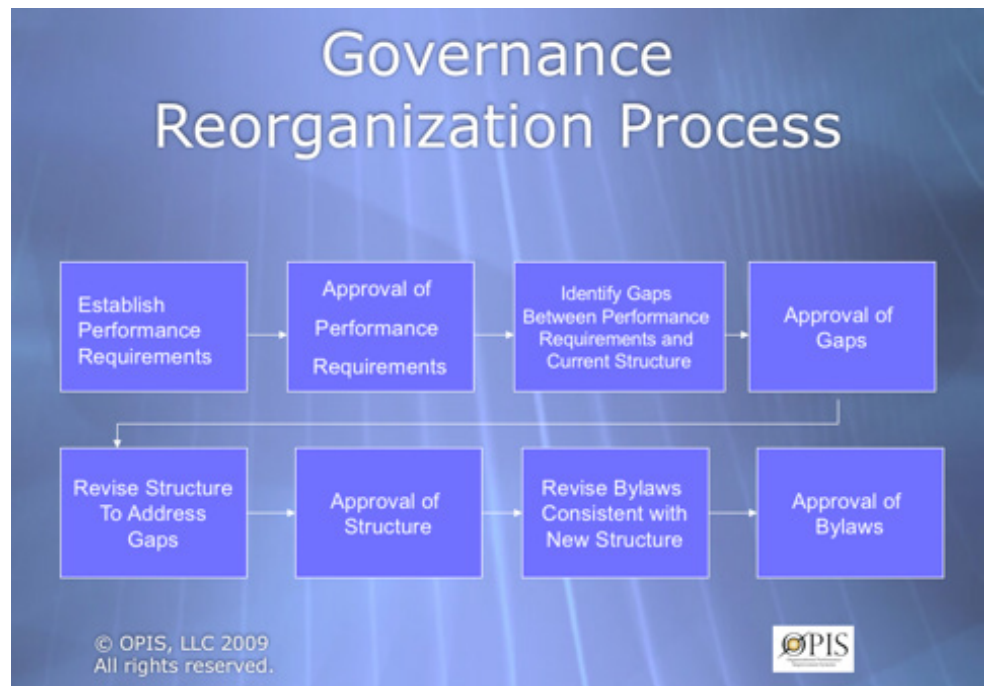
In the *Handbook of Human Performance Technology*,

experts in performance improvement define a problem as a critical difference between what should be and what is. Our process is designed to help staff and leaders of the association (not us, the consultants) identify what problems exist within their structure and then to assist them (not us) in developing their own solutions consistent with their strategic plan and their unique culture.

An outline of the process appears in the sidebar. A specific description of each step follows:

Formulation of A Governance Taskforce (GTF): It is critical that the leadership be involved with and invested in the process. We suggest the association form a governance taskforce composed of 12-15 members. We also recommend that a past-president be appointed to serve as chair of the taskforce and that its membership include the president-elect, some past presidents, the CEO, committee chairs, a few board members-at-large, and one or two leaders who are not currently on the board but have been critical of the organization at times in the past. It is important that the group reflect not only diversity in position but diversity in thought as well.

Develop Performance Requirements: As we have noted, we define a problem as the critical difference between what is and what should be. In order for the organization to identify any problems with its structure, it must have clear agreement on what should be. If a couple engages an architect to design a new house, the architect will ask several questions regarding function, such as: “Do you have a large family?” “Do you entertain?” etc. In a similar way, it will be important for the association to first agree on the design features that any governance model it develops should meet. We refer to these as performance requirements. When developing performance requirements, the GTF should address the following questions: Regardless of how the organization is structured, what important features or requirements must any structure have to be acceptable to the organization? Examples of performance requirements developed by our clients include: “Committees and task forces are created and disbanded consistent the strategic plan. All members of the board should be actively engaged and accountable.” At this step, no discussion of the current model or issues with that model are entertained. The discussion focuses solely on what elements the members of the GTF believe SHOULD be present.



Board Approval of The Performance Requirements: It is important for all to agree on what should be. Board members are asked to approve the list of performance requirements as developed by the GTF. Our experience with this step is that while the Board may make some slight modifications to the list, the GTF's work is typically approved by the board as presented.

Gap Analysis: With the performance requirements in place, the GTF is now ready to identify problems. It compares the organization's current model with its approved performance requirements and identifies any gaps that might exist. For example, assume the organization has a performance requirement that states that all board members be actively engaged in and accountable for actions of the board. It is an axiom of group behavior that the larger the group, the less opportunities for individual engagement and the greater difficulty in enforcing accountability. In analyzing this performance requirement, the group would be asked to determine whether the size of its board is consistent with the performance requirement. It is important to know that the discussion at this stage is confined to identifying problems—NOT solving them. As earlier noted, discussing solutions without first agreeing on the problems is counterproductive. Our job as consultants at this phase is NOT to tell the organization what its problems are. Rather, our job is to assist the organization in objectively comparing what is to what should be. Our experience in performance improvement and association governance provides assistance in that assessment.

Board Approves Gap Analysis: The purpose of this step is to get board consensus on the problems, if any, with the current structure. As was true of the previous step with the GTF, the Board's discussion should focus on agreement with the problems and not with any attempts to resolve them.

Design A New Model: Once problems have been identified and agreed upon, we work with the GTF to design options



to address the performance requirements and problems identified by the taskforce. A basic principle of performance improvement involves the concept of “equifinality,” as found in *An Introduction to General Systems Thinking*. Said simply, this principle asserts that several acceptable methods can be used to reach the same end. Consistent with this principle, we work with the GTF to develop several options for meeting the performance requirements. Each option is accompanied by an assessment of advantages and disadvantages. Once those options are thoroughly investigated, the GTF reaches consensus on which option it will recommend to the Board.

Vet New Model: Communication with key stakeholders in the organization is critical. The truth is, the vast majority of your members do not know how you are currently structured—nor do they care. They want to know what value you provide for their dues dollar. That said, there is a group, usually around 10 percent or less, who are volunteering their time in some form or fashion and do have a stake in how the organization is governed. Communication with these stakeholders is critical. It is important to communicate to various groups what the current problems are, how they were identified, and how the proposed solutions are designed to correct them. Placing things in this context makes for more orderly and logical discussions. As you communicate the solutions, you will undoubtedly receive some push-back. Under our process, you are able to positively manage that push back by responding with a question rather than a rebuttal. That question being, “If you are unhappy with our proposed solution, what improvements can you suggest to better solve the problem.” Faced with this question, reasonable people will either see the value in your solution or offer a better way. Our experience has been that through this vetting process, the proposed new model is tweaked and refined. The process also creates buy-in with key stakeholders.

Refine Model Based on Feedback for Vetting Process: It has been our experience that the vetting process leads to improvements in the proposed model. The GTF uses the data from the process to make appropriate changes.

Board Final New Model: The board is asked to approve the GTF’s recommendations for changes to the organization’s governance structure.

Bylaws: Once the board has approved the recommendations, we prepare a draft of new Bylaws that conform to the newly approved model. It has been our experience that such changes are usually numerous and best handled by a totally new set of Bylaws that will replace the current ones. If, however, changes are minor, we draft amendments to the current Bylaws. The GTF reviews the draft to ensure the elements in

the Bylaws are consistent with the newly approved model. Once the GTF approves the draft it is submitted to the Board for its approval. In either case, new or revised Bylaws, we often find that there is more information included in the current Bylaws than is necessary, often operational processes. This information should be included in policies and procedures that can be easily updated by the board of directors as opposed to going through the formal Bylaws updating process.

Transition Plan: It is doubtful that any organization will be able to automatically transform from what is to what should be with the simple passing of Bylaws. We work with the GTF to develop a transition plan specifying what steps will be taken to move toward the new governance model. The plan specifies what will be done, when, by whom and at what cost. The objective of the transition plan will be to affect an effective transition while causing the least disruption.

Example: A State Dental Association

All state dental associations are “chapters” of the American Dental Association (ADA). While each state association has its own Bylaws, most pattern their governance structures after the ADA’s. The group with which we worked had nine geographic districts within it. Each district had one seat on the board to which they elected or appointed a board member. Each district also had alternate board members. The ultimate governing body of the organization was a House of Delegates (HOD) composed of delegates from each district, the number of delegates for each being proportional to the number of members in each district. The HOD met once annually. This governance structure had been fundamentally the same since the 1840’s.

The client formed a governance taskforce consisting of officers, delegates, board members, committee members, and state and district staff. They developed 17 performance requirements that were reviewed and approved by the board and the HOD. The GTF next performed a GAP analysis and identified about 14 problems. Key to this discussion were the following problems:

- a) The structure should facilitate each member in carrying out his/her fiduciary roles of care, obedience, and loyalty. Because board members came from districts, some board members, and more importantly, most members within the district, were of the mistaken belief that the board member was to vote for what was best for the district rather when, in fact, their duty of loyalty required that they vote for what was best for the majority of members in the state.

“In order to successfully bring about changes in governance, the people within the organization must first own the problems with the structure and then become invested in the solutions to those problems.”

- b) The process should enable the recruitment of the most qualified members to serve. The structure of having membership by district meant that when choices had to be made among which leaders to serve, geography trumped aptitude.
- c) The body with the legal liability for a decision should make the decision. Under state law, the board, not the HOD, was liable for decisions made. However, under the association's structure, the power to make the final decision rested with the HOD.

Through a series of meetings and vetting, the GTF recommended a structure with the following key elements:

- a) The board would be composed of officers and 9 board members-at-large.
- b) The board would have the authority to make final decisions.
- c) The HOD could forward resolutions to the board on matters of policy. Such resolutions were advisory and not binding.
- d) The HOD would elect the officers and the board members at-large.

This model had to be approved by both the board and the HOD. The HOD controlled amendments to the Bylaws, and such amendments required a 2/3rds vote of that body. The changes were approved by more than 75% of the delegates. As one can imagine, many delegates were reluctant to give up the authority for final decisions. However, because the HOD had previously approved the performance requirements and because they had also previously agreed on the gaps, the vast majority of the delegates realized that the proposed solution was, in fact, the best solution for the problems identified.

Key Areas to Consider and Pitfalls to Avoid

We have worked with numerous organizations to revise their governance structure and we have experienced governance reviews and restructuring as staff of an association. Based on those experiences we offer the following considerations:

Take as Much Time as Required To Bring About Change:


Effective change requires buy-in and buy-in takes time. Some organizations can move faster than others. It is important that you move at a pace that does not leave key stakeholders behind.

Communicate Often: While most members have no interest, those who do have interest also have influence. They will want to be kept abreast of what is happening. That said, it is also important to ensure messaging does not get ahead of you. For example, while the GTF is working on models and exploring options, it will be counterproductive to have that information “leaked.” Changes should only be communicated when they are fully thought out and ready to be vetted. Communicating the process that will be used, as well as progress on each step will improve the chances for success.


Governance Is NOT Government: Associations are non-profit corporations. How a political entity should be governed and how a corporation is governed are often vastly different. What is right for one is not always right for the other. For example, the duty of corporate board members is not to represent the issues of their constituents. Their duty is to be responsive to the needs of the members as a whole. It will be important to separate issues of corporate governance from those of governmental bodies.

Avoid Confusing Solutions with Problems: All of us, at times, confuse the two. For example, the statement: “The problem is we need a smaller board.” does not state a problem, rather, it states a solution, i.e., a smaller board. It begs the question “why?” The answer to which is, in fact, the problem. Consider this statement “We need a board whose members are actively engaged. Currently they are not.” Now we have stated a problem—and one of many potential solutions is to reduce the size of the board. It will be important for the leadership to constantly keep people focused on problems first and solutions second.

Remember That Consensus Is Not Unanimous Agreement:

If it were, consensus would be nearly impossible to achieve most of the time. We define consensus as meaning that while not all agree with the decision, all can live with it. We have found this definition has served our clients well. 

Michael Gallery, PhD, FASAE and Colin Rorrie, PhD, FASAE are both consultants with OPIS, LLC. They have a combined experience of over 70 years in the association management profession serving as CEOs, COOs, members and officers of boards, speakers, consultants and authors. You can contact them at mgallery@opisconsultants.com.



The Path to
Tech Success

is Paved with
**Good
Questions**

By **Marilyn Mages, CAE**



Most people have a love-hate relationship with their software, databases and office infrastructure. It's been a perennial issue since the dawn of the computer age.

For every AMS, LMS, or CMS—even a phone system—an organization installs, there are as many opinions on whether it's a good system or bad one. The fact is, when working with technology, there is a lot that happens between the proposal process and the implementation. Specific direction and understanding of the process is critical to ensure that any transition is successful whether it's an upgrade or a new install.

The starting point for any organization is to ask questions about how the software is going to be used in each and every department and then use that information to evaluate what you have and what you might need to move forward.

Key people can help direct the many moving parts by documenting and creating a plan to guide staff through the process. Here are some suggestions on how an organization and its software, databases and CMS programs can be more functional.

Conduct an Audit

Experts agree that it is necessary to conduct a technology audit first. Why? It is the only way to evaluate holes, software misfirings or needed upgrades. While it seems like a huge undertaking, it is important to conduct. You can start with someone on your staff or hire a consultant to do the necessary work. The idea is to gain an objective

opinion if the systems are working for you, if they are being used to its potential, if there are valid reasons to get something new, and what might be needed to fit the organization appropriately. The end goal is to look at systems, infrastructure, digital media and more in one big picture.

Consultants are a good idea because they can provide an objective opinion. They can provide information as to whether a system is working properly and what it would take if a new system was implemented or upgraded to better fit the organization's needs. They also tend to stay informed about industry trends. For a nonbiased viewpoint, avoid a consultant who has vendor affiliations.

Jim Gibson, strategic consultant, technology management, DelCor Technology Solutions, says "We work with a lot of organizations to help make sure they are on the right path."

He thinks technology audits are a good idea because they provide benchmarks and help discover where you are, where you need to be, and provide documentation to support your choices.

"Often organizations don't use software correctly or provide the right type of training. They should understand their requirements and needs, not just purchase a new program or software system because a task may not work as expected," says Gibson.

Evaluating Your Current Technology

Take the following steps prior to starting an evaluation of your technology:

- Don't take on any new projects until you develop a list of technology priorities.
 - Gain solid understanding of your association or nonprofit's top-level priorities to inform your decisions.
 - Talk to senior staff and/or department heads about their plans to achieve these goals.
 - Ask if these projects align with strategic objectives.
 - Ask if the budget exists to fully support these projects—not only the purchase of the system, but also requirements analysis, project management, initial and ongoing training, maintenance, and upgrades.
 - Dedicate resources to specific projects, once you know what's in the IT pipeline.
 - Work with senior staff and a cross-departmental team to prioritize your pain points and projects.
- The decisions you reach may not be unanimous, but broadly representative participation is crucial.

“The starting point for any organization is to ask questions about how the software is going to be used in each and every department and then use that information to evaluate what you have and what you might need to move forward.”

Choosing a consultant can be challenging, so asking colleagues or going to Association Forum's MyForum can provide you with information about how other organizations have accomplished the same goal as well as helping you narrow down the task at hand.

But consultants are not the only way to go, especially if you have a staff person capable of getting the answers.

“We did not conduct a formal audit, but we wanted to know in which areas technology was being used correctly or processes that needed to be improved,” says Angela Lasky, senior project manager, American Association of Diabetes Educators. “We held what we called ‘IT to the Rescue’ meetings involving senior staff, stakeholders and subject matter experts to determine our technology needs.”

Pushing Ahead

Compare the features of the system you currently have with the new system. “New is not always better. You have to ask, can it deliver on what you don't like?” says Jim Pearson, PMP, JPX Solutions.

Keeping up with the competition will help organizations determine if the upgrade or new system is right. In fact, Pearson believes it is important to ensure any new system will add features and functionality, not take it away.

While IT manager at a St. Louis association, Pearson experienced a pilot program for an Internet-based phone system that ended in failure. The critical error: Only looking at the bottom line. The new system lacked popular features such as announcing a call before forwarding, and it was not as easy to use. In order for a project to succeed, he says the end goal always should be based on the requirements created by and for the end-users.

Being adaptable is also important because organizations must work within the confines of a program. If staff is using workarounds like spreadsheets, it will hinder the use of information in addition to making it difficult for the organization to see the big picture.

In the evaluation process, Lasky found that AADE could use their software more effectively. They came back with a process improvement plan, new software suggestions, and an easier way to share ideas. These goals will help remove the silos created by work arounds.

The AADE's project plan will help get them to where they need to be. The plan focuses internally on updates to processes in the AMS, an upgrade to the latest version of the AMS, a new Online Community Rollout, and externally featuring updates to DANA a new member benefit website providing diabetes educators with technical and training information about new technology.

Finding the next step

There is always something new, something to update and something to implement. Once the audit is complete, a list of next steps should become clear. Categorizing these into high, medium, and low priorities and developing a timeline with the corresponding task will be key to finding the right direction and successfully embracing

Questions to Ask When Determining Technology Needs

When determining how your software and infrastructure meet your needs, Jim Gibson, strategic consultant, technology management, DelCor Technology Solutions, recommends that you start by asking the following questions:

- How does your existing technology assist or hinder progress toward achieving those goals?
- Is the technology you already have sufficient for the job?
- What options exist that will make the job easier?
- Can any of those options be used to achieve other goals or support other activities?
- How do your existing business processes help or hinder achieving those goals?
- Do you see options for streamlining or improving processes with the help of technology?

the necessary changes. The development process also includes knowing your key performance indicators (KPOIs) and then matching them with what needs to be accomplished.

“Once you know what’s in the IT pipeline, start dedicating resources to specific projects,” says Gibson. He also suggests it is crucial to get buy-in for each of the priorities.

Lasky says this is exactly what AADE did. The organization completes an upgrade every two years and will make certain updates in the opposite year. This includes enhancements to the website, AMS and email. But in the process, they identified other projects that would make tasks easier for individual staff across all organizational areas. These have all been documented and a strategy created to ensure that the tasks will be accomplished.

If working with a consultant, it is important to dedicate a staff member to shepherd the responsibility of executing the report. This person can be the COO, director of finance or someone on senior leadership.

Training

Technology is designed to perform in a certain way. Whether or not staff understands the intricacies of the software is another story.


“Don’t take short cuts when it comes to training, it is core to the process and generally

individuals need more of it than less,” Gibson says. “A recent client reinvested in training and it made a huge difference in their system’s performance.”

This training, he says, was geared toward specific departments, instead of the generic training that is given when a system is just introduced.

“The membership department uses the AMS differently than the marketing department, therefore, training should be directed to those specific interests,” says Gibson.

Final Note

While your organization might not like its current system, it might not mean a complete software overhaul. Start by understanding the systems and how they work together, make sure the technology is secure, and the key is to have a roadmap guiding the process. 

Marilyn Mages, CAE, has worked in associations for 20 years. She is currently freelancing. She can be reached at memages30@gmail.com.



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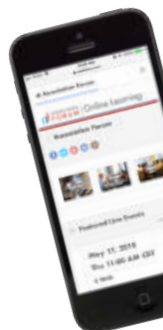
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Institute of Food Technologists,
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11 a.m. – Noon</p> <p>FEB 26 IT SIG: What Does A Successful IT Project Look Like?
9 – 10:30 a.m.</p> <p>FEB 27 Governance SIG: Suburban location!
9 – 10:30 a.m.
3025 Highland Pkwy Ste 225
Downers Grove, IL 60515-5506</p> <p>FEB 28 Lunchtime Program: Seeking & Assessing Innovative Talent for Your Team
12 – 1 p.m.</p> <p>FEB 28 Finance SIG
9 – 10:30 a.m.</p> | <p>MAR 7 Women's Executive Forum
8:30 a.m. – 6 p.m.
W Chicago - City Center
172 W. Adams St., Chicago, IL 6060
<i>Engage current and future women leaders in the association and non-profit community in critical conversations regarding issues unique to women in the industry.</i></p> <p>MAR 12 YP SIG - suburban location!
9 – 10:30 a.m.</p> <p>MAR 12 Governance Essentials: Effective Practices for Staff
9 a.m. – 12 p.m.</p> <p>MAR 13 Meeting Professionals SIG
9 – 10:30 a.m.</p> <p>MAR 14 C-Suite Breakfast: The Great Debate: Investment Trends & Strategies
7:30 – 11 a.m.</p> <p>MAR 21 Webinar: Driving Digital Engagement in a World Without Trust
11 a.m. - Noon.</p> <p>MAR 26 SIG Summit 2019
11:30 a.m. - 6 p.m.
Palmer House, a Hilton Hotel
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Promotions and Changes



Carol McGury has been elected chair of PCMA's Education Foundation Board of Trustees. McGury is the

executive vice president, event and education services for SmithBucklin and has served on Association Forum's editorial working group and gala steering committee. Her tenure as chair began immediately following PCMA's Convening Leaders meeting in early January.



Barbara Connell, CAE, CMP, has been named CEO of the American Society of Gastrointestinal Endoscopy

(ASGE). Connell has been with ASGE since 2007, previously serving as the organization's chief operating officer. She has served on or chaired a number of Association Forum committees, including the Professional Practices Committee, the Holiday Showcase Program Advisory Group and the Nominating Committee. Connell has also served as the chair of Association Forum's Board of Directors.



The American Association of Anatomists has named **Bill Rowan** as director of communications and

marketing. Previously, Bill was the marketing manager for DelCor Technology Solutions, in addition to roles with the Council on Foundations and the Institute for Transportation Research & Education, among others. Bill earned a Master of Arts degree in Strategic Communication & Leadership from Seton Hall University.



Dan Hickey has joined DelCor Technology Solutions in October as a strategic consultant in technology man-

agement, specializing in strategic IT planning and outsourced CIO services for DelCor's association

and nonprofit clients in Chicago-land. Most recently, he was CIO at the Dental Assisting National Board. Dan held previous roles at the American Massage Therapy Association and Personify Corp. (then TMA Resources). Dan is a Project Management Professional (PMP), certified by the Project Management Institute.



Kerri Leo has been named the director of education development for the American Association of Clinical

Endocrinologists (AAACE). Leo joins the organization from the American Society of Anesthesiologists (ASA), where she was the accreditation and joint providership manager. She previously worked for the Society of Actuaries (SOA) and Association Forum. Leo is currently the chair of Association Forum's Editorial Working Group.



Michelle Michelotti, M.H.A., has joined the American Association of Clinical Endocrinologists (AAACE) as director

of online learning and technology. She was previously the senior simulation education manager at the American Society of Anesthesiologists (ASA). Michelotti is a member of the inaugural class of Association Forum's Emerging Leaders Program.



Amy Thomasson has been named the marketing director for the Congress of Neurological Surgeons

(CNS). She joins the organization from the Council of Supply Chain Management Professionals (CSCMP), where she was director, member retention and chapter development. Thomasson is member of Association Forum's Editorial Working Group and is a Forty Under 40 Award recipient.

In Memoriam



Raymond J. Hall, longtime CEO of the Electronics Representatives Association (ERA) and a former board

member of Association Forum, passed away in November at the age of 80. He was considered a mentor and leader by many in the association industry. Hall was a founding member of Meeting Planners International (MPI) and is a member of its Hall of Fame, was an inductee in the Events Industry Council (EIC) Hall of Leaders and served on numerous advisory boards including Walt Disney World, Marriott, Sheraton, American and Delta Airlines.



Louis B. Raffel, the first president of the American Egg Board, passed away in December at the age of 87. He was

an honorary lifetime member of Association Forum and the 1993 recipient of the Samuel B. Shapiro Award for Chief Staff Executive Achievement. Raffel was a visionary in his field and was responsible for the famed "The Incredible Edible Egg" advertising campaign that launched in 1976. He began the springtime tradition of presenting the First Lady of the United States with a Commemorative Egg, which continues to be a part of the White House Easter Roll.

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