

# FORUM

MARCH 19 V103 N2

INFORMING & INSPIRING  
ASSOCIATION  
PROFESSIONALS SINCE 1916

## Healthy Options for Meetings

30

The Business  
of Association  
Education

34

Preparing for  
an Office Lease  
Expiration

38

CEOs Ask,  
Young Professionals  
Answer

20 for 2019: A Look at Circuit,  
SmithBucklin's Annual Trends Report on Page 20







• GATEWAY TO THE ROCKIES •

# BOOK YOUR MEETING

AURORA, CO



Contact Our Sales Team Today! | [VisitAurora.com/FORUM](http://VisitAurora.com/FORUM) | 720.484.8902 | Follow us at @visitaauroraco



# Contents

Follow Us



10

IN THE SPOTLIGHT

## Appropriate Workplace Conversations in a #MeToo World

An increased focus on workplace harassment has some worried that levity at the office is on the chopping block, but those fears are majorly overblown. It's still possible to tell jokes in the workplace without creating a hostile work environment or risking offense by just using a little discretion.

24

CASE IN POINT

## Healthy Options for Meetings

Health-consciousness in the meetings industry is becoming the norm. How can you make sure you're providing your attendees an opportunity to be healthy at your conference? FORUM looks at some innovative ways that organizations are putting wellness on their conference agendas without breaking a sweat.

30

BIG PICTURE,  
ASSOCIATION FOCUS

## The Business of Association Education

The pursuit of knowledge has been a cornerstone reason that people join associations for centuries. As the need for non-dues revenue rises in many organizations, the business considerations of the education piece are becoming more complicated and more important. Debra Zabloudil, FACHE, presents eight principles that should be a part of the conversations around your education portfolio.



## 34 ASK THE EXPERT

### Preparing for an Office Lease Expiration

Your office lease is up soon for your association headquarters, and you have some big decisions to make. Gregg Witt, SIOR, from CBRE is here to provide some items to consider as you begin the review process.

## 38 ASK AROUND

### CEOs Ask, Young Professionals Answer

Association executives are continuously under pressure to recognize and understand what makes the newer generations of employees and members tick, so FORUM asked association CEOs to submit the questions that they've always wanted to ask of young professionals. We posed those questions to three rising association professionals who provided their insights on the industry, their needs as employees and more.

### Digital Extras

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



- Personify's *"Young Members 2.0: Understanding and Benchmarking the Membership Preferences of Millennials and Generation"*

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

### Departments

- 5 Letter from the CEO
- 6 Heard Around
- 42 Advertisers Index
- 44 Education Calendar
- 46 Above & Beyond

### Columns

- 14 Law Review

## Publisher

Michelle Mason, FASAE, CAE  
mason@associationforum.org

## Content + Publications Manager

Dan Shea  
shea@associationforum.org

## Graphic Design Manager

Matthew Baldwin  
baldwin@associationforum.org

## ADVERTISING REPRESENTATIVES

### Senior Manager, Business Development

Phyllis Scott  
312.924.7033  
scott@associationforum.org

### Marketing Strategist

Brittany Thompson  
800.369.6220, ext. 3452  
bthompson@naylor.com

**FORUM** (ISSN 1056-0092) is published monthly with combined January/February, June/July and November/December issues by Association Forum, 10 South Riverside Plaza, Suite 800, Chicago, IL 60606. Periodical postage paid at Chicago, Illinois, and additional mailing office. POSTMASTER: Send address changes to FORUM, 10 South Riverside Plaza, Suite 800, Chicago, IL 60606. Subscription rate for members is \$15, which is included with dues.

**Copyright © 2019** by Association Forum. All rights reserved. Statements of fact and opinion are the responsibility of the authors alone and do not imply an opinion on the part of the officers or members.

**FORUM's** mission is to serve as an innovative resource that anticipates the needs of the association management profession.

**Editorial Contributions.** You are invited to share your expertise and perspective. Article ideas and manuscripts should, whenever possible, reflect real and specific experiences. Before writing, please contact Association Forum at 312.924.7031 for the **FORUM** Editorial Requirements & Guidelines, or obtain them at [www.associationforum.org](http://www.associationforum.org). **FORUM** reserves the right to edit all articles.

## BOARD OF DIRECTORS

### Chair

Lynne Thomas Gordon, CAE  
American Association of  
Orthodontists

### Chair-Elect

Mitchell Dvorak, MS, CAE  
International Association  
of Oral and Maxillofacial  
Surgeons

### Secretary-Treasurer

Geoffrey Brown, CAE  
National Association of  
Personal Financial Advisors

### Immediate Past Chair

Rob Paterkiewicz, CAE,  
MBA, IOM  
Selected Independent  
Funeral Homes

### Directors

Marc Anderson  
Executive Vice President  
Choose Chicago

Gregory Heidrich  
Executive Director  
Society of Actuaries

Brad Kent, CTA  
Senior Vice President/Chief  
Sales & Services Officer  
Visit Dallas

Colleen Lawler, CAE, IOM  
Executive Director  
Society of Cardiovascular  
Anesthesiologists

Kimberly Mosley, CAE  
President  
American Speciality Toy  
Retailing Association

Carol Pape, CAE  
Chief Operating Officer  
Association of Professional  
Chaplains

Paul Pomerantz,  
FASAE, CAE  
Chief Executive Officer  
American Society of  
Anesthesiologists

Butch Spyridon  
President/CEO  
Nashville Convention &  
Visitors Corporation

### President and CEO

Michelle Mason,  
FASAE, CAE  
Association Forum

### Legal Counsel

Jed Mandel, J.D.  
Chicago Law Partners LLC

## FORUM EDITORIAL WORKING GROUP, 2018-2019

### Working Group Chair

Kerri A. Leo

### Vice Chair

Teresa Brinati

### Board of Directors

**Liaison**  
Mitchell L. Dvorak

### Staff Liaison

Dan Shea

### Members

Connie Arkus  
Jennifer Clark  
Charles Cohon  
Chloe Daniels  
Courtney L. Kiss

JoAnna M. Leon  
Marilyn Mages  
Lisa J. Mikita  
Brooke Morris  
Len Murphy  
Dan Nielson  
Mary Ann Passi  
Lynn Pehanich  
David R. Siehoff  
Matt Switzer  
Amy Thomasson  
Candice Wartier  
Nathalie Williams  
Gregg F. Witt

10 South Riverside Plaza, Suite 800  
Chicago, IL 60606

Phone: 312.924.7000  
Email: [shea@associationforum.org](mailto:shea@associationforum.org)  
Web: [www.associationforum.org](http://www.associationforum.org)







# Catch the Biggest *Wave* in Event Technology. In Boston.



Free Wi-Fi, 10-Gig Network, and over 35,000 Surfers.

Boston is committed to staying at the forefront of event technology. Our innovative IT services include free building-wide Wi-Fi to keep your guests connected, and a 10-gig fiber network that expands to 100 gigs for the industry's fastest Internet speeds. Not to mention bandwidth for over 35,000 simultaneously connected devices plus 24/7 in-house IT support. Your technology needs aren't just met, they're exceeded.

Schedule a site visit or learn more at [SignatureBoston.com](http://SignatureBoston.com) or 877-393-3393.

**Boston. Bringing Great Events to Light.**

*Signature*  
**BOSTON**

Remarkable experiences.  
Imagination realized.

MASSACHUSETTS CONVENTION CENTER AUTHORITY

# Operating with Integrity

At the outset of 2019, the United States found itself in a precarious position—we were 11 days into what would become the longest government shutdown in history. Around 800,000 workers would begin missing paychecks while still being required to show up for work, including the TSA agents who keep us safe when we travel.



**Michelle Mason,**  
**FASAE, CAE**  
*President & CEO*  
Association Forum

As the shutdown dragged on, it was easy to feel helpless. But at Association Forum, we decided that we would not stand by and do nothing to help and support these government employees. One of our core values is Integrity, and given the opportunity to act upon that value, the Association Forum staff brainstormed ideas on how we could assist those furloughed employees who were suddenly without paychecks.

As a result of that impromptu ideation session, we put into action a fundraiser to buy Target gift cards for TSA agents at O'Hare and Midway airports. The hope was to assist in the purchase of groceries and other important day-to-day items and do our part to relieve the financial pressure that these federal employees were under. With help from Marc Anderson, COO of Choose Chicago, who put us in touch with executives at the airports to advise on the best way to provide these gift cards, we set up a GoFundMe and reached out to our members and board of directors to donate.

With the Association Forum Foundation matching every dollar that was donated, we raised \$3,550 in a short time. Then, gift cards in hand, Association Forum staff set off for the O'Hare and Midway airports to drop them off to the grateful hands of TSA representatives.

As a mission-based organization, it is imperative that we live our core values every day and exemplify them through our words and actions. There is no shortage of ways for an individual to help their community and those in need. At Association Forum, we seek to be the change in the world that we want to see, and we wish to thank our board of directors and members for their support in enacting that change.

*Michelle Mason*



## **Be A Welcoming Environment**

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

## **Embrace Innovation and Quality**

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

## **Have Fun and Stay Positive**

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

## **Open and Honest Communication and Teamwork**

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

## **Accountability—Own It**

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

## **Win with Integrity**

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



# Association Industry Meeting Metrics (AIMM)

AIMM gives you access to real-time data on the multi-billion-dollar Chicagoland association meetings market with metrics including:

- Where meetings are held - rotational patterns
- When meetings are held - timeframes, by vertical association segment
- Quantity and size of meetings (number of meetings per year, peak rooms needed)
- Venues used (hotels, convention centers, resorts, airport locations, etc.)

Check it out today at  
**[AIMMForum.org](http://AIMMForum.org)**

## Association Industry Meeting Metrics (AIMM) Founding Partners





## Congratulations to the new class of Association Forum Member CAEs!

**Robert Birdsell, CAE**  
*Membership Manager*  
ISACA  
Schaumburg, IL

**Michael Blake, CAE**  
*CEO*  
Hospitality Technology  
Next Generation  
Schaumburg, IL

**Patricia Sprindys Carrera, CAE**  
*Sr. Director, Member Experience*  
Association of Legal Administrators  
Chicago, IL

**Christopher Carrier, CAE**  
*Director of IT*  
APICS  
Chicago, IL

**Norma Castrejon, CAE**  
*Director, Information Technology*  
National Commission on  
Correctional Health Care  
Chicago, IL

**Sean M. Dolan, CAE**  
*Deputy General Counsel*  
APICS  
Chicago, IL

**Patrick Donnelly, CAE**  
*CEO*  
American Oil Chemists Society  
Urbana, IL

**Jason Friske, IOM, CAE**  
*Director of Chapter Operations.*  
Association for Corporate Growth  
Chicago, IL

**Jennifer Gibson, CAE**  
*Communications and Public  
Relations Manager*  
Matteson, IL

**Michelle Goldberg, CAE**  
*Account Executive*  
Sentergroup Inc  
Chicago, IL

**Katie Keel, CAE**  
*Account Executive*  
Bostrom  
Chicago, IL

**Audra Kubilius, CAE**  
*Education Manager*  
Society of Critical Care Medicine  
Mount Prospect, IL

**Joseph George Lindahl, CAE**  
*Senior Account Manager*  
Association Management Center  
Chicago, IL

**Jaclynne Madden, CAE**  
*Associate Director of Marketing  
and Education*  
Building Owners and Managers  
Association of Chicago  
Chicago, IL

**Kristin McGill, CAE**  
*Senior Director, Membership and  
Senior Director, Corporate Outreach*  
Illinois CPA Society  
Chicago, IL

**Molly Murray, CAE**  
*Field Representative*  
American Medical Association  
Chicago, IL

**Veronica Noland, CAE**  
*FAER Programs Specialists*  
American Society of Anesthesiologists  
Schaumburg, IL

**Stephanie Rennie-Sanchez, CMP, CAE**  
*Senior Manager, Conferences and  
Meetings*  
American Society of Safety  
Professionals  
Park Ridge, IL

**Jorge Rivera, CAE**  
*Director of Membership Development*  
National Roofing Contractors  
Association  
Rosemont, IL

**Gonzo Schexnayder, CAE**  
*Director of Digital Product  
Management*  
American Society of Anesthesiologists  
Schaumburg, IL

**David Sjolander, CAE**  
*Chief Operating Officer*  
Hospitality Technology  
Next Generation  
Schaumburg, IL

# Appropriate Workplace Conversations in a #MeToo World

By Jon Vegosen

The #MeToo movement has been a long time coming. Back in the early 1990s, some people thought that Anita Hill's accusations against Clarence Thomas during his Supreme Court confirmation hearings would usher in significant change in preventing workplace harassment. While the accusations and hearings resulted in widespread media coverage, extensive commentary, and increased anti-harassment training in the workplace, they unfortunately did not produce the anticipated and needed change. The same hope and subsequent disappointment happened with respect to sexual misconduct allegations against various political leaders in the late 1990s. The #MeToo movement, however, is a watershed moment. One only has to look at how many powerful executives and other individuals in significant leadership roles have lost—and are continuing to lose—their positions to appreciate that the #MeToo movement has had, and will continue to have, a long-lasting impact.

The #MeToo movement is helping to underscore the importance of people treating one another with respect and dignity. This is critical. The movement is also changing the kinds of conversations that people can and should have on a day-to-day basis with one another in the workplace. In most respects, this is a positive development. Yet, some people in corporate America are lamenting that the movement has so sterilized the working environment that we have to walk on eggshells with respect to our workplace conversations. They say that this is especially so when it comes to having a sense of humor.

For example, in the late 1970s and early 1980s, one of the jokes heard in many offices, and especially during collective bargaining negotiations, was the one about the very first labor contract negotiation in the history of the world—you know, the one between God and Moses:

*God was obviously management, and Moses represented the people. It was a blistering, hard-fought negotiation. God used all of the management tricks in the book—thunder, lightning, and burning bushes. Moses threatened work slowdowns and even to take the people out on strike if he did not get his way. Finally, after 40 long days and nights, Moses descended from Mt. Sinai. He was parched and exhausted, and he was carrying two tablets with him. He eventually gathered everyone before him, and he said,*

*"People, I have good news, and I have bad news. The good news: I got him down to ten. The bad news: Adultery is still in there; but it's not retroactive."*

Years ago, many people considered that joke amusing and harmless. Today, several people might also laugh at the joke, however, one should think twice before telling it in the workplace. People's attitudes have changed. Some people might take offense at the story. Some might feel that it is religiously harassing because it ridicules God, Moses, and the Ten Commandments. Others might feel that it is sexually harassing because it seems to revere adultery and casual sex.

Telling the foregoing joke alone would not constitute unlawful harassment because the conduct would not be so severe or pervasive to alter the conditions of employment and create an objectively hostile or abusive working environment. Indeed, employers generally are not held liable for isolated off-color comments, incidents, teasing, and other banter. But why go there? Why make colleagues in the workplace feel uncomfortable? Why run the risk that the joke, considered with other, more severe conduct that has permeated the workplace, might be part of an unnecessary and expensive lawsuit?

Of course, this is not to say that we should abandon our senses of humor. On the contrary, we shouldn't. We, however, should think about the impact that our stories,



jokes, and comments might have on others before sharing them.

When I have made this point at workshops and trainings, someone grumbles that banning jokes at work is taking the joy out of the workplace. I am not suggesting, however, that we should have antiseptic working environments. Places of employment can and should still be places of enjoyment where employees can share amusing stories and jokes. They just need to be appropriate.

Sometimes a workshop attendee will say something like, "The best jokes are dirty jokes. You're taking away our fun." I reinforce that I am not saying that we should not have fun or that we cannot tell jokes. Indeed, I maintain that, even though the U.S. Congress has hundreds of politicians, there is nothing in the Constitution or the law that prohibits telling jokes about them. Politicians are fair game, and there is plenty of fodder. Here is but one example:

*One day back in the early 1960s, President Kennedy, Vice President Johnson, and the first Mayor Daley were on a boat together in Chicago way out on Lake Michigan. Suddenly, a terrible storm erupted, and a powerful lightning bolt punched a huge hole in the boat. It was clear that the boat could only hold one of the three politicians. Two would have to jump overboard, and they probably would perish.*

*President Kennedy said, "I obviously should be the one to survive. I'm the President of the United States and the most important person in the world. I also have great social programs that I must see enacted."*

*Vice President Johnson snarled, "That's ridiculous. If it weren't for me, Mr. President, you wouldn't have carried Texas. Besides, I'm the one who engineers your programs through Congress. I should get to stay on the boat."*

*Mayor Daley interjected, "Gentlemen, gentlemen! I'm shocked at what I'm hearing. We are statesmen; we are members of the Democratic Party. We shouldn't be bickering about this issue. We should hold an election."*

*And they did. Daley won 7-2.*

Moreover, there are many other amusing jokes and stories about other groups and topics that do not run the risk of offending someone based on factors such as sex, race, religion, age, ability, or other protected categories.

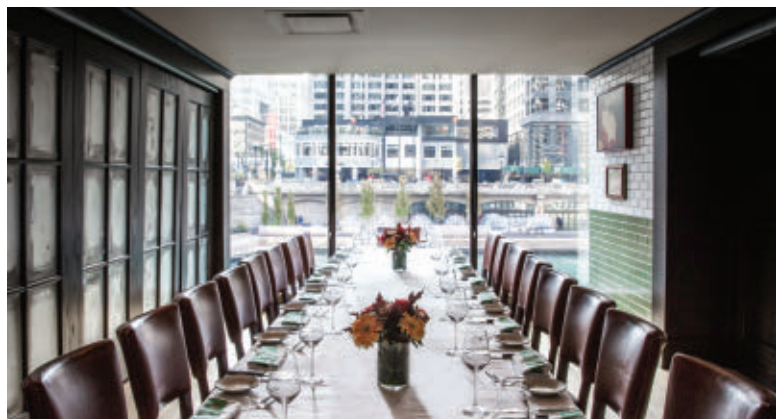
The bottom line is that we need to be appropriate. We need to be careful that our statements and actions are neither misconstrued nor offensive. This includes being more judicious in our day-to-day conversations and the stories and jokes we share in the workplace. While discretion is the better part of valor, we need not go

overboard. Lightheartedness and wit are critical aspects of our humanity and can make the work environment enjoyable and even productive. To abandon those attributes would be a shame. **cf**

---

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

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



**Smith & Wollensky.**  
— America's Steakhouse —

## PRIVATE EVENTS

Boston . Chicago  
Columbus . Las Vegas  
London . Miami Beach  
Wellesley, MA

For all private event inquiries, contact:  
Rochelle Bernstein  
[RBernstein@swrg.com](mailto:RBernstein@swrg.com) . 702.379.1470

# Website Accessibility Issues and the ADA

**Q: We are working to update our association's website. I've heard that we need to make it accessible under the ADA. Is that true?**

**A:** The Americans With Disabilities Act ("ADA") was enacted, among other things, to prohibit discrimination against people with disabilities by requiring "places of public accommodation" to be accessible and available. A "place of public accommodation" is broadly defined as a facility operated by a private entity whose operations affect commerce. Most associations are familiar with the ADA's requirements to make reasonable accommodations to provide physical access, such as ramps and wider aisles, and "auxiliary aids," such as sign-language interpreters and Braille copies of handout materials. However, there are many open questions surrounding the applicability of the ADA's requirements to websites. The key issues are whether a website is a "place of public accommodation" requiring accessibility, and, if it is, what standards should be used to evaluate a website's accessibility.

Because it was enacted before the advent of websites and before the internet was widely used by the public, the ADA does not explicitly address website accessibility issues, and the federal government has not issued

any formal rules or regulations interpreting the ADA's application to websites. As such, there is no clear guidance available to associations and other businesses to help determine whether the ADA applies to their websites or to instruct them on how to comply with the ADA. Nevertheless, the government issued a statement in September 2018 that its position has been consistent for twenty years that the ADA applies to the websites of "places of public accommodation." And yet, despite requests for guidance, the government has yet to provide any direction as to what that means or what is required for a website to comply with the ADA.


Not surprisingly, there has been a rise in private litigation brought by individuals with disabilities alleging that certain websites violate the "public accommodation" provisions of the ADA. The plaintiffs in those cases are often blind or visually impaired consumers who rely on screen reader software to navigate websites. Depending on how websites are constructed, they may not be compatible with screen reader software and, therefore, may not be accessible to the blind and visually impaired.

In the absence of any regulatory guidance, courts have been left to decide the wide range of issues related to website accessibility and the ADA. The decisions to date have been inconsistent. Some courts have held that for the ADA to apply to a website, a plaintiff must show a connection between the website and the busi-

ness's brick-and-mortar store or location. Other courts, however, have held that a business's website must comply with the place of public accommodation provisions of the ADA regardless of whether it maintains a physical location.

To the extent an association's website is considered a place of public accommodation, the next question is what standard(s) should be applied in determining whether the website meets the accessibility requirements of the ADA. Although the ADA does not require an association's website to be equally accessible for all services, associations (and other businesses) are required to provide reasonable accommodations when requested. Some courts have held that websites should meet the voluntary standards set forth in the Web Content Accessibility Guidelines ("WCAG") 2.0 Level AA criteria [<https://www.w3.org/TR/WCAG20/>] developed by the World Wide Web Consortium through its Web Accessibility Initiative. The WCAG are international voluntary standards intended to provide guidance on how to implement accessibility to Web content for people with disabilities. While some courts have referenced WCAG, others have not. Further clouding the issue, the Justice Department has indicated that organizations may provide reasonable accommodations to people with disabilities by means other than conformance with WCAG 2.0 Level AA. And yet, because the federal government has so far failed to identify

what other reasonable accommodations may satisfy the ADA's requirements, the courts are left to decide what constitutes accessibility for a website, and businesses are left to guess how best to proceed.

Unfortunately, there are numerous unanswered questions and potential legal challenges involving website accessibility. Associations are encouraged to (i) familiarize themselves with those issues; (ii) review the ADA's requirements and the technical standards for website accessibility; and (iii) seek the advice of legal counsel to answer any questions. 

---

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





THEY SAY IT'S JUST ANOTHER MEETING.  
WE SAY, YOU'LL NEVER WANT IT TO END.



You're not looking for another breakout—you want a breakthrough. In a city where unconventional places meet state-of-the-art convention space, success can be found everywhere you turn. So come, and let Phoenix surprise you. **Explore more at [VisitPhoenix.com/meetings](https://VisitPhoenix.com/meetings).**

The logo for VisitPhoenix, featuring a stylized sun or wave icon above the text 'VISITPHOENIX'.

# Crafting Your Personal Brand

By **Jennifer Curtet**

Whoever thought we would need to think about our personal brand in the workplace? In the world of tweets that will never die, digital footprints that will follow you forever, and personal opinions and records available at a quick click, the online world is now greatly influencing what we do in the business world. While we have always understood the power of personal and professional reputation, there was a time when we could keep our professional life clearly divided from our personal one, which is not quite as easy to do today. With the advent of the internet, suddenly these two worlds are colliding, for better or worse. Furthermore, the online tools can greatly influence how people treat, judge, assess, and even trust you, with their business.

We often think of personal branding as being a necessity for those associated with an online presence or digital business. However, in today's rapidly changing and ever-evolving business world, the footprint you leave online, and also in the hallways, boardroom, and email threads, is not only important but can have a career-altering impact on your trajectory. For women in particular, a strong personal brand can open the door to new business and career opportunities, which also allows you to build a strong network of influential allies.

As female leaders climb the corporate ladder, they often find themselves among a few women in upper-management positions. Crafting, understanding and using a personal brand effectively provides an opportunity for you to not only strategically plan your ascension in your career development, but also gain support by connecting with other female leaders. By sharing your own experience through personal branding, you can connect with other professionals who can play a vital role in your success.

Your brand affects how people perceive you professionally. Creating and projecting a strong personal brand can give you greater influence when building more productive and high-performing teams, growing more effective relationships with clients, and improving customer service experiences. One way to achieve your career goals and make sure that your potential isn't overlooked is to develop your own recognizable and unique personal brand.

Whether you're just starting your career or looking to advance, here are a few important things for women in business to keep in mind when building a personal brand:

## **Start with your key strengths.**

When you look at your noteworthy accomplishments and compliments, what is the strong thread that

weaves through your biography? When you are introduced, evaluated and admired, what are the traits that are consistent and recurring? Assess everything from your style, body language and tone of voice, to how you communicate on email or by phone. When you think of Oprah Winfrey, you understand that she represents depth, stability, wisdom, and intelligence, which is a personal brand that has been expertly crafted over the years. We see this brand solidified through an authentic and consistent expression in her business, speeches, productions, and publications. Conversely, what are the misperceptions that need to be corrected or amended about you, which may be blocking your progress? Understanding how to amplify your key strengths is how you begin to increase your influence and reach.

## **Identify what sets you apart.**

Focus on the things that make you different and concentrate on the positives on a personal and professional level. Consider the first impression that you make with others, the way you react in everyday situations, how you deal with stressful occurrences, and even your creativity and the way you think and process information. How do you see the world? What's your unique super power? Where do you divert and go against the grain? The very skills that seems strange and different may be the exact strengths that propel you and set you apart from the pack. Think Steve Jobs; he was a socially awkward genius that "punched a hole in the sky" and brought us some of the most unique and groundbreaking products that the world has ever seen. Some of the most recognizable figures in business were often marching to the beat of their own drum and slightly off-center. Own your quirks—they just may be your golden ticket.



A photograph of three people (two men and one woman) sitting at a table in a bar or restaurant, laughing and holding drinks. The background shows shelves with bottles and a warm, ambient light.

## BREAKOUT SESSIONS HERE INCLUDE BREAKING OUT THE BOURBON

*Kentucky*  
UNBRIDLED SPIRIT

There's a whole new meeting experience waiting for you in downtown Louisville. From our recently unveiled convention center to seven urban bourbon distilleries within walking distance, it's easy to see why Experient named Louisville one of the "3 Hottest Event Destinations in North America Right Now."

Because when you meet in Bourbon City, you get so much more than a meeting.

Learn more at [GoToLouisville.com/Meet](https://GoToLouisville.com/Meet)




@GoToLouisville

“Your brand affects how people perceive you professionally. Creating and projecting a strong personal brand can give you greater influence when building more productive and high-performing teams, growing more effective relationships with clients, and improving customer service experiences.”

#### Understand the players.

It is essential to know who the movers and shakers in your business or industry are. Who makes the decisions? Who influences the trajectory of the business? Who leads and inspires? Who disrupts and creates growth? These are the people who should see you as an indelible asset to their process, which means that you must expose, extend and sell your skills to them expertly. Regardless of your role or the stage of your career, the way you project yourself to these key players will go a long way to getting you noticed for all the right things—your ability. As Sheryl Sandberg, the COO of Facebook says, “Women need to take their seat at the table.” Show up. Be prepared. Come with new, compelling, and stimulating content to share. Ask questions. Dig deeper. Sandberg says that women should lean in and use their assertive voice, keep their foot on the pedal, and understand who their potential partners are. There are some common issues that women may face in their careers and for those looking to move forward, it's necessary to find allies who will help create the right opportunities to ensure your talent is noticed.

The concept of personal branding—succinctly communicating the value others will experience by working with you—is as important as any degree, leadership course, or certification and should be prioritized in your career development. Crafting your personal brand and articulating your value to others are not “necessary evils,” but the keys to your professional development. It is important to remember that there are some fantastic benefits to personal branding that will catapult you into an exciting, fulfilling and compelling career space. It is about who you are and how you resonate with yourself. It's about the way you make others feel. In a world saturated by companies and individuals advertising their uniqueness, it takes a well-defined personal brand to really stand out. Knowing your strengths, owning your quirks and aligning with the key players are the steps that will get your super powers recognized and allow you to be the very best version of your professional self. 

Jennifer Curtet is a professional speaker, author and coach. She can be reached at [jennifercurtet@yahoo.com](mailto:jennifercurtet@yahoo.com).

## The 2018-2019 Compensation and Benefits Survey is Now Available!

- Contains data gathered from 107 organizations
- 84 job roles listed
- Attract and retain employees by offering competitive salaries
- Choose the best move for your career with salary information on individual job roles

Order today at [AssociationForum.org](http://AssociationForum.org)





# We are DelCorians.

Born curious, we never stop learning. And we're inspired by mission-driven organizations. That's why we partner exclusively with associations and nonprofits to deliver technology consulting and network management that exceed expectations.

For award-winning IT strategy and support powered by human intelligence and a commitment to excellence, count on the DelCorians.

delcor®

Meet the DelCorians  
at [delcor.com/team](http://delcor.com/team)



delcor®

# My Sutherland Scholarship Year

By **Felicia Owens**

I know what you're thinking—my family still asks, too: What's an archivist? Archivists are the professionals who assess, collect, organize, preserve, and provide access to important and enduring records. At the Society of American Archivists (SAA), our small but mighty staff of twelve supports 6,200 members in advocating for archives and archivists. Our members archive everything from historical records to corporate documents to celebrity memorabilia to local, state, and federal records. (And, yes, there are even archivists preserving the President's tweets.)



Felicia Owens, governance program manager for the Society of American Archivists, was the 2018-19 recipient of the Bree Anne Sutherland Scholarship. Named in memoriam for Association Forum's former director of learning, the Bree Anne Sutherland Scholarship is awarded annually to a young professional and provides one year of unlimited access to Association Forum education.

As the governance program manager, I provide support to SAA's sections (shared interest groups), committees, and Council, as well as the Foundation Board. One month into the job, I found myself frantically taking minutes at my first Council meeting, misspelling names and confusing acronyms. Three years later, not only has my minutes-taking improved exponentially, but I've come to appreciate being "in the room where it happens" with leadership, getting a bird's-eye view of SAA and the future of the archives profession.

Even as I was learning about archivists, I was also getting acquainted with the association management profession. I stumbled into association management by happy accident, as most of us do, and my limited knowledge of the profession was filtered through my SAA lens. This time last year, I nervously clicked the submit button to apply for Association Forum's Bree Anne Sutherland Scholarship, hoping for the opportunity to get a broader perspective on a career in associations. Imagine my surprise a month later when I was notified that I'd received the scholarship. I was so eager to embark on this concentrated year of study!

I was surprised (and delighted) to discover that Association 101, the kickoff to my Sutherland year, focused primarily on governance. Although I was familiar with terms like fiduciary responsibility, I quickly realized there was still much I didn't know, so many "dazzling successes and fantastic failures" to learn from, as instructor Dr. Philip Lesser would say. The other courses in the Association Management Essentials series also proved to be absolute gems, serving to fill in the gaps on so many aspects of our profession.

- Association Law, as promised, gave me just enough to appreciate (rather than fear) legal concerns and to ensure that my mental alarm would go off when legal counsel needs to be sought.

- Membership 360 put me on the other side of the table to consider how members experience the work I do every day.
- Your Leadership Potential allowed me to discover my own "influence potential" and strategies for communicating effectively with others on both a large and small scale (including negotiating with my boyfriend!).
- And, of course, Governance Essentials was like a "self-care" session for me and my fellow governance folks. (No hydrating facial masks, unfortunately!) I was heartened to find solace with colleagues who had similar struggles and inspired by their creativity and dedication to solve issues like orienting new board members and developing productive agendas.

I look forward to earning the Association Management Essentials certificate soon with the final course, Finance for the Non-Finance Professional.

Though outside the Essentials certificate, The Volunteer Relationship: Engagement and Support course served as a deep dive into leadership from both staff and members' perspectives and provided effective communication strategies to maximize volunteers' limited time.

Attending all of the Association Forum signature events—Forum Forward, Honors Gala, Holiday Showcase, SmartTech, the Welcoming Environment Summit and the Women's Executive Forum—in a single year provided strong examples of diverse learning experiences. Through education sessions, networking breaks, action planning, keynote addresses, and a whirlwind visit to the exhibit hall, I learned that no matter the size of our memberships, we all have similar struggles, but we also have a wealth of solutions to share.

Thanks to the Sutherland Scholarship, I appreciate leadership development as a lifelong endeavor and something I will always be passionate about pursuing. Having attended six signature events, absorbed seven education courses, and watched 16



webinars, I fully believe that all member engagement is ultimately leadership development. The 50+ hours of professional development paid immediate dividends in renewed energy and inspiration. Whether it was an hour or a full day, I left every session brimming with new ideas to share and implement as well as a clear action plan to keep me motivated once I returned to the office. I find my voice strengthened, a new confidence to speak up during a session—both to ask a question or offer advice—and to take risks with new initiatives.

Providing a year of study, opportunities, and professional development to a young professional is such a meaningful way to honor the memory of Bree Anne Sutherland, AF's former director of learning. I am grateful to Association Forum for selecting me to be part of this legacy. I will certainly hold the lessons, best practices, and new connections dear throughout my career.

I encourage new professionals to apply for the Sutherland Scholarship (and to reapply again next year, if you're not selected). Every hour you invest with this scholarship will be invaluable for accelerating your knowledge of association management and understanding your motivations for embracing this profession.

Thank you to the many instructors, presenters, and fellow Association Forum members for sharing their vast wisdom, including my mentor, immediate past-president Rob Paterkiewicz. Most importantly, thank you to the Association Forum staff: Michelle, Melissa, Moe, Shawn, Mena, Phyllis, Mike, Regina, Nicole, Katie, Matthew, Dan, Adam, and (former staff) Tina. Your warmth and guidance was such a wonderful welcome to the Association Forum community. I look forward to seeing you at Association Forum events for many years to come!

## Discover Opportunities. Reveal Possibilities.

### AMC Consulting Services Governance Offerings:

- Governance Essentials™
- Governance assessments
- High-Performing Boards™
- Leadership Practices Inventory® 360
- Strategic planning
- Executive Leadership Development & Advising
- Board and Staff Development



Learn more at  
[www.connect2amc.com/consulting](http://www.connect2amc.com/consulting)



# Circuit: 20 For 2019

## SmithBucklin presents a look at the trends that are shaping the association industry

SmithBucklin has released the 2019 edition of *Circuit*, their annual publication highlighting 20 trends, issues and developments in the association industry. This year, in honor of their 70th anniversary as a company, SmithBucklin asked 70 luminaries from all walks of life the following question: “Why are associations critically important?” Below, FORUM has selected a few key takeaways and quotes to share. For the full report, visit [www.smithbucklin.com/circuit2019](http://www.smithbucklin.com/circuit2019).

### The Quotes:

*“Associations give their members three huge advantages: greater strength, more information and deeper relationships. That’s why associations have existed since ancient Greece and why they’re more valuable than ever in today’s fast-changing world.”*  
– Geoffrey Colvin, senior editor at large, Fortune Magazine

*“Associations support industries and professions through innovation, advocacy, professional development opportunities, and more, all while driving economies—both locally and globally—and contributing to society’s greater good. That’s why I’m proud Chicago is a magnet for association headquarters and destination for their events.”*  
– Rahm Emanuel, Mayor, Chicago

*“In an age of information bombardment, coming together with shared intention is a necessity. It allows us to distill complex issues so that we can get things done and make a real difference. Associations bring out the best in all of us, ensuring we are driving our industries and society forward.”*  
– Sherrif Karamat, president and CEO, Professional Convention Management Association

*“One of the most important roles of associations is recognizing contributors. So many volunteers keep the wheels of commerce and charity rolling. Associations celebrate their contributions. Where else would non-celebrity, ordinary mortals get standing ovations?”*  
– Paula Goedert, partner, Barnes & Thornburg LLP

*“It’s no fallacy that some of the most significant institutions of social and cultural advancement were built by associations. We simply accomplish more when we work together. By the way, real friendships are a pleasant side effect of joining professional groups.”*  
– Welz Kauffman, president & CEO, Ravinia Festival Association

### The Excerpts:

#### The Benefits of Diversity and Inclusion

By taking the lead on diversity and inclusion, associations can help transform their own industries and professions by inspiring members to embrace diversity in their workplaces. A 2018 study from McKinsey and Co. found that companies with more gender diversity on their executive teams were 21 percent more likely to experience above-average profitability, while those with more ethnic and cultural diversity were 33 percent more likely to outperform expectations. “Associations have an absolute responsibility to help their industry or profession address diversity and inclusion,” says Jim Zaniello, president and CEO of Vetted Solutions. “It’s an important role that associations can and should play to help their industries and professions advance. I’m not sure anyone else is better positioned to lead the charge.”

#### The Power of Outrageous Fun

Sometimes, the outrageous fun can be a cultural deep-dive. The Research Chefs Association (RCA)—the leading professional community for food research and development—offered its attendees an unforgettable education experience that not only furthered RCA’s mission but also taught attendees about Savannah, Ga., the event’s location. Participants started their day with a tour of a local fishery. There they learned the important and historical role shrimp has played on local cuisines and what research is currently being conducted to ensure its continued vitality in the region. The sustainability talk continued over lunch, during which a prominent chef in the organic farming and sustainability movement led the conversation. Then, the group journeyed out on a shrimping boat to experience the sights and sounds first hand. They even had the opportunity to pull up a live catch,





# PEOPLE PLACES PARTNERSHIPS

## THEY COME TOGETHER HERE

IN VANCOUVER, WE ALL WORK TOGETHER TO  
MAKE SURE YOUR EVENT RUNS SEAMLESSLY

From the hotels, to the venues, to our restaurants, we are more than suppliers. We are a community that is committed to giving you and your clients the best experience possible. To find out how we can help you with your next meeting or event contact:

Rachael Riggs, CMP, Manager, Meeting & Convention Sales, Chicago & Midwest  
at [rriggs@tourismvancouver.com](mailto:rriggs@tourismvancouver.com). Or visit [tourismvancouver.com](http://tourismvancouver.com)

**VAN  
COU  
VER**



“Associations support industries and professions through innovation, advocacy, professional development opportunities, and more, all while driving economies—both locally and globally—and contributing to society’s greater good. That’s why I’m proud Chicago is a magnet for association headquarters and destination for their events.”

finding not only shrimp but also other interesting fish local to the area. It was an experience that participants will never forget and likely wouldn’t get anywhere else—except perhaps at the next RCA conference.

#### **A Niche Focus**

Niche marketing—a strategy that targets a specific, unique market segment with a highly relevant offer—effectively drives results for for-profit businesses, and associations are well positioned to help connect companies with hyper-targeted audiences. Associations are skilled at identifying and serving specific membership niches—a strength sponsors and advertisers can capitalize on.

#### **Financial Health Check**

A financially healthy association is building and executing long-term, strategic financial goals. Therefore, a healthy association should be budgeting and cash-flow forecasting on a rolling three-year cycle. This kind of long-term planning should be done when budgeting for the upcoming fiscal year. Ultimately, it provides additional strategic options. For example, if an association projects that a cash surplus will be achieved for the following year, the board may decide to pursue future-focused investments to help the association in the long run. Conversely, if a long-term forecast shows a cash deficit for the coming year, the board can determine if it is time to liquidate more assets.

#### **Zoom in on Gen Z**

Gen Z-ers want variety in all realms of life, including the workforce. SHRM notes that 75 percent would be interested in a situation where they could have multiple roles within one place of employment. What could that mean for associations? Be prepared for these future members to want to be involved in multiple facets of the association. Perhaps junior boards should be considered as an option to engage Gen Z-ers and give them an opportunity to impact many different areas.

#### **Recruitment Tips from Higher Education**

To achieve a more direct connection with prospects, schools such as Presbyterian College in Clinton, South Carolina, are reaching out to students with tailored notes via text messages. The personalized messages ask questions that directly pertain to the student’s background and interests. Presbyterian reports the program vastly improved communications with recruits who were hard to reach otherwise, as 74 percent of applicants opted into receiving texts.

Associations should be creative but respectful with their delivery methods. Consider your membership demographics to ensure whatever you do won’t be considered invasive. (Baby Boomers might not be fans of unsolicited text messages.)

#### **Content Diversification**

Members of the Vacation Rental Management Association (VRMA) made it clear that they wanted content more frequently than the association’s quarterly print publication, *Arrival*, could offer. VRMA needed to change its content strategy to keep members up to date on the rapid changes in the industry, and used the opportunity to diversify its offerings, too. The association increased the frequency of *Arrival* from four to six times per year and launched a complementary online content hub where it frequently shares breaking news, podcasts, event information, member profiles, and more.





WITH VORACIOUS &  
WELL-FED CURIOSITY.  
**IT'S HOW SEATTLE MEETS.**

University of Washington

Seattle is one of the most literate cities in the world and home to some of the country's top academic institutions. Learn more about placing your meeting in Seattle where curiosity and inspiration are contagious at [visitseattle.org/meetings](http://visitseattle.org/meetings).

VISIT  
**seattle**



# Healthy Options

By Lisa J. Mikita, CMP, CAE, HMCC





for

# Meetings

N

ew Year's Resolutions of losing weight and getting "healthy" abound. Meeting attendees are always asking for healthier options when it comes to food. And even if they're not asking, there is increasing evidence linking healthy food choices to better learning and retention of information, which is reason enough to move in the direction of healthier meetings.



So, what can you do?

Offering healthier food and beverage options is an obvious choice. Instead of cookies, serve nuts. Instead of ranch dip with vegetables, choose the healthier option of hummus. If the chef is willing to work with you, ask for his or her suggestion for a creative way to offer healthier options. In some cases, you'll find a chef eager to do this for clients, if only they'd ask. And remember, "organic" doesn't always mean "healthier."

Does the hotel have a spa that has healthier menus than the standard banquet menus? See if they'll work with you using the spa menu instead. With so many people on low carb diets, making menu selections where attendees don't have to use breads is an easy fix.

Many organizations are also doing what they can to get people moving. The Association for Public Policy Analysis and Management in Washington, DC held High Intensity Interval Training for the first time in 2018, offering the program in the early mornings to get people ready for the day. While only 20 attendees participated (about 1 percent of their attendance) the buzz surrounding it was enough that they plan to continue it in the future.

Another popular option is a Fun Run/Walk. Early one morning a number of your attendees and exhibitors gather for a 5k walk or run. Note that many locations require city permits for the run, so you'll want to make sure you are in compliance, and it is wise to have participants sign a waiver releasing the organization from responsibility for injury, etc. According to the Harvard Health Blog, "...in a study done at the University of British Columbia, researchers found that regular aerobic exercise, the kind that gets your heart and your sweat glands pumping, appears to boost the size of the hippocampus, the brain area involved in verbal memory and learning." So not only will those who participate benefit in fitness, they are likely to learn better, too.

Do your hotels offer complimentary access to their fitness centers? If not, add that as a concession in your hotel contracts. While not a formal activity, this will be attractive to your every day runners and exercisers. And perhaps some who don't normally use the fitness area will do so if it's included and promoted well. However, if your event is heavily scheduled from early morning into the

evening with education, activities and functions, you may want to re-think the pace. Not only will "white space" within the meeting allow for some of those fitness activities, it also promotes reflection on what was learned that day which helps lock it in for application and use in participants' own workplaces.

Healthy activities do not need to be high impact. Offering yoga in the early morning or at lunch helps everyone clear their minds and work on their flexibility which will come in handy if the location of your meeting is spread out and people have lots of walking to do just to get to their sessions. Yoga, tai chi and meditation are low-impact options that all help with focus and preparation for learning and don't require much space or equipment. And all can be done while seated, if your folks are less active, have accessibility challenges, or just don't want to work up a sweat. The hotel health club may be able to provide an instructor, or suggest a resource for finding a local provider, and most are familiar with audiences of all types and skill levels, as well as adjusting their instruction to a seated group. A potential bonus—for a modest additional fee, the instructor may be willing to hold a casual mini-session on a related topic, depending on the individual's expertise.

During breaks, offer an opportunity for attendees to stretch. This can be a standing-room-only gathering that will help limber up attendees who may have been sitting for too long. There are companies and individuals who offer this service, either with a live instructor in the room to lead a group stretch-and-move activity, or videos played either for the full group or in a nook where small groups can stop by for a few minutes as they pass by.

The American Public Human Services Association has a dedicated "Wellness Lounge" where massages are offered throughout the day. The Association of Public-Safety Communications Officials International rotates yoga, Zumba, and bootcamp during their annual meetings, attracting about 5 percent of their attendance. In addition, they always make sure to offer an educational session or two about healthy eating and living.

You want to provide healthier options, but your food and beverage budget hasn't caught up to the times? Ideas that may help ease into it include:

- Substitute: For example, ask for brown rice as a



---

“Meeting attendees are always asking for healthier options when it comes to food. And even if they’re not asking, there is increasing evidence linking healthy food choices to better learning and retention of information, which is reason enough to move in the direction of healthier meetings.”

---

side instead of the potatoes listed on the menu, or ask for a second vegetable, or the salad, in place of the starch.

- Eliminate: Maybe soup (or even salad if there are veggies in the main meal) isn’t necessary – ask for it to be eliminated and the meal price dropped accordingly.
- Defer: If dessert is included in the banquet meal price, ask for it to instead be served with the afternoon break (and of course ask if fruit can be substituted, or perhaps there can be a mix of fruit and sweets).
- Reduce: Request smaller portions, especially if you do offer high-calorie items like cookies and muffins. No one needs a giant cookie or a muffin they can’t even pick up with one hand, and we’ve all see it many times. So much waste is created, because most folks don’t really want that much anyway.


If your budget doesn’t give you the flexibility for new expenses in this area, focus on what you have to work with.

- One suggestion is to acknowledge that meetings often entail a lot of walking, so have a contest for who hits the most steps—per day and throughout the event. Most folks have or can easily download a step-counter app on their device if they wish to participate, and some meeting apps offer gamification features that already include this. Prizes can be a tangible item like a personal fitness device, or a gift card, a freebie to next year’s event or other association item (book, job posting, educational event credit, etc.), all relatively low-cost.
- Also, you can provide a list of nearby fitness options such as walking and running routes, suggest classes attendees can take on their own at local facilities, a reminder sheet with tips for making healthier choices when traveling and attending meetings, and so on.
- If your event features an exhibit area or sponsoring companies, perhaps one or more of them will pitch in to support costs toward a healthy break or a wellness-related activity, in exchange

for being credited with signage or appropriate logo placement or a mention from the podium.

- Another possibility, if the organization’s leadership is on board with promoting health and wellness at the meeting, is to have the food or activity “sponsored” by the board of directors or a particular committee. While the funding would still (likely) come from the organization’s coffers, the added emphasis should garner more participation, and those leaders can become ambassadors to encourage it. The involvement of leadership may in turn build momentum and make it easier to add funding in future budgets.

Those executing events in the scientific and medical realm may need to use caution in choosing materials to share, speakers to select and activities to offer, as members may expect evidence-based interventions only, consistent with how the organization itself manages and shares information. In this case, be sure there are solid resources, preferably including peer-reviewed journal articles, to back up any assertions or claims made before promoting your great idea.

Thank you to the following individuals who shared their thoughts and activities for this article: Joyce L. Paschall, CAE, CMP-HC, CMM; Donna Jarvis Miller, CMP, CEM, American Public Human Services Association; Patricia Giannini Henry CAE, Association of Public-Safety Communications Officials International; Tara Sheehan, Association for Public Policy Analysis and Management. 

---

**Lisa Mikita, CMP, CAE, HMCC** is an experienced meetings and association manager. She can be reached at [lisa.mikita@att.net](mailto:lisa.mikita@att.net).

# Registration for Forum Forward 2019 is **Now Open!**

ACCELERATE YOUR ASSOCIATION™

FORUM  
FWD™



DRIVEN  
BY



June 19, 2019 | **Venue SIX10**

610 S. Michigan Ave, Chicago IL, 60605



*Stay ahead of the trends, technology and issues impacting your profession by joining us for a full day exploration of new concepts and strategies.*

**Advance your career.**

**Advance your organization.**

**Advance your profession at Forum Forward 2019!**

**[www.ForumForward.org](http://www.ForumForward.org)**



Don't Miss the Keynote Address:

## Attention Pays™: Drive Profitability, Productivity, and Accountability in your Association



**Neen James**  
Speaker, Author,  
Leadership Expert

Join speaker, author, and sassy little Aussie, Neen James, and discover what makes attention valuable and why paying attention in very specific ways drives profitability, productivity, and accountability. To get the results you want, you need to get attention. But most people don't know how to get it and keep it. Neen has designed a methodology for Intentional Attention that helps association leaders and organizations be more deliberate about the choices we make and the actions we take.

You'll learn:

- The three types of attention, Personal, Professional and Global and how to master each
- Strategies to design work and personal environments to accelerate optimal attention and focus
- A framework to get your team aligned, focused and executing faster than ever

Register today at [www.forumforward.org](http://www.forumforward.org). Don't wait – Forum Forward sold out last year.

---

New this year: A full Association 101 session will be co-located at Forum Forward. Send your team!


*An orientation for association professionals, Association 101 is the premier preparatory course in association management. Association 101 is designed to provide a solid foundation of knowledge and appreciation for the unique environment, culture and dynamics of associations.*

Register today to learn from some of the best and brightest in our community to accelerate your association.

# The Business of Association Education

By **Debra Zabloudil, FACHE**





In the world of association education, many competing demands exist. Members want products and services that meet the needs of their current professional challenges, and for you to anticipate what they will need next. The business climate in which they operate is shifting under their feet and everyone is just a little bit different, making your job just that much more challenging.

Consequently, offering educational programs, products and services that meet all/some/most/a bit of your members' needs can be a daunting task. What often happens is the association tries anything and everything hoping that if they throw it at the wall, it will stick (image of spaghetti thrown at the wall). Often times, this results in weak programs and attendance, that result in poor financials overall.

The dirty little secret of association education is that it is a business. Yes, a business. Done right, the education enterprise can operate as a revenue-generating entity for the organization. But more often times it does not.

While it is important, and even critical, to consider adult learning styles, developing programming of the highest quality possible, using a variety of learning modalities and more, there must always be a business consideration for what happens in the education arena.

There are many dos and don'ts to running a profitable, member-driven quality education enterprise. If we put our business hats on for a moment, let's consider those essential conversations that need to be had, and decisions that need to be made. Do not be afraid to tackle big, strategic decisions about your education, with the help and guidance of a well-informed subset of the membership. That group may be your board of directors; it may be an education committee or some other entity. If you are a more volunteer-driven organization (rather than staff-driven, making most decisions as a management team) you need to involve the members in the bigger, more strategic decisions around education. Why? Because they will affect your pricing, your marketing, the attendees you are trying to serve and more.

Consider including the following 8 principles into your conversations around your education portfolio:

## 1) We must be deliberate.

There are no absolutes that can be provided to you in terms of how every association should run its education enterprise. Every culture is different, revenue is derived differently across organizations, and some associations have a greater appetite for innovation and risk. To be sure, though, the one absolute

is that you must be deliberate. For example, if it is decided that the association education should be a loss leader for membership recruitment and retention, focus on how to bring in repeat customers and a larger number of unique participants. You might decide some programming should be offered at no fee to begin to cultivate interest from nonmembers, or even develop programs that appeal to a sector of your industry not currently being served by another organization.

On the flip side, your association may have made the decision that education needs to be able to support itself. In that case, you should determine all costs associated with your programming (direct and indirect), what pricing works with the associated costs (and will be accepted by your members and other constituents) and how many individuals you need per program to present a positive bottom line. The type of strategy matters, of course, but more important is that you have a strategy for education. You cannot run the business of education without one. Not being deliberate in direction can lead to flawed decision-making affecting expense and lost revenue opportunities.

This leads us to the biggest question you may need to gain clarity on around your education:

## 2) Should this association's education be a revenue generator, or a member benefit?

Surprisingly, more than a few associations have not yet tackled this question with any certainty at all. If you are not clear on whether your programming needs to show a positive bottom line, how will you plan your portfolio? How will you know when you are successful? What this means is that everyone needs to be clear on where the organization stands, not just a few internal operators. How can the association run its business well if the staff is operating under the directive of the enterprise running in a profitable manner, yet the education committee is not? In most cases, it is because this has not been discussed with our key volunteers.

“While it is important, and even critical, to consider adult learning styles, developing programming of the highest quality possible, using a variety of learning modalities and more, there must always be a business consideration for what happens in the education arena.”

If you are in a “gray area” with respect to this question, here are a few initial recommended steps:

- Begin conversations internally around education profitability. Review your financials for the past few years, and truly understand how successfully the enterprise has operated. You don't want to set expectations that you can become a profit-driven enterprise overnight, if the past five years have shown a negative bottom line. But talk about the culture of the organization, how education is viewed in the organization and if it can become a profit-driven arm of the association. In most cases, it can.
- Once the management team is in sync on this philosophy, this may need to be presented to the board and discussed. This is largely dependent on the culture of your organization, but if there are budget implications in your decision (and there most certainly are in this case) you should have this conversation with the board. This is both philosophical and practical. Philosophical? Yes. The board needs to talk through and socialize how it views education in the organization and whether it is a benefit of membership or an additional revenue stream for the organization. Remember, too, it does not need to be one extreme or the other, but how will you potentially offer and balance your portfolio based on the revenue philosophy set for education?
- After the above conversations have happened, it becomes easier to address an education committee, a scientific committee or a programming committee. Clear philosophy around this area also then starts to drive better business discipline in all areas of education. A member has an idea for a new program? Terrific, let's consider the business case and financial projections for these programs prior to giving the project the green light.

Again, there are no absolutes in this, other than “being deliberate.” Being deliberate sets the stage for important conversations around education. There may be times that the association believes it needs to educate members (or even non-members) because it is in the interest of the public good, patient safety or in accordance with furthering its strategic plan—maybe at no fee, even in a revenue-generating

enterprise. Having a deliberate philosophy in place forces a conversation to happen that can justify going outside of the precedent set.

### 3) Should the association aim to serve members primarily, or member and non-member constituencies?

This question often receives a quick and emphatic response. Most associations view themselves as an entity to serve their members exclusively. And while that is largely true, there may also be opportunity, and a business case, to more actively serve non-member constituents as well.

With demographic and societal shifts, some industries are “aging out,” others are seeing more competition for their membership dollars, and often younger professionals are not joining at the same rate as their more senior colleagues. All of this feeds in to whether the association should look at serving a market other than just its own membership.

A large professional association recently learned that its only profitable programming was serving an almost exclusively nonmember audience. Its senior executive team quickly thought it had completely missed the mark. After more careful conversation and thought, it determined it was going to continue to offer those programs, and perhaps even enhance them, even though these markets were likely to never join the association. Why? Because part of its mission was to raise the bar on the industry overall. IN serving this (lucrative) sector of the market, the association was able to continue an important revenue stream and serve its mission.

### 4) Know the data on your programming cold

It should be the job of everyone in your education department to know how your programs are performing. There are two key areas that should be top of mind to anyone working directly in education (or its C-suite!):

- Average attendance size per class OR the overall financial scenario for each product line
- Overall quality indicators



Why are these two elements so important to the business of education? Because if either one slips, revenues (or profit) will follow. Set objectives and track them closely.

## 5) Ongoing Program Review

Part of the work of managing a relevant and prosperous education portfolio is consistent and thorough review. Is attendance or quality slipping? Is the course content outdated? Are we carrying outdated or underperforming programs simply because we are not being deliberate enough about reviewing our portfolio? And perhaps most importantly, are we adding new programming, and do we have the bandwidth to continue to carry the load on all for the programming we are offering?

Content needs to be thoroughly evaluated for each course every 1-2 years. Other variables around the course need to be evaluated every 9-12 months, or at a minimum, before budgeting time each year.

## 6) Determine which of your programs might be suitable for micro-learning.

- Consider the value of creating alternate products out of existing content. Associations often believe they need to consistently be creating. To be sure, you need to be consistently updating, but creating and creating and creating is not always the answer. Assuring that you have an updated, relevant viable product in a consumable form to your members and constituents can get you much further than you are right now. Look at what you have. Understand where you need to adjust and update. Think about how your members want to consume that content. Prioritize content by what is most critical to your constituency and their learning needs that will create a difference for them professionally.

This also allows the association to salvage viable content from educational programs rather than simply eliminate. If elements of a course are old, but other parts have content that is still very relevant and current, consider whether that content can stand on its own as a micro-learning option.

## 7) Developing versus importing programming


A well-balanced education portfolio will mix “imported content” with association-designed and owned courses. “Imported content” is defined as that content for which you receive a proposal, pay the speaker an honorarium, they deliver the program (once, twice, or even throughout the year)

but the association does not own the intellectual property for the content.

Quality and context issues should be considered when importing programs and will require an extra level of due diligence and oversight. However, the organization likely cannot afford to develop all of its own programming and should not endeavor to do so. Instructional design is an expensive endeavor. While it is completely appropriate to develop and own the IP rights to some of your content (that is foundational to the field or profession, or that which is considered evergreen and has a long shelf life), you must consider what amount of time and how many registrations it will take to recover the cost of the course. Again, there may be other reasons to develop and own these courses (the desire to be seen as THE source in an industry and being willing to make an investment to be that source, etc.) The association should determine a reasonable amount of time by which it expects to recoup its instructional design costs for each program, which will not happen overnight.

## 8) Commit to capturing strong demographic data on all courses.

Are you serving the members or constituents you intended to serve? It is important that you understand the demographics of your learners implicitly. Yes, this means you may have to ask a few additional questions on post-program surveys, and also assure that you are getting to the entire membership (not just those who attend) at least every other year to understand the demographics of those who are not attending.

Some of you may be working in associations that are already doing all of this due diligence on your programming, and more. For those who are not, there is not time like the present to start. A deliberate plan will show immediate and measurable impact. 

---

**Debra Zabloudil, FACHE**, is the president and founder of The Learning Studio, Inc. She can be reached at [debra@learningstudio.biz](mailto:debra@learningstudio.biz).

# Preparing for an Office Lease Expiration

By **Gregg F. Witt, SIOR**

**Gregg F. Witt, SIOR**  
*Senior Vice President*  
CBRE



Gregg Witt is a Senior Vice President with the Office Occupier Practice Group at CBRE. A well regarded negotiator, Gregg provides his clients with a process driven approach and deep project understanding. He represents nonprofit organizations, corporations, privately held companies and professional firms. Gregg has been an integral part of more than 1,200 transactions and consulting assignments in excess of \$2.0 billion over his 37 year career. Mr. Witt is also a member of CBRE's Nonprofit Practice Group and is the Chicago Practice Leader. Gregg Witt joined CBRE following the firm's merger with Insignia/ESG where he was a Senior Managing Director in the tenant representation group. He joined Insignia after its acquisition of Frain Camins & Swartchild, where he was a Principal and began his career in 1981.





**T**he headquarters office space is the most central aspect to an organization and a major component of its identity. For groups that lease their headquarters space, a decision must be weighed every five or ten years on whether to renew or relocate. CEOs and CFOs and other decision-makers will ask about the steps necessary to begin the process. Here are the things to consider as you get started on your review.

## Critical Dates

The most important matter when contemplating a review of an office lease is knowing any critical dates associated with it. Among many dates and clauses within a lease, the most important critical date is the lease expiration. This is the date the contract with your landlord ends. There are ramifications for missing this date and remaining in the space beyond the natural expiration. A holdover provision may cause the organization to automatically renew its lease for a short period of time at double rent, or worse, suffer from both direct and consequential damages incurred by the landlord because of the holding over.

Another critical date that an organization may have in its lease is an early termination provision. This provision is negotiated in many long-term leases and allows for a lease to be terminated at a specific date prior to the true lease expiration. Where a termination option exists, the tenant provides advanced written notice, usually a year in advance, and a payment to reimburse the landlord for unamortized costs of making the current lease. Sometimes this payment will include several months of rent in addition to the unamortized costs. All or a portion of these payments might need to be given to the landlord at the time of notice, with any balance due prior to the effective date of termination.

The option to renew provision is also an important critical date to understand. This is the last moment that a tenant controls its ability to remain in its space. It is crucial that in a real estate strategy which includes the alternative of remaining in the existing space, the decision is made ahead of the renewal option notice date. A renewal option provides the tenant leverage in

a negotiation with the landlord. However, once the renewal option date passes, the landlord can negotiate with any other tenant to occupy your space. One might ask why a landlord would do this. There are several circumstances where this might occur. The size of the space plays a role in the landlord's decision. Your organization might be a small tenant in the building and there are one or more larger tenants needing additional space. The need to accommodate a large growing tenant may take precedent over a smaller one, even one that has been in the building a long time. It may be as simple as they want to go a different direction or have another use for the space. The bottom line is that an option to renew favors the tenant and controls the timing and conditions of the renewal term.

## Starting the Process

Most organizations should begin their evaluation from 12 to 36 months prior to a lease expiration or early termination date. The time necessary will be based on several factors including the size of the office, market conditions and the organization's internal processes. Should the organization conclude that it will be relocating to new space, then it requires a decision at least one year ahead of any critical dates. This provides the organization the time necessary after a lease is executed to prepare and construct the new space. If a decision is made to stay, then it is best to have enough time to study the market prior to any renewal option notice periods in the lease.

Experience shows that it typically takes longer for nonprofits to make real estate decisions.



---

“A decision maker must go into the real estate process with eyes wide open. There are always surprises when evaluating a dynamic office space market. Competition for quality spaces is always high and this sometimes forces a decision quicker than the organization is able. Understand that curves balls will be thrown and be prepared for them when they appear.”

---

As an organization begins to consider its lease's critical dates, it also must layer in how and when decisions are made internally and any input its board will have in a final decision. The timing of board meetings, annual meetings and other key events impact the schedule and possibly the signing of a new lease.

The boards of nonprofit will influence the real estate project and staff will need to navigate this oversight. The size and complexity of the project is one factor on how involved a board becomes. It is not uncommon for a board to create a real estate task force to work with staff on a lease review. In these situations, the task force might take a hands-on approach during the process and serve as a sounding board prior to approvals by the board. In other cases, the board's executive committee monitors the staff's actions and provides carte blanche, so long as certain financial and business parameters are met. Here senior staff has the ability to move the real estate process forward with little or no input. It is important to understand which type of board you have before the process begins.

No matter the role the board takes in reviewing these actions, senior staff should form its own internal working group. Many times, this group will just involve the two or three most senior staff members. Sometimes the CEO will delegate this task to the COO or CFO and only be involved in major decisions. In larger organizations, the internal group might compose senior staff and major department heads in order to receive input from major stakeholders.

Whatever your internal process, senior staff needs to understand the financial implications of

renewing your lease or relocating to new space. The real estate decision will cause the organization to incur expenses beyond any landlord concessions provided. The cost to construct the space, pay architects/engineers and other consultants, relocate and acquire furniture and technology are significant today. Identifying potential cash required and knowing how and when it will be funded should be clear to all stakeholders at the beginning of this evaluation. Sharing with the board of directors early is always better than having a surprise at the eleventh hour as you are concluding the lease negotiation and seeking final approval.

## Your External Team

Having your internal team set, it is then time to assemble an external team of professional advisors. The first advisor generally hired is a real estate broker that specializes in exclusively representing office space users—a tenant representative. Today's real estate broker will bring market insights, negotiation skills, financial savvy and an ability to serve as your organization's advocate. The broker engaged must be able to guide the organization through the pitfalls of the process and understand the quantitative and qualitative factors that impact decisions. A broker must understand the effect each lease issue has on both the tenant and the landlord.

The following should be considered when engaging a real estate broker:

- The individual should specialize solely in representing tenants and not represent any building owners/landlords.



- The broker should demonstrate knowledge and insights about the local office space market and have a track record representing nonprofits and other users of similar-sized space.
- The professional should demonstrate an understanding of how nonprofits operate, and the decision-making process used.
- The firm which the broker works for has resources to support the efforts. Resources that might be relied on during the project include financial analysis, project management, move management and market research.


One of the broker's critical roles is to serve as the coordinator of the project team. On medium and large square footage projects, engaging a project manager from your broker's firm is an important addition to the broker's team. While the broker will negotiate on the organization's behalf, the project manager supports these efforts and oversees the new space getting built. The project manager, or owner's rep, plays a key role in managing budgets and the schedule and will engage other consultants and vendors on the organization behalf at the appropriate time.

Working with the organization's internal team, the broker and project manager, after understanding the tenant's needs and requirements, will identify and select an architectural firm and other consultants that are necessary in completing the project. The architect/space planner is usually the next member of the project team added and should be hired early in the process. Typically, an RFP and interview process will be conducted to choose the firm that fits best. The architect/space planner will play a greater role in large and medium sized offices; evaluating an organization's current and future space needs, describing workplace trends, how furniture and systems are used and recommending the type of space and floor plates that work best.

## Let's Go

At this point your organization is ready to start down the path to define needs, evaluate the market, short-list options and make the real

estate decision. Once a building is chosen a general contractor will be selected to assist in budgeting construction costs associated with the tenant build out and ultimately constructing the space. There are many points during the real estate process where legal advice will be required. In addition to reviewing the lease document, your attorney will be reviewing any contracts with consultants and other vendors.

A decision maker must go into the real estate process with eyes wide open. There are always surprises when evaluating a dynamic office space market. Competition for quality spaces is always high and this sometimes forces a decision quicker than the organization is able. Understand that curves balls will be thrown and be prepared for them when they appear. 

---

**Gregg F. Witt, SIOR**, is a senior vice president at CBRE. He can be reached at [gregg.witt@cbre.com](mailto:gregg.witt@cbre.com).



# CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, CEOs Ask, Young Professionals Answer Young Professionals Answer Young Professionals Answer Young Professionals Answer Young

## Keelin Billue

*Marketing Specialist,  
Foundation for Anesthesia  
Education and Research*

Keelin Billue is a marketing specialist at the Foundation for Anesthesia Education and Research, an organization related to the American Society of Anesthesiologists (ASA). She specializes in association and research foundation stewardship, marketing, design, and communications.



## Jean Boisson

*Talent Acquisition Specialist  
American Osteopathic  
Association*

Jean Boisson is a talent acquisition specialist at the American Osteopathic Association, which serves as the professional family for more than 137,000 osteopathic physicians and medical students across the U.S. With primary responsibilities of recruitment and onboarding, Boisson enjoys the challenge of finding the right person for the job. His motto is "Hire the right person, in the right position, at the right time!"



## Francesca Malin

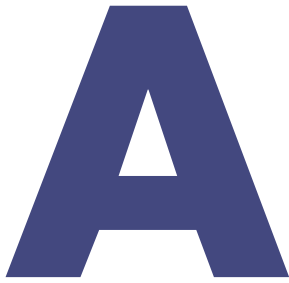
*Event Manager,  
SmithBucklin*

Francesca Malin is an event manager for SmithBucklin, an association management and services company. Fueled by her creative edge, her specialty is in delivering experiential events that engage attendees, create a dynamic environment for learning and networking, and meet the strategic goals of the associations she serves.



By **Jen Creed**





Associations, like all organizations in today's world, face a common challenge: How to appeal to and engage with millennials. Whether it's as consumers, members, or employees, we want to know what they want, what's important to them, and how to keep them engaged.

These questions are especially relevant in designing the future workplace. How do we attract and retain emerging talent? What can our organization offer that will resonate with young professionals? Numerous reports, such as Deloitte's 2017 Global Human Capital Trends and Mercer's 2018 Global Talent Trends, provide insightful data and analysis on this subject, and some common themes are apparent. For example, millennials desire ongoing professional development. They also look for agility in their employers—not only in adapting to, but leading change. And they want a work experience full of purpose.

The reports' conclusions mirror what we're finding anecdotally in our workplaces. For this article, we asked association industry CEOs what they most wanted to know about millennials. Three young professionals from the Association Forum community offered their responses.

## What attracts young professionals to the association industry, even if the benefits may not be as robust as at a for-profit entity and the missions may not be as cause-based as other nonprofits?

Question submitted by:

Denise Freier

CEO

Strategic Account Management Association

**Billue:** Similar to many of my younger colleagues, I landed into the nonprofit world by way of a temporary staffing agency. I was completely unaware of this realm, having only worked in positions at for-profit entities. From my experience, I see associations as a happy medium for those who do not find joy working on behalf of for-profit entities, yet still enjoy the benefits associations can offer. I find that they offer tangible and intangible benefits as well as intellectual stimulation. In my experience working at associations, even if I have a bad day, I know I am doing important work that will help someone else. As a person with many interests, a “jill-of-all-trades,” I'm so happy associations introduce me to the ins and outs of

different professions. When you work for an association, it's like having an infinite number of careers all rolled into one position. It never gets old.

**Boisson:** I think the flexibility and work-life balance that the association industry provides is invaluable. We're living in a time where people are starting to value their freedom a lot more and aren't necessarily willing to compromise it for a huge paycheck or extravagant benefits. Also, many associations support a cause-based mission, which really appeals to young professionals. At the end of the day, we want to genuinely feel like we're making a difference.

**Malin:** My colleagues and I enjoy a wide variety of projects and responsibilities in working for associations. I don't think we'd have the same opportunities in the for-profit world. Our work is also meaningful. I am excited when I can help create an event that inspires, educates, and enriches our attendees. I love seeing them arrive onsite ready to immerse themselves in experiences that they know will help them grow as professionals. I'm especially proud when they leave completely energized and ready to make changes in their work that will make a difference – and I know I have contributed to that, even in a small way.

## What advice would you give to more seasoned professionals who work closely with younger colleagues? How can they best connect and support each other?

Question submitted by:

Geoffrey Brown, CAE

CEO

National Association of Personal Financial Advisors

**Billue:** I am very lucky to have strong mentors in the association world. To be an outstanding mentor, I believe one should be assertive while also displaying gentleness. I appreciate when my mentors are honest with me, even about the tough subjects, and when they confidence in me.

**Boisson:** Be open-minded to new ideas that are brought to

the table and understand that many younger professionals are working toward the same common goal. Simplifying processes make everyone's life easier. Younger professionals are not out to take your job, they just want a seat at the table. Innovation and collaboration are the best ways to connect and support each other.

**Malin:** Young professionals prefer aspects of their career and personal life to be instantaneous. When hearing feedback and implementing changes, we want to rework something immediately versus a more seasoned professional who might wait for a review, debrief, or specific meeting. We also bring different ideas and new thinking to the table. I think understanding and respecting the differences in approaches and opinions help bridge the working relationships between generations.

## What has surprised you most about working in the association industry?

Question submitted by:

Paul Pomerantz

CEO

American Society of Anesthesiologists

**Billue:** I am still surprised and amazed by the size of the association industry. It's also very interesting how governance structures can be similar, yet so different.

**Boisson:** Acclimating into the association industry with a corporate background was a bit like operating in a different world. It takes time to adjust to the acronyms, structure, pace, and emphasis on membership.

**Malin:** There truly is an association for everything! I have had the pleasure of working alongside healthcare clinicians, engineers, financial and insurance event professionals, and manufacturing technicians. I think associations really help them excel in their jobs.

## If there was one thing you would change about your own association or a typical association structure, what would it be? How would it help?

Question submitted by:

Rob Paterkiewicz, CAE, MBA, IOM

Executive Director/CEO

Selected Independent Funeral Homes

**Billue:** I wish association staff members took better care of ourselves – both personally and professionally. Personally, this means learning from each other on how to improve our work-life balance and manage stress better. Professionally, it means sharing best practices about how to build and maintain relationships with members and how to manage members' expectations.

**Boisson:** I would like to see associations emphasize an organizational development strategy, which would help develop their workforce. By offering more continuing education and other professional development opportunities, associations will help employees grow and evolve over time. .

There's also a deficit in leveraging best practices among associations because each organization thinks it's different from others. The reality is associations can benefit from practices other associations use to achieve successful outcomes.

**Malin:** Associations have a reputation for being slow to implement change. I think it's the processes and protocols they have in place that sometimes hinder their speed in adopting new ideas. I understand why these processes and protocols are necessary, but I've also seen organizations that are truly innovative because they are nimble and committed to moving their organization forward.

## What qualities do you think makes a leader well-suited for the association industry? What qualities do you have that make you a successful association professional?

Question submitted by:

Mitch Dvorak, MS, CAE

Executive Director

International Association of Oral and Maxillofacial Surgeons

**Billue:** Many leaders I've met have an excellent poker face, but they're also super friendly. They have the ability to navigate difficult personalities in a calm and persistent way. These leaders I know who are fair and considerate are the same leaders that have a great relationship with their association board. In their tenure, they were able to successfully improve relations with an existing board or set necessary boundaries.

Because I have worked in a variety of roles in my association, I am growing as a leader. It has enabled me to understand how all the parts of the sum come together and how collaboration across departments helps us achieve our goals. I also have greater respect for my colleagues and their work.



---

“Millennials desire ongoing professional development. They also look for agility in their employers—not only in adapting to, but leading change. And they want a work experience full of purpose.”

---

**Boisson:** Initiatives are constantly changing in associations and having the ability to clearly articulate and manage through those changes will surely aid in any leader's success. Additionally, it's important to be transparent and build trust amongst staff members to ensure buy-in to the strategic plan.

My ability to adapt to any change and my patience have both aided in my success as an association professional.

**Malin:** In any industry, I think a leader is someone who challenges the status quo. You can't keep doing things because they're working—you have to ask yourself and others, “What can we do to make this even stronger?” Even if membership, financials, or attendance are in a great place, you should continue to raise the bar and not get comfortable. There's always room for improvement. People will return to a place that provides new experiences and value that they cannot get anywhere else.

I try to implement the qualities I look for in a leader into my own work. Just because I have solid attendance at an event one year, doesn't mean the next year will be the same. I want to be part of a team that's raising the bar for the next greatest event—a team that competitors want to copy.

Which ‘old fashioned,’ ‘outdated’ attitudes or approaches most prevent you from bringing your best to the table?

Question submitted by:

Kimberly Mosley, CAE, CPE

President

American Specialty Toy Retailing Association

**Billue:** I think some associations are hesitant to adopt a digital marketing strategy. As member demographics change, so should the strategy and offerings. We get so hung up in bureaucracy, we forget to be transformative and see “the forest from the trees.”

I also find outdated employee benefits to be off-putting. Personally, I am always so thankful when my employer allows me to recuperate after a hectic time (conference, board meetings, etc.). I can put more energy toward my work when I'm not worrying about essentials like my health and getting good rest.

**Boisson:** I like keeping up-to-date with technological advancements in the HR field. I think we can learn a lot from the cor-

porate world about new systems that automate and streamline processes and make our jobs much easier.

**Malin:** I find folks who are resistant to change the most difficult to work alongside. Since I want to truly bring innovation to association events, it alters the amount of innovation I provide or suggest when working with those who are slow to change. When I encounter someone who is resistant to change, I try to limit my suggestions to a few new ideas versus many.

How do you see the association industry evolving in the next 10-20 years?

Question submitted by:

Anonymous, CAE

**Billue:** I think we will see more personalized experiences and digital offerings for members. For employees, I think there will be a shift to remote work environments and relaxation from outdated office culture. I'm curious to see how automation and artificial intelligence will affect our industry, as well.

**Boisson:** Within the next 10-20 years, I see a lot of associations diverting from their dependency on membership dues and making a concerted effort to focus on building other streams of revenue. Some associations already have difficulty marketing to a younger demographic and will have to get creative in how they generate revenue.

Also, with all of the mergers and acquisitions that are taking place in today's world, I wonder if we may begin to see this in the association industry.

**Malin:** I think association management professionals will have to set an even higher bar for engaging millennials. If we're not seeing a return on investment (ROI) from the association, we are less likely to continue our membership. Association management professionals will need to come up with creative ways to maintain engagement and offer ROI to young, emerging professionals. 

---

Jen Creed is the director of talent development for SmithBucklin.

## MARCH 2019

Association Management Center	Connect2amc.com	19
Boston Convention Marketing Center	www.signatureboston.com	5
Choose Chicago	www.choosechicago.com	Back Cover
Cook and Kocher Insurance Group	www.cookandkocher.com	45
DelCor	www.delcor.com	17
eShow	www.goeshow.com	Inside Back Cover
Louisville CVB	www.gotolouisville.com	15
Smith and Wollensky	www.smithandwollensky.com	11
Tourism Vancouver	www.tourismvancouver.com	21
Visit Aurora	www.visitaurora.com	Inside Front Cover, 1
Visit Phoenix	www.visitphoenix.com	13
Visit Seattle	www.visitseattle.org	23

# Want to read FORUM on the go?

Download the mobile FORUM Magazine app and read about the latest association trends from your phone or tablet!



To download the app from the App Store or Google Play, search for "FORUM Magazine."





# ASSOCIATION FORUM'S PARTNERS *Make it* POSSIBLE

## Visit Phoenix

### Lorne Edwards

Vice President, Sales & Services  
400 E Van Buren Street Suite 600,  
Phoenix, AZ 85004  
877-MEET-PHX or 602-254-6500  
ledwards@visitphoenix.com  
www.visitphoenix.com



Calling on a well-oiled machine like Visit Phoenix ensures that meeting planners and attendees have all the city's hidden gems and newest must-sees on the itinerary. Phoenix has long been known for its resort collection, dramatic mountains and desert vistas. But billions of dollars in recent investments has now placed downtown Phoenix on the major convention circuit. The urban core surrounding the Phoenix Convention Center is growing and evolving daily. Thanks to an influx of entrepreneurs, visionaries, students and artists, the city is brimming with youthful energy. Colorful murals dot the streets, new restaurants and bars are opening on a regular basis, and innovation is thriving.

The Phoenix Convention Center offers nearly 900,000 square feet of flexible event space, 312,500 square feet of continuous exhibit space connecting the North and West buildings, 99 meeting rooms and a 200-seat

lecture hall. This state-of-the-art meeting space is complemented by more than 3,800 guest rooms in downtown Phoenix.

The city's hotel and event facilities, paired with an extensive variety of dining, bar and entertainment options, also make the destination an attractive location for mega sporting events. Greater Phoenix is a tried-and-true sports city and was recently awarded Super Bowl LVII in 2023 and the NCAA Final Four in 2024.

At Visit Phoenix, the Sales and Services teams are ready to connect planners with members of the local community who best align with their group's strategies and objectives. The city's growing knowledge economy includes leading biomedical institutions and facilities, a significant growth in tech companies and the expansion of Arizona State University's downtown Phoenix footprint.

## Visit Charlotte



In Charlotte, North Carolina, we've long understood the impact of meetings and conventions on our growing city. That's why our team at Visit Charlotte has increasingly focused on providing amenities that make visitors more comfortable. In 2017, we rolled out free Wi-Fi at the Charlotte Convention Center, and this spring, we're embarking on a \$110 million renovation that will add 50,000 square feet of meeting space (a total of 55 breakout rooms) to our building.

Don't worry—the Convention Center's unaffected spaces will remain open to groups during this period, and planners will continue to enjoy the perks of our friendly, walkable city. But we're also excited about the changes to come. When we begin contracting new spaces in spring 2021, we'll be able to offer planners unparalleled accessibility to our city's amenities: An overstreet pedestrian walkway will connect the Convention Center to The

Westin Charlotte, two new hotels in a neighboring mixed-use development, and the LYNX Blue Line light rail Stonewall Station, which provides access to abundant dining, retail and nightlife.

These updates not only make Charlotte a prime meeting destination, but they also speak to the city's undeniable energy. Seated in Uptown Charlotte, only 7 miles from the airport, our Convention Center is in the heart of one of America's fastest growing cities. With six locally headquartered Fortune 500 companies and numerous callouts from USA Today, Southern Living, Food + Wine, Meetings Today, Smart Meetings and more, Charlotte has solidified itself as a city on the rise.



## April 2019

APR  
4

### Industry Xchange

3 p.m. – 7:45 p.m.

Alhambra Palace Restaurant

1240 W. Randolph St., Chicago IL, 60607

*Industry Xchange is annual event that connects ten local industry associations and hundreds of hospitality professionals for curated conversations on the business of meetings and events as well as other pressing issues facing our community, both locally and globally.*

APR  
18

### Association Archives... Managing Your Institutional Memory

9 a.m. – 5 p.m.

*This workshop offers the practical information and tools necessary to identify records of enduring value and start an archives program that will benefit your association. Avoid costly mistakes, and even see a return on investment, by learning how to identify, preserve, and maintain appropriate records.*

APR  
25

### Webinar: Urgency – What to Do When There's No Time to Lose

11 a.m. – 12 p.m.

APR  
30

### Associations and the Law

8:30 a.m. – 5:30 p.m.

*This new event, hosted by the American Bar Association, will focus on legal issues and trends facing all associations, and will be geared for C-suite executives and association attorneys. Both CAE and CLE credit hours will be available.*

## May 2019

MAY  
1

### CEOnly Roundtable: Cybersecurity (In Partnership with the National Association of Manufacturers)

1 p.m. – 5 p.m.

MAY  
15

### Learning Experience Design Essentials

9 a.m. – 12 p.m.

*Explore several common factors contributing to program decline and experiment with one sure-thing solution: learning design. Join Tracy King, master strategist and learning designer, in an interactive learning lab applying her accessible design framework to a program you currently (or would like to) offer.*

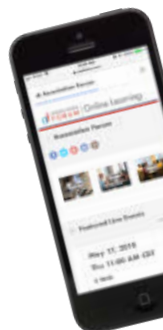
MAY  
16

### Webinar: Folding Time – Achieve Twice as Much in Half the Time in Your Association

11 a.m. – 12 p.m.

## House Calls—We Bring the Program to You!

An Association 101 house call delivers high quality education to your staff on your preferred date and without having to leave the office. This is available for groups of at least 15 and you will get a discount on the standard member rate. Contact [education@associationforum.org](mailto:education@associationforum.org) to learn more.



## Online Learning!

Easy-to-access on-demand education always available for the association professional on-the-go. Expand your knowledge and earn CAE credits at your convenience.

[pathlms.com/association-forum](http://pathlms.com/association-forum)

Events listed here are Association Forum programs. Further details and registration information can be found at [www.associationforum.org](http://www.associationforum.org). Programs are subject to change.

### Calendar Legend

● Education Events ● Shared Interest Group Events ● Webinars

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





# YOU DON'T NEED TO PAY MORE FOR EXPERIENCE

Cook and Kocher Insurance Group places insurance for close to 100 associations and non-profits in the Chicagoland area. CKIG provides creative solutions to help their clients mitigate risk while helping them to reduce their insurance costs.  
To learn more call us at 847-692-9200.

- DIRECTORS AND OFFICERS
- MEETING CANCELLATION
- MEDIA LIABILITY INSURANCE
- PROPERTY CASUALTY
- WORKERS COMPENSATION
- HEALTH INSURANCE

**COOK & KOCHER**  
INSURANCE GROUP

**Jack Cook**

CLU, ChFC, RHU

Jackc@cookandkocher.com

[www.cookandkocher.com](http://www.cookandkocher.com)

## Promotions and Changes



**Mike Norbut, MBA, MSJ**, has joined Association Management Center (AMC)

as vice president of business development. Prior to joining AMC, he was a vice president at McKinley Advisors, an organization at which he worked for over a decade. Norbut previously worked as a journalist, including as a staff writer at American Medical News. He is member of Association Forum's Content Strategy Advisory Group and has twice been the chair of the Editorial Working Group.



**Joel Albizo, FASAE, CAE**, has been named the CEO of the American Planning Association (APA) and the American Institute of Certified Planners (AICP), effective April 8. Albizo has more than 30 years of association management experience. Most recently, he was the CEO of the Council of Landscape Architectural Registration Boards (CLARB). He has also held senior management positions at the Society of Actuaries, PlantAmerica and the American Nursery & Landscape Association. Albizo is the current president of the Federation of Associations of Regulatory Boards and a former board member of ASAE.



Choose Chicago has promoted **Marc Anderson** to chief operating officer.

Anderson was previously the executive vice president for the organization. Prior to joining Choose Chicago in 2015, Anderson was the directing of marketing, Midwest and Canada, for Peninsula Hotels. Anderson currently sits on the board of directors for Association Forum and the Holiday Showcase Tradeshow Advisory Group.



**Larry Weindruch, CAE**, director of public affairs at the National Sporting Goods Association (NGSA) has retired, effective March 1. He has been with the organization for 33 years, previously serving as director of communications and in publishing roles. In addition, he has served as the president of the National Ski & Snowboard Retailers Association (NSSRA) since 2010. Weindruch was an award-winning sports journalist, having spent 28 years as a sports correspondent with the Daily Herald.



Visit Indy has hired **Baylee Johns** as senior sales manager for the Chicago and Midwest Market and has promoted **Ashley Sisson** to meetings express sales manager.

Johns has nearly a decade of experience in sales, most recently as a senior sales manager with the Omni Severin Indianapolis Hotel. Sisson has been with Visit Indy since 2008 and graduated from Indiana University Purdue University of Indianapolis with a bachelor's degree in Tourism,

Convention and Event Management.



**Aileen Laracuate** has joined the Monterey County Convention and

Visitors Bureau (MCCVB) as regional sales executive, representing the MCCVB in the Midwest region. Laracuate spent nearly 18 years with the Puerto Rico Convention Bureau and six years in sales with Meet Puerto Rico. She has been active on a number of industry committees and boards, including as chair of the community services committee at PCMA, chair of Destination Reps and as a board member of Meeting Professionals International.



**Amy Wilkinson, CMP**, has been promoted to director, global events for the

Society of Laboratory Automation and Screening (SLAS). She has been with the organization since 2006, most recently serving as senior manager, events and education. Wilkinson holds a B.S. in Sports Management from Central Michigan University and began her career with the Chicago Blackhawks.



The Heart Failure Society of America (HFSA) has named **John Barnes** as

CEO. Barnes has served as the interim CEO for the organization since 2018. Prior to joining HFSA, Barnes was the president of Barnes Association Consultants. He has held executive leadership positions

at the American Physical Therapy Association and the American Academy of Dermatology. Barnes has also worked on Capitol Hill as Chief of Staff for U.S. Representative Greg Ganske and as Special Assistant to U.S. Senator Chuck Grassley.



**Danielle N. Twait** has joined Chicago Law Partners, LLC, as an attorney in its

nationally recognized trade and association law practice. Twait graduated cum laude from Washington University School of Law in 2008 and served as editor of the Washington University Law Review. In 2018, She was recognized by the American Bar Association as a recipient of the On The Rise Top 40 Young Lawyers Award. Twait serves on the board of the Coalition of Women's Initiatives in Law, where she was selected to be a member of the executive committee and treasurer for 2019.

## New AF Members

### Individual Members

**Genae S. Barron**, American Board of Cosmetic Surgery

**Marty Bear**, Professional Marketing Services, Inc.

**Amber Bovenmyer**, Web Courseworks

**Priya Garg**, American Osteopathic Association

**Jim Grillo**, Hereschicago.com

**Ashley Johnson**, AHA-AONE

**Andreia Krause**, American Osteopathic Association



**Sara Krueger**, Event Garde  
**Laura Lutter Cole**,  
 Visit Milwaukee  
**Kristin MacKenzie**, ASCP BOC  
**David Nyquist**, Four Seasons Island Resort  
**Mariam Owodele**, American Academy of  
 Sleep Medicine  
**Andrea Pabis**, American Nuclear Society  
**William Padilla**, American Osteopathic  
 Association  
**Michael Pollock**, Depression and Bipolar  
 Support Alliance  
**Ali Ribordy**, Boise Centre  
 Convention Center  
**Jorge Rivas**, Prospanica  
**Shelley Sanner**, McKinley  
 Advisors  
**Michele Scheel**, Smith & Wollensky  
**Dawn Soukup**, Planstone Group  
**Melinda Starkweather, CMP**, Starkweather  
 Association Services LLC  
**Deborah Stevens**, ASAE

### ***FORUM Plus Members***

**Rosemarie Balk**, **Krista Kauper**, **Dennis Pulido**, **Sandra Ring** and **Chris Van Opstal**,  
 American Academy of Dermatology  
**Amanda Duski**, American Academy of  
 Implant Dentistry  
**Todd Applebaum** and **Tony Priore**,  
 American Academy of Orthopaedic  
 Surgeons  
**Sahenaz Pirani**, American Association  
 of Medical Assistants  
**Joseph Brownlee**, American Bar  
 Association  
**David Bartholomew** and **Felicia Bloom**,  
 American College of Healthcare Executives  
**James Polous**, American Epilepsy Society  
**Jennifer Dawson**, American Health  
 Information Management Association  
**Ann O'Neill**, American Orthopaedic  
 Association  
**Dawn Hermann** and **Jenny Zales**,  
 American Society for Dermatologic  
 Surgeons Association

**Andrea Bilsky** and **Michael Thill**, American  
 Society of Anesthesiologists  
**Nicole Curtin** and **Karen Lyp**, American  
 Society of Neuroradiology  
**Kathlene Boone**, American Society of  
 Safety Professionals  
**Diana Martinez**, Appraisal Institute  
**Sherri Goodlove**, **Colin Higgins**, **Chakira Lane**, **Kathy Liwag**, **Madeleine Marret**,  
**Ricardo Moraga**, **Sarah Udelhofen** and  
**Andrew Vaaler**, Association for Supply  
 Chain Management  
**Lily DeSchaaf**, **Judith Greifer**, **Mike Norbut**  
 and **Valerie Smoots**, Association  
 Management Center  
**Marietta Freeman** and **Erin Menet**, CCIM  
 Institute  
**Michelle Bradley**, **Nikita Fitch**, **Jacob Knabb**  
 and **Christie Wereski**, Chicago  
 Association of REALTORS  
**Tom Bendetto**, Chicagoland Apartment  
 Association  
**Danielle Bauer**, Coin Laundry Association  
**Alicia Belcaster**, **Jennifer Buckley**, **Matt Dominis**,  
**Matthew Hessler** and **Heather Nash**,  
 Emergency Nurses Association  
**Mara Daiker**, **Karla Shao**, **Toria Shaw**,  
**Stefan Werdegarr** and **DonVielle Young**,  
 Healthcare Information and Management  
 Systems Society (HIMSS)  
**Lisa Sevier**, International Association of  
 Defense Counsel  
**Dawn Latham**, International Association of  
 Lighting Designers  
**Bob Birdsell**, ISACA/IT Governance  
 Institute  
**Krzysztof Flaga**, **Joanne Jensen**, **Julie Langlie**,  
**Jessica Medell**, **Eddy Mirko**,  
**Rebecca Moyer**, **Giang Ngo**, **Michelle Sweeney**,  
**Norah Webster** and **Brittany Wright**, Million Dollar Round Table  
**Rob Harkey**, National Association of  
 Personal Financial Advisors  
**Carlos Cardenas**, National Board of  
 Certification & Recertification for  
 Nurse Anesthetists  
**Stephanie Blackwell** and **Jamie Christensen**,  
 National Roofing  
 Contractors Association

**Bronwyn Horton**, **Cody Kahl**, **Becky King**  
 and **Mike Smith**, Precast/Prestressed  
 Concrete Institute

**Kara Barker**, **Amanda Decker** and  
**Meaghan Roche**, Radiological Society of  
 North America

**Amanda Morrone**, REALTORS Land  
 Institute

**Julianne Allen**, **Linda Benck**, **Dana Brenner**,  
**Aaron Bukovick**, **Kirsten Chute**, **Makenzi Claassen**,  
**Victoria Clucas**, **Victoria Contreras**, **Angela Dahl**,  
**Sarah Dailey**, **Scott Dillion**, **Craig Dooley**, **Elaura Dunning**,  
**Kimberly Findlay**, **Sarah Gornik**, **Christine Green**,  
**Julie A Hammock**, **Jane L Hendrix**, **Francesca Jeske Malin**,  
**Elizabeth Johnson**, **Grace Johnson**, **Knaus Kara**,  
**Julianne Kennedy**, **Samantha Kirby**, **Krista Anne Lebrun Baum**,  
**Suzanne Schecht Levy**, **Silvia Lucchinetti**, **Kimberly McBride**,  
**Kathryn McGehee**, **Amy Michel**, **Janet Miller**,  
**Meghan Morasan**, **AnaMarie Napolitano**, **Laura Penning**,  
**Kelly Rehan**, **Rita Dicuccio**, **Amalia Rocha**, **Robin Rone**,  
**Kimberly M Skrundz**, **Anita Stimson**, **Violeta Szczebak**,  
**Jamie Tennison**, **Abigail Trebels**, **Jennifer Walter**,  
**Kelsey Whitney**, **Lauren Willett**, **Joanne Williamson**  
 and **Kelsey Witmer**, SmithBucklin

**Linda Maraba** and **John Stangel**, Society  
 for Vascular Surgery

**Nicole Ramirez**, Society of Actuaries  
**Jill Goldberg**, Society of Critical Care  
 Medicine

**Dale Gibbons**, Society of Gynecologic  
 Oncology

**Judy Burke**, **Emily Burnett**, **Sabrena Lopez**,  
**Dolores Mannella**, **Trenyce McCoy** and **Jack Thompson**,  
 Society of Women Engineers

**Kristin Bertsatos** and **Laura Caputo**,  
 Turnaround Management Association

**Joe Eckl**, Urgent Care Association

### ***Forum PLUS Organizations***

**Chicago Association of REALTORS**



### Digital Extra

To access Personify's "Young Members 2.0: Understanding and Benchmarking the Membership Preferences of Millennials and Generation Z," visit the digital or mobile versions of *FORUM*.

## Younger Generations See Value in Associations

Associations have been battling to attract the attention and engagement of Millennials for over a decade now, but as that generation moves into leadership positions and adapts the industry to their liking, another group of young members is moving in right behind them—Generation Z.

According to *Young Members 2.0: Understanding and Benchmarking the Membership Preferences of Millennials and Generation Z*, a research report from Personify, younger generations "...recognize the importance of membership and are eager to join." The puzzle that associations must solve is how to engage and recruit these members.

The instinct is to assume that newer generations, who have been plugged into the digital world their whole lives, would best be reached through social media and email, however word-of-mouth remains the top way new members are convinced to join an association. In addition, 78 percent of respondents to the survey indicated that phone calls are either somewhat or very effective in engaging them. The value of a transparent and in-person relationship can be easily be traced to the multitude of misleading communications and advertising littered across the internet and the growing distrust of anything one sees online.

This doesn't mean you should abandon your digital communications plan. Younger generations still see great value in content delivered to them through email or social media, though not all outlets are equal in their eyes. Facebook remains the top social channel for connecting to members, while Instagram, in a surprise jump, came in second. LinkedIn, a platform seemingly built for exactly this purpose is at an all-time low, with only one in ten young members indicating they engage with their association on it.

### Reasons to Join an Association

	ALL YOUNG MEMBERS	MILLENNIALS	GENERATION Z
I will be given content that helps me learn more	92%	93%	88%
It will help me in my career	87%	88%	85%
The time and money spent to join will be worth it in the long run	87%	79%	85%
It will lead to networking opportunities	87%	79%	83%

Millennials are much more likely to say they might learn about an organization via Facebook, YouTube, Twitter or LinkedIn. Though Gen Z members are never more likely than Millennials for each of these platforms, they were disproportionately more likely to report learning about an organization through Instagram.

Source: Personify's "Young Members 2.0: Understanding and Benchmarking the Membership Preferences of Millennials and Generation Z"



# All your event management solutions, Under One Umbrella



- Mobile Apps
- Registration & Badge Production
- Exhibit Sales & Floor Plan Management
- Total Networking Xperience TNX
- Hosted Buyer Program
- Continuing Education Management & Certificate Printing
- Responsive Event Website Hosting
- Housing Management
- Session Tracking/Lead Retrieval/RFID
- Call for Submissions/Abstracts/Speakers with Committee Review
- Session & Speaker Management
- Meeting Logistics & BEO Management
- Banquet/Table/Seating Management
- AMS & CRM Integration

*Official Registration Vendor for Association Forum*

For more information contact  
**Mike Horton**  
mike.horton@goeshow.com

[www.goeShow.com](http://www.goeShow.com)

**eSHOW**  
event management solutions

# CHICAGO. HOME TO ENDLESS OPPORTUNITIES

Chicago provides hundreds of unique venue options for meeting and trade shows of all sizes. Home to the Western Hemisphere's largest and most flexible convention center, McCormick Place, the demand for hosting events is higher than ever.

In 2018, Chicago has had nineteen record-breaking attendance meetings with increased international presence. With a vast list of award-winning restaurants, professional sports teams, and world-renowned attractions,

**Chicago has something spectacular for everyone.**



FOR MORE INFORMATION GO TO [MEETINCHICAGO.COM](http://MEETINCHICAGO.COM)

CHOOSE  
**CHICAGO**