

# FORUM

APRIL 19 V103 N3

INFORMING & INSPIRING  
ASSOCIATION  
PROFESSIONALS SINCE 1916

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## AN EXPERIENCE UNLIKE ANY OTHER CITY

Phoenix's downtown vibe has a style all its own, with a trendy yet unpretentious ambiance that's accessible to all. The result is an eclectic mix of independent coffee shops, restaurants, bars, music venues and art galleries, creating an inspiring atmosphere that fuels team collaboration and fresh ideas.



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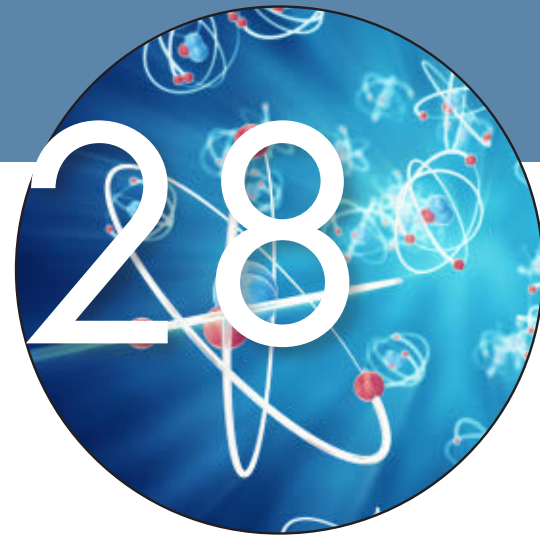
Every association has a multitude of stakeholders. Staff, board members, volunteers—but perhaps the most important stakeholders are your members. Unfortunately, these voices may also be the most difficult to hear. As you prepare for any strategic planning, consider the benefits of professional member research to help you listen, learn and lead.

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BIG PICTURE,  
ASSOCIATION FOCUS

## The Physics of Leadership

When that famed apple dropped on Sir Isaac Newton's head, he probably wasn't thinking about how it pertained to leadership. But the universal forces and laws of physics that apply to every molecule in the universe affect how humans interact and the ability to guide your team is based heavily on interactions. In this article, Kenneth Slaw, PhD, ties these principles to the fundamentals of leaderships.



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## Digital Extras

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



- LinkedIn Learning's "2019 Workplace Learning Report"

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*More than 100 Association and Non-Profits in the Chicagoland area rely on CKIG*



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**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.

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# A Fantastic Voyage into Digital Transformation

At the most recent Association Forum board of directors meeting held in March, the board approved our strategic plan for the new fiscal year. This plan included a review of our Painted Picture—an aspirational view of the future that tells a story on how we will evolve and grow over the next five years. Here is what our future looks like:



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

*It is the year of 2025, and Association Forum is a recognized leader in innovatively creating unique experiences that captivates and engages the association community. We have achieved unprecedented growth through being an advocate for the profession, as well as developing partnerships and alliances that are attracting the attention of constituents from various levels, including local, state and national. Our membership mirrors the diverse workforce of the future. We have an annual surplus. Our digital culture has transformed the business model to be agile, relevant and responsive. Staff resources have evolved to accelerate growth and be receptive to the new era of business. We are a welcoming environment with authentic relationships across our community.*

A key driver to achieving the goals of this Painted Picture is an intentional concentration on Association Forum's digital culture. Our members are eager for and deserve robust opportunities to access resources, content and education in ways that are convenient and personalized to their needs. We are committed to building a digital infrastructure that will support those opportunities.

For Association Forum, our ability to provide these upgrades requires an accelerated digital transformation to supplement the enhancements we have made over the past few years, including the launch of our online Learning Management System last year, a significant

increase in webinars and other digital learning content, and an update to our registration systems for our signature events.

We are excited about the strategic direction the board has set through our Painted Picture. This will be a journey not a sprint. Our intent is to stay relevant and agile to address your evolving needs. We are honored to serve our community by being an incubator for ideas and innovation. We will share the story of our digital transformation journey so that you may learn from our experiences, successes and failures. We will engage you on our journey through a working case study to understand how we will align the right culture, people and processes.

I am looking forward to working with the board, staff and volunteer leaders of Association Forum as we embark on this voyage. It is an exciting time for our organization and our members as we face the continual advancement of technology that will redefine how we do business.

*Michelle Mason*



As part of our efforts to provide a Welcoming Environment® for our members, we are providing a copy of our Core Values translated into Spanish by Interpro Translation Solutions, Inc.

### 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.

Como parte de nuestros esfuerzos por brindar un Welcoming Environment® a nuestros miembros, le proporcionamos una copia de nuestros Valores Fundamentales traducidos al español por Interpro Translation Solutions, Inc.

### Ser un entorno acogedor

Ofrecemos un entorno acogedor que busca mejorar a la comunidad en general de forma activa, al reconocer que un todo es más que la suma de sus partes. Haremos que todos los que interactúen con nosotros se sientan bienvenidos, representados, involucrados, inspirados y empoderados.

### Adoptar la innovación y calidad

Nos encanta probar nuevas ideas y buscamos inspiración dentro y fuera de la asociación comunitaria; valoramos las mejoras, tanto grandes como pequeñas. Alentamos y celebramos la experimentación relacionada con los adelantos; sin embargo, sabemos cuándo suspenderla. Nuestro objetivo es mejorar continuamente.

### Diviértase y mantenga una actitud positiva

Está comprobado que generalmente usted pasa más tiempo con sus compañeros de trabajo que con su propia familia. Nos esforzamos por lograr que nuestro entorno de trabajo sea divertido, positivo y en general un excelente lugar para trabajar.

### Comunicación franca y honesta, y trabajo en equipo

¡Uno no sabe lo que no sabe! La comunicación efectiva es clave. Promoveremos un entorno en el que hablemos de manera franca y honesta, con el objetivo de construir un mejor equipo. Incorporamos la franqueza de manera constructiva. Trabajaremos conjuntamente, a fin de generar valor para los miembros.

### Asuma la responsabilidad

Asumimos mutuamente la responsabilidad y esperamos que las personas hagan preguntas y planteen inquietudes de manera respetuosa. Dado que el trabajo requiere de equipos y colaboración interdependientes, confiaremos y dependeremos los unos de los otros para ser receptivos y generar valor y servicios de calidad para los grupos de interés.

### Triunfe con integridad

Operamos de manera ética, aportando nuestro tiempo, talentos y conocimientos para avanzar en las comunidades donde trabajamos y vivimos. Nos comprometemos a desarrollar nuestra asociación de maneras que beneficien al entorno y a la sociedad.

# Developing Leaders for the Future

My entire professional career has been dedicated to association management, having worked with healthcare and other associations at the state, national and international levels. I have a passion for association management as a profession, and in ensuring there continues to be a diverse, well-qualified workforce of future leaders for the association community.



**Mitchell Dvorak,  
MS, CAE**

Association Forum Board  
of Directors Chair,  
2019-2020

Executive Director  
International Association  
of Oral and  
Maxillofacial Surgeons

In my view, one of the most important issues facing associations is developing leaders for the future, particularly from under-represented identity groups in the association community. The association community will continue to see over the next few years a great deal of turnover in senior level staff as the Baby Boomer generation retires. Additionally, the demographics of our members and other staff are changing, technology advances have dramatically changed how we communicate and perform our work, and there is overall growth in the size and number of nonprofit organizations.

The convergence of these demographic, social and technological shifts create opportunities for Association Forum to assist in developing a pool of diverse professionals that can fill management positions to avoid a leadership vacuum in the association community.

As part of our efforts to usher in a new generation of association leaders, the Association Forum board approved last year the Emerging Leaders Program, which had an inaugural class of 15 young professionals who are dedicated to advancing their careers in association management. This program complements our existing resources and initiatives aimed at early careerists and future leaders, including the Association Management Essentials Program, the Forty Under 40 Awards and the Women's Executive Forum.

Association Forum believes that diversity and inclusion (D+I) is a valuable asset and source of strength. When an association values differences and creates a welcoming environment—one that is comfortable, inclusive, and empowering—they open the door for innovation, increased participation and an elevated sense of community and belonging for all.

Four years ago, the Association Forum Board adopted a policy statement on diversity and inclusion. In the years since then, we've launched new programs that are directly and strategically linked to D+I.

In 2015, the Association Forum board approved the Welcoming Environment concept. A Welcoming Environment is defined as the creation of a sense of belonging and connectedness that engages individuals in an authentic manner in which uniqueness is valued, respected and supported through opportunities and interaction. To further that message, the board established a Welcoming Environment Committee that is integral to weaving D+I into the fabric of Association Forum. A toolkit, available on the Association Forum website, has also been developed to assist other organizations in creating their own Welcoming Environment. Last year, we introduced the Welcoming Environment Organizational Award as part of our annual Honors Awards.

An exciting new initiative that will be developed over the next year is a national conference on Welcoming Environment that will take place in 2020. This event, building on the success and excitement around the Welcoming Environment Summits, will demonstrate Association Forum's leadership and expertise in D+I to a nationwide audience.

I'm proud to be a part of the association community and grateful to be working in a profession that welcomes and encourages diversity. I look forward serving Association Forum as chair of the board of directors over the next year and working with the staff, volunteers and partners to continue the growth and innovation of the organization.

**Mitchell Dvorak, MS, CAE**

Association Forum Board of Directors Chair,  
2019-2020

Executive Director  
International Association of Oral and  
Maxillofacial Surgeons



# 2019-2020 Association Forum Board of Directors

Association Forum is pleased to introduce its 2019-2020 Board of Directors, which assumed office April 1. Our board represents the wide diversity of organizations that form and support the Chicago-area association community.



## CHAIR

(automatically succeeds from Chair-Elect)  
**Mitchell Dvorak, MS, CAE**  
*Executive Director*  
International Association of Oral and  
Maxillofacial Surgeons



## CHAIR-ELECT

(automatically succeeds from  
Secretary-Treasurer)  
**Geoffrey Brown, CAE**  
*Chief Executive Officer*  
National Association of Personal Financial  
Advisors



## SECRETARY-TREASURER

(one-year term)  
**Paul Pomerantz, FASAE, CAE**  
*Chief Executive Officer*  
American Society of Anesthesiologists



## IMMEDIATE PAST CHAIR

**Lynne Thomas Gordon, CAE**  
*Chief Executive Officer*  
American Association of Orthodontists



## NEW REGULAR BOARD DIRECTORS

(three-year term)  
**Loretta DeLuca, FASAE**  
*CEO*  
DelCor Technology Solutions



(three-year term)  
**Denise Froemming, CAE, CPA, MBA**  
*CEO/EVP*  
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(three-year term)  
**Bob Moore, MA, CAE**  
*Executive Director*  
American College of Osteopathic  
Family Physicians



(one-year term)  
**Matt Sanderson**  
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**Brad Kent, CTA**  
*Senior Vice President/Chief Sales  
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Visit Dallas



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*Chief Operating Officer*  
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## EX-OFFICIO MEMBER

**Michelle I. Mason, FASAE, CAE**  
*President and CEO*  
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*Partner*  
Chicago Law Partners LLC



From 2012 to 2018



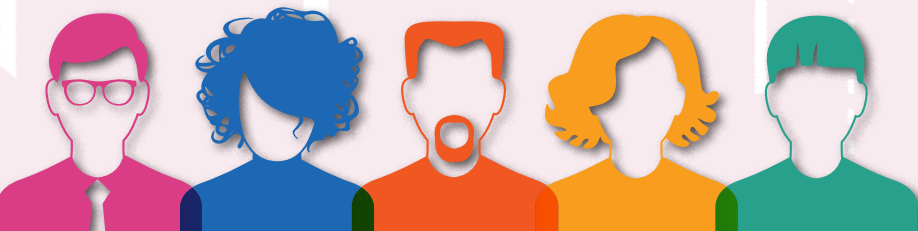
Chicagoland associations and non-profits have grown by more than 4%



\$10.3 billion spent on meetings in the Chicagoland area each year.

Of associations with a staff of 100+, **89%** are AF members

Chicagoland Associations/Non-Profits  
1,725 organizations | 28.7 million members



af | 2019

## Job Function

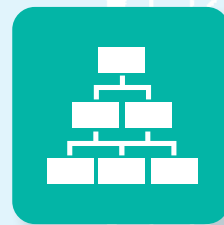


## Top 3 Industries Served

Health care - 35%  
Association Management - 6%  
Libraries - 4%

## Career Level

CEO - 16%  
C-Level - 8%  
Department Director - 25%  
Department Manager - 25%  
Coordinator/Specialist - 26%

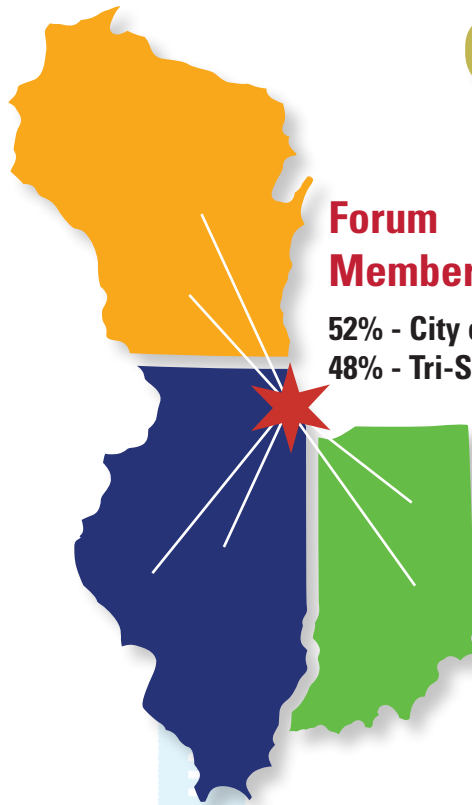




# Community at a Glance

Association Forum Professional Member Organizations **872**

*Includes 366 associations managed by AMCs*



## Forum Membership

52% - City of Chicago  
48% - Tri-State area

**Total Members**  
**>4000**

Individual - 30%  
Forum Plus - 70%  
Forum Plus  
Organizations - 107

69% Female  
31% Male

**Number of Employees**

Average - 62  
Highest - 1000  
Lowest - 1



## Ethnicity

90% Causasian/White  
7% African American/Black  
1% Hispanic/Latino  
1% Asian  
1% Other

*Based on responses of 23% of membership*

**Association Executive/  
Supplier Partner  
Ratio**



Supplier Partner

**1:10**

Association Executives



**82%** are national and international in scope

# Update on Overtime Pay Rules

## Q: What's the current status of the overtime pay rules?

**A:** You may recall that the Department of Labor (DOL) issued a notice of proposed rulemaking in May 2016, in which it attempted to dramatically increase the minimum annual salary level eligible for an exemption from the overtime pay rules (the “salary level test”) from \$23,660 per year to \$47,476 per year—a 100 percent increase. The rule faced stiff opposition from state attorneys general and business groups across the country. On August 31, 2017, a federal court in Texas invalidated the rule on the grounds that it exceeded the DOL’s delegated authority under the Fair Labor Standards Act (FLSA). As a result, the \$23,660 annual exemption level, which has been in place since 2004, remains in effect.

The FLSA requires covered employers to pay employees a minimum wage and, for employees who work more than 40 hours in a week, overtime premium pay at least 1.5 times their regular rate of pay. The FLSA provides several exemptions to those two requirements. In particular, the FLSA exempts “bona fide executive, administrative, and professional” employees from the Act’s minimum wage and overtime requirements. Since 1940, the regulations implementing that “white collar” exemption generally have required three

things: (i) the employee must be paid a predetermined and fixed salary that is not subject to reduction because of variations in the quality or quantity of work performed (the “salary basis test”); (ii) the amount of salary paid must meet a minimum specified amount (the “salary level test”); and (iii) the employee’s job duties must primarily involve executive, administrative, or professional duties as defined by the regulations (the “duties test”).

Last month, the DOL issued a new notice of proposed rulemaking, in which it proposed an increase in the minimum annual salary level to \$35,308, a much more modest increase than that proposed three years ago. Comments on the rulemaking proposal are due by May 21, 2019. If approved, the new “salary level test” will likely take effect in 2020. The DOL estimates that 1.1 million employees currently earn at least \$23,660 but less than \$35,308. Thus, absent some intervening action by their employers, those employees would become eligible to earn 1.5 times their regular pay for any hours about 40 worked per week. In contrast to the 2016 proposal, the current proposal does not provide for future automatic adjustments to the salary threshold.

The proposed rule would allow employers to count nondiscretionary bonuses and incentive payments (including commissions) to satisfy up to ten percent of the standard salary level test, provided such bonuses are paid annually or more


frequently. Further, if, at the end of the annual pay period, the employee’s salary plus nondiscretionary bonuses and incentive payments (including commissions) does not equal the new standard salary level (\$35,308), the employer would have one pay period to make up for the shortfall (up to 10 percent of the standard salary level, or \$3,530.80).

It is important to note that the proposed rule does not amend the “duties test.” Under the duties test, an employee who earns more than the minimum salary level is exempt from the overtime pay requirements if he or she: (i) has a primary duty to perform office work relating to the management of the enterprise, department or subdivision where he/she is employed; (ii) customarily and regularly dictates the work of two or more other employees; (iii) has the authority to hire or fire other employees, or to make meaningful suggestions and recommendations as to the hiring, firing and advancement of other employees; and (iv) has duties that include the exercise of discretion and independent judgement with respect to matters of significance.

In addition to increasing the minimum salary level, the DOL also proposes to revise the salary level necessary to qualify as a “highly compensated employee” (or HCE) from \$100,000 per year to \$147,414 per year. Under the HCE test, office employees who receive at least that specified total annual compensation—the HCE level—are exempt from

the FLSA’s overtime requirements if they customarily and regularly perform at least one (not all) of the exempt duties or responsibilities spelled out under the duties test.

The HCE test is based on the rationale that it is unnecessary to apply the full standard duties test to employees who earn the HCE salary amount annually because such employees “have almost invariably been found to meet all the other requirements of the regulations for exemption.” Thus, the HCE test combines a high compensation requirement with a less-stringent, more-flexible duties test. The DOL estimates that an additional 201,100 current exempt workers could potentially become eligible for overtime under the new increased HCE threshold.

In light of the latest DOL proposal, employers should begin to consider whether their current compensation structures account for the increased salary levels that would trigger an exemption if the proposed overtime pay requirements are finalized. 

This Law Review was written by Timothy A. French 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.



*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.*



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

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# Breaking New Barriers at the Women's Executive Forum

## How Women (and Men) Can Address Gender Disparity


On March 7, 2019, more than 100 female leaders and rising stars participated in the 8th Annual Women's Executive Forum (WEF) at the W Chicago - City Center. The theme for this year was "Extraordinary Women. Breaking New Barriers," and the goal of the planning committee was to provide personal and professional actionable insights.

The opening keynote was delivered by Rita Cook, Midwest region executive, Global Commercial Bank, Bank of America Merrill Lynch, who shared her own leadership ascension story—and some of the corporate policies and cultural practices that are women- and family-friendly at Bank of America Merrill Lynch. The organization has achieved enviable and rare numbers in terms of percentage of women in top leadership roles in relation to percentage in the workforce and population.

The second plenary session featured Tierney Remick, vice chairman and co-leader, board and CEO services at Korn Ferry. She shared highlights from a recent Korn Ferry Research Report, *Women CEOs Speak: Strategies for the Next Generation of Female Executives and How Companies Can Pave the Road*. The survey gathered qualitative data about both the ascension, and blocks, to top management spots. Key learnings included that 65 percent of the female CEOs interviewed did not envision themselves in the top spot until someone else explicitly suggested it, and the critical role of "sponsors," not just "mentors," in advancement. The former talk up and about a person and champion their success in public. The latter are more interpersonal coaches and allies.

Breakout sessions at WEF were held on the topics of negotiation skills, things that women do and/or might do differently to be more successful, personal branding, leadership skills and getting comfortable asking for help in one's career journey.

The closing session was delivered by with Dr. Kathleen T. O'Loughlin, executive director of the American Dental Association, who shared statistics from the medical arena that mirrored some of the stats and experiences in the for-profit world. Dr. O'Loughlin was also presented 2019 Woman of Influence Award on behalf of her ongoing impact and contributions in her field as well to the association community.

Thank you to the Women's Executive Forum Planning Committee: Eileen Murray, CAE, MM, chair, Mona Buckley, MPA, CAE, co-chair and Linda Caradine-Poinsett, PhD, MJ, MBA, Amy Clarke Sievers, Ahren Hoffman, Karen Horting, CAE, Marilyn Jansen, Vicki Loise, CAE, Lorelle R. Swader, CAE, CDF, IOM, Debbie Trueblood, MSW, IOM, CAE, Pauli Undesser, BS, MS, MWS, CAE. 

### Relevant Resources:

Paradigm for Parity Toolkit, [www.paradigm4parity.com](http://www.paradigm4parity.com)

Diversity and Inclusion: Core Values Among Associations, *Vetted Solutions*, [www.vettedsolutions.com](http://www.vettedsolutions.com)

Women CEOs Speak, Korn Ferry, [www.kornferry.com](http://www.kornferry.com)



# Leading by Example

Rita Cook, Midwest region executive, Global Commercial Bank at Bank of America Merrill Lynch delivered the opening keynote at Women's Executive Forum. FORUM spoke with Cook about why support leads to success and how Bank of America gave her the opportunity to pay her success forward to future leaders.

## What is the importance of representation in higher levels of leadership?

You aspire to what you see. If you never see anyone like you in a certain role, you might not be able to imagine yourself there. When I started out in my career more than 20 years ago, I never thought I would be in the position I am now. That was an unconscious reaction to the fact that I didn't see anyone like me in those roles. I aspired to other roles, even leadership roles, but not running a business.

It's fortunate that I work for a company like Bank of America, where half of our worldwide workforce is female. Forty percent of our CEO's direct reports are female. Thirty percent of our board is comprised of diverse individuals. It's not just about the diversity of what you see on the outside. It's diversity of thought background and socio-economic experiences which contribute to a rich, inclusive culture and innovative spirit.

That's the thing about diversity—it's not just a check-the-box exercise. It truly drives better business, because you're thinking differently about situations—about products, service experience and what your customers need. The demographics of the United States are changing. Businesses need to understand who makes up their consumer base. Whether it's retail, financial services or a not-for-profit organization, you need to know the people that you are serving. You can't do that if you don't have diverse representation.

If everyone at an organization thinks in the same way, they're missing out on the wants and needs of huge populations of individuals.

## How can leaders ensure that their employees are being setup for success?

They need to lead by example. When I was offered my current role, I was about to leave on a 16-week maternity leave. I originally said that I would only take 12 weeks, but I was encouraged to take the full 16 weeks. This helped me demonstrate (for women and men) that you can succeed in your career at our company and still have time to have a family, if that's what you choose.

The next year I was up for a sabbatical, which Bank of America provides on anniversary years, and my manager again encouraged me to take the sabbatical—not just because I deserved it but because if I did it, others would feel comfortable taking advantage of these benefits. You need to set an example that women can take their maternity leave or employees can leave early to go see their kids in a play or help coach a softball team.



Diverse representation is important, but it's also important to provide support. Everyone's home life and family dynamics are unique. Leaders must provide you the ability to bring your entire self to work and not feel like you have to sacrifice a part of yourself to get to that role. The culture you're driving is critical to helping employees you're promoting to leadership roles and the teams they are leading are setup to succeed.

## What do you mean by "bringing your whole self to work?"


You operate the best when you can be your authentic self. Studies actually show that if companies create a culture where you can spend time recharging and re-energizing, individuals are able to perform at a higher level. I know we're all connected 24/7, but I've made it

a point to not respond to emails at night. Don't get me wrong, I read them, but unless it's urgent, I might just craft it and hold it until the next morning. Why is that important? The minute I send an email out, somebody's going to send me one back. If they don't have the answer they might have to email three other people for help.

## What are the benefits of having what you called in your keynote a "personal board of directors?"

I have people who I've met throughout my career, both personal and professional, who I can turn to if I want an unfiltered, unbiased opinion. Their only skin in the game is that they've got my best interest at heart. That's my board of directors. They're made up of friends, family members, mentors and colleagues who want to help me succeed. I have people on my "board" who see things differently than I do and have different career paths and experiences. If I only talk to bankers and people in my industry, that's the only lens they're going to provide.

Many companies have formal, structured mentor programs—people who are matched up together and may or may not gel. Another area is sponsorship, which occurs when somebody is your advocate when you're not in the room. People can only sponsor you when they know you and they've seen the work that you have done. Sponsorship may only come when you are doing a good job and there's someone who is willing to attach their name to yours.

Mentors and sponsors aren't there every day and you may talk to them on an infrequent basis, but a board of directors are your everyday people with whom you can be your authentic self and who will be your biggest champions. 



# Closing the Gaps

The closing keynote at the Women's Executive Forum was delivered by Dr. Kathleen T. O'Loughlin, executive director of the American Dental Association. Dr. O'Loughlin is the 2019 Woman of Influence award recipient in recognition of her exceptional achievements and contributions to the association management profession and society.

In her presentation, Dr. O'Loughlin spoke about the major gaps that exists between men and women in business and medical professions. "These are the gaps that we need to do something about if we're intentional," she said. "Once you acknowledge them, you're empowered to take action."

## Earnings

Dr. O'Loughlin pointed to findings from the ADA Health Policy Research Institute demonstrating that found for every dollar a male dentist makes, women, on average, earn 65 cents. While 13 cents of this earnings gap is accounted for by factors such as differences in experience levels, specialty, and hours worked, there still remains 22 cents of earnings differences that remain "unexplained."

The commonly-held thought has been that the wage gap was due to women being less likely to negotiate their salary, but a recent Harvard Business Review study suggested that women ask for raises just as often as men, they just end up getting less. "It could have to do with subliminal bias," said Dr. O'Loughlin. "It could have to do with the way women negotiate." She postulated

that men are less averse to risk, so may be more willing to ask for more money regardless of any potential consequences to reputation or relationship.

The take-home message, according to Dr. O'Loughlin: "You can close the gap. You can benchmark your salaries. You can make sure that every year you're looking at compensation and correcting when you start to see gaps that are unexplained."

The path to closing that gap begins with empowering conversations around salary. As leaders, women can open the conversation during the hiring process by allowing their interviewees to ask the right questions and understand their value.

## Leadership

Dr. O'Loughlin discussed the stereotypes and biases that women face in professional settings. She referenced off-hand comments such as referring to a woman as "the girl from finance," and said that behavior needs to be addressed by standing up to it. "You need to correct it in the moment," she said. "There is a need to not put up with this language. Be a role model for your female staff and show that it is not okay. I think that's a really important message to send."

Additionally, having women in leadership is necessary to be able to understand the needs of ADA's membership, which is becoming increasingly female. By 2030, half of all dentists will be women, which means that the ADA needs to have leadership that represents and mirrors those demographics. To support the need for more diversity in leadership, the association founded ADA Institute for Diversity in Leadership to facilitate a leadership pipeline for underrepresented groups.

Dr. O'Loughlin urged the leaders in the room to celebrate their employees' success—even if it takes them away from their organization. "I'm always kind of happy when somebody leaves ADA and ends up in a better job



at another association,” she said. “We’ve helped them get there. They will sing your praises for the next 30 years. I’ve met some younger talent and they were afraid to tell their supervisor that they’re interested in a different experience, a broader experience. I want my people to stay, but going on an interview will help sharpen their skills and keep them current. If you get a better job somewhere else, then we played a role in helping you succeed.”

### Family Behavior

When it comes to work-life balance, Dr. O’Loughlin made it clear that trying to do it all is a fool’s errand. “Decide where your priorities are,” she said. “You can’t be perfect all day long, so pick the areas where you really need to win and focus your energies there.”

She also advised that women have more a tendency to nurture, support and protect, which are inherently positive qualities, but ones that can

result in a leader doing someone else’s job because they’re not doing it correctly. “Do expect people to perform,” she said. “If you’re doing someone else’s job because they’re not doing it correctly, deal with that situation. Confront it immediately. Make a difficult decision and move on.”

There is still room for empathy and kindness while making those difficult decisions and dismissing someone can be the toughest task for even the most seasoned leader. But Dr O’Loughlin reminded the group that over the course of any career, there are going to be bad days—days where you feel overwhelmed both personally and professionally—and that you can become a little better at balancing your life and having hard conversations by being intentional and seeking training and mentorship in those areas. ☐



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## Innovation and Entrepreneurship in Associations: Case Studies in Value-Creating Breakthroughs

9:45 AM - 12:00 PM

### Moderator:



Sherrif Karamat, CAE  
President & CEO  
PCMA

### Panelists:



Kathleen T. O'Loughlin, DMD  
Executive Director  
American Dental Association  
(ADA)



Todd Shapiro  
President & CEO  
Illinois CPA Society and Foundation



Stephen P. Stahr, CAE  
Chief Executive Officer  
Million Dollar Round Table  
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**Zibby Aman, DES**  
*Sr. Education Manager*  
PCMA



**Cie Armstead, DBA**  
*Director, Diversity & Inclusion*  
American College of Healthcare Executives



**Frank Austin**  
*SVP, Chief Marketing Officer*  
American College of Healthcare Executives



**Matt Braun**  
*VP Client Services and Association*  
*Practice Leader*  
Loyalty Research Center



**Kara Brockman, CAE, DES**  
*Education Manager*  
PCMA



**Kelly Clark, MAMC**  
*Manager for Online Marketing*  
Naylor Association Solutions



**Meena Dayak**  
*VP, Integrated Media & Communications*  
American Public Power Association



**Jeff DeCagna, FRSA, FASAE**  
*Executive Advisor*  
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*Director, ISASS*  
American Academy of Orthopaedic Surgeons



**Jacqueline Price Osafo, MBA, CAE**  
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Water Quality Association



**Debbie Trueblood, MSW, IOM, CAE**  
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Illinois Park and Recreation Association



**Todd Unger**  
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**Chris Vaughan**  
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## General Education Schedule:

**8:20 - 9:30 am**

Opening Keynote Address

**9:45 - 10:45 am**

Purpose, Planning, and People – Bring Your Content Strategy to Life

I Hate Meeting New People But I Know I Need To

Take Back Your Association: Retooling Your Member Experience to Maximize Member Engagement

**10:45 - 11:00 am**

Networking Break: Refresh and Connect

**11:00 am - 12:00 pm**

Welcoming Environment®: Put The WE in your Marketing & Communications!

Association Turn Around, the Next Chapter

Dig-It-All: Engage and Drive Revenue with a Digital Mindset

**12:00 - 1:30 pm**

Lunch

**1:30 - 2:30 pm**

Association Forum Foundation Think Tank

Foresight is The Future of Governing

Membership Reboot: AMA's RX for Growth

**2:45 - 4:00 pm**

Closing General Session

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# Professional Member Research:



By **Charles Cohon**



**A**s I began to assemble the elements of a facilitated strategic planning session for the Manufacturers' Agents National Association (MANA), I believed that the most important ingredient for a strategic planning session to succeed would be the best possible facilitator.

Turns out I was wrong.

Recruiting the best possible facilitator for our association had been crucial, and we had one of the best strategic planning facilitators in the non-profit space. But by the end of our strategic planning session I realized that without professionally-conducted member research, even the best

member arrived with his or her own opinion of where the association should go. How will the destination be chosen?

Will a board member who has the best insight into members' wants and needs set the destination? A board member who is the loudest and most insistent? A board member with the most political

# The Prequel for Strategic Planning



facilitator would struggle to give an association the results that we achieved.

Why?

Our strategic planning facilitator did a brilliant job helping to guide our board on how best to get where the board decided the association needed to go. But it was up to the board to tell the facilitator where the association need to go.

The facilitator's role is not unlike that of a GPS. A GPS can chart the most efficient route to get to the destination you tell it you want to go, but only after you decide where you want to go.

Put yourself in the shoes of a facilitator arriving at a strategic planning session where each board

member arrived with his or her own opinion of where the association should go. How will the destination be chosen?

At best, the facilitator will waste hours of the meeting time convincing board members to give up on products and services that members don't value. At worst, despite the facilitator's best efforts, some ill-chosen products and services will slip through the strategic planning process and continue to drain association resources.

How can associations avoid these potential pitfalls? Professionally-executed member research.

Professionally-executed member research can change the tone of a strategic planning session

“The better your members are prepared before the survey arrives, the better your participation rates will be. I knew our pre-survey outreach program had been a success when a member whose survey didn’t arrive called me and asked to participate.”

from the tumult of contradictory unsupported opinions to a collaborative effort working from an authoritative common body of knowledge.

Working with Matt Braun, vice president of client services, Loyalty Research Center (loyaltyresearch.com) I learned that the key to using professionally-executed member research to optimize a strategic planning is to take these four steps with the board before the session begins:

1. Summarize and distribute survey results.
2. Document the validity and reliability of the survey process.
3. Present credentials of the company conducting the research.
4. Conduct at least one webinar or conference call to explain the research results and answer questions.

These four steps help the board members embrace a research-based common understanding of the direction the association needs to go

“Organizations can fall into a trap,” notes Braun. “Leadership can think they know what members want, but the environment is changing and the dynamics of membership are changing, so we need to collect data to inform leadership what members really need.”

Is a professional research firm a luxury? Couldn’t we just turn over the survey process over to a staffer using online survey tools?

Based on my experience preparing for our strategic planning session, a survey run without survey expertise risks returning erroneous results and would lack the credibility needed for the board to treat the survey results as a common body of knowledge. Braun also explained some of the risks that come from do-it-yourself member surveys:

- Are we asking the right questions?
- Are we asking the questions in the right way (not leading, not loaded)?
- Are we asking the right questions of the right in-

dividuals (are we asking non-meeting attendees to evaluate our meeting?

- Are we using the right response structure to get the most meaningful and actionable results?

Survey design also is crucial, says Braun.

- Does the survey flow appropriately?
- Are there too many open-ended questions back to back that would burn out the respondent mid-survey?
- Did we rotate the response options to avoid survey fatigue?
- Do parts or all of the survey need to be conducted by outbound phone call instead of by email?
- Does the survey need to be a phone conversation to allow follow-up questions like “Why do you say that,” “Give me an example,” or “Tell me a little bit more,”

Having worked with a wide variety of associations over a period of more than twenty years, Loyalty Research was able to not only report our results but compare them to industry benchmarks—average and best-in-class. Relative to other resources we’ve used for benchmarking, Loyalty Research’s results had the proven statistical validity and a direct apples-to-apples comparison in the types of questions we needed.

Preparing the members to receive the survey also is a key element a successful research, says Braun. A survey that arrives unexpectedly may be viewed with suspicion or may be more likely to be ignored. Outreach to members before the survey arrives lets them know the survey is coming, why the survey is being conducted, how their responses will guide the future direction of association, how long the survey will take to complete, and any plans you might have to share the results.

The better your members are prepared before the survey arrives, the better your participation rates will be. I knew our pre-survey outreach

program had been a success when a member whose survey didn't arrive called me and asked to participate.


Having an agreed-upon common body of knowledge detailing what was impactful to our members (and what was not) was crucially important to our very successful strategic planning session. It let our facilitator spend her time helping us decide how to get where the research told us our association needed to go.

Our strategic planning process was tremendously successful. Both a professional research company and highly-skilled facilitator made a huge contribution to that success.

But if I'd only had budget for research or for a facilitator, which one which I have chosen? Research told us where we needed to go, and the facilitator helped us chart a course to get there. If I could

only have one, which would I choose?

- Knowing with certainty the necessary destination, but being left to my own devices to get there, or;
- Uncertainty about the necessary destination, but having expert assistance on routing after one person's opinions about what the destination should be prevailed.

I hope I don't find myself in a situation where I have to choose between the two, but if I ever did, I would invest in research to find out where my association needs to go. 

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**Charles Cohon, CAE**, is the CEO and President of the Manufacturers' Agents National Association. He can be reached at [ccohon@manaonline.org](mailto:ccohon@manaonline.org).

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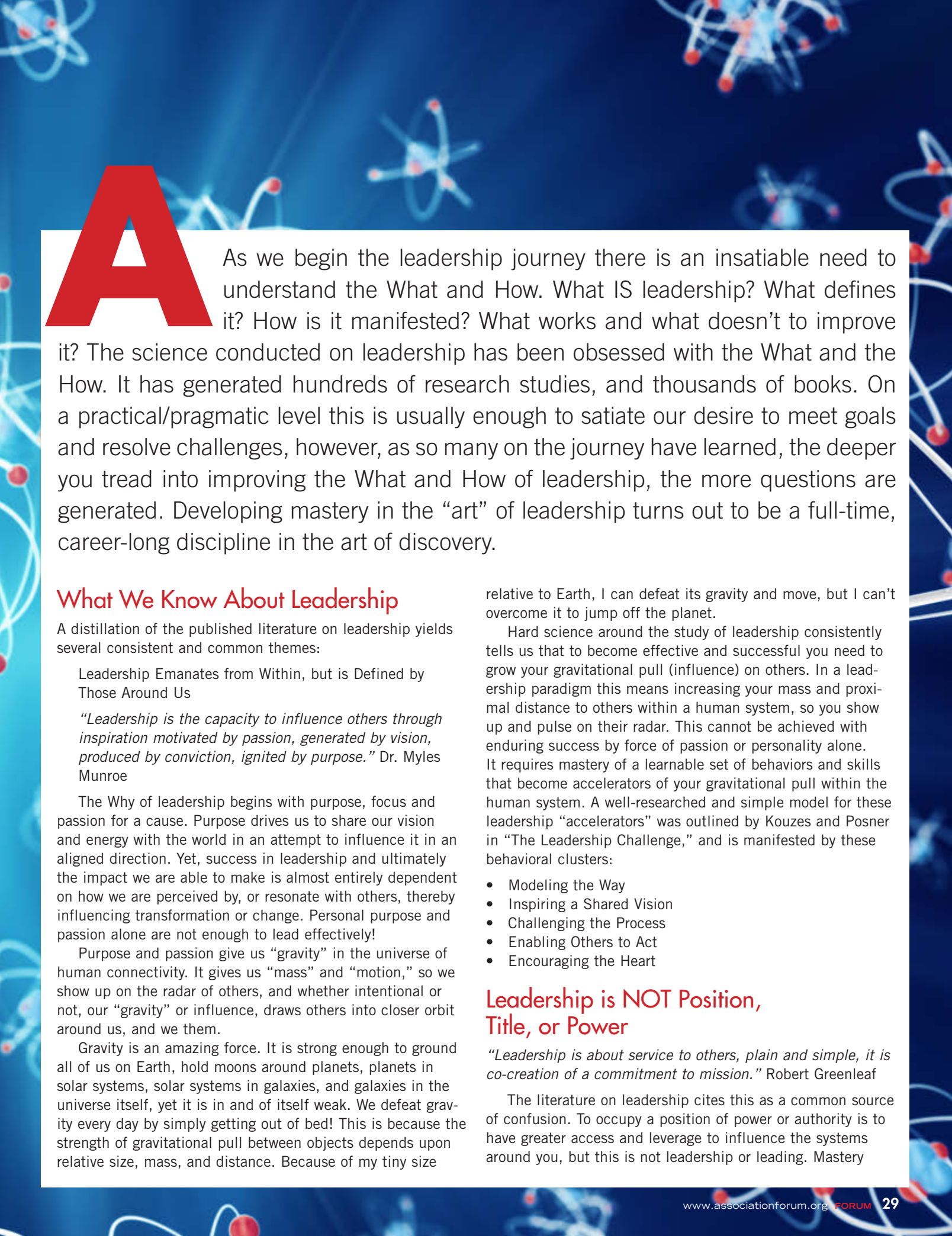
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# The Physics of Leadership

By **Kenneth M. Slaw, PhD**



**A**s we begin the leadership journey there is an insatiable need to understand the What and How. What IS leadership? What defines it? How is it manifested? What works and what doesn't to improve it? The science conducted on leadership has been obsessed with the What and the How. It has generated hundreds of research studies, and thousands of books. On a practical/pragmatic level this is usually enough to satiate our desire to meet goals and resolve challenges, however, as so many on the journey have learned, the deeper you tread into improving the What and How of leadership, the more questions are generated. Developing mastery in the “art” of leadership turns out to be a full-time, career-long discipline in the art of discovery.

## What We Know About Leadership

A distillation of the published literature on leadership yields several consistent and common themes:

Leadership Emanates from Within, but is Defined by Those Around Us

*“Leadership is the capacity to influence others through inspiration motivated by passion, generated by vision, produced by conviction, ignited by purpose.”* Dr. Myles Munroe

The Why of leadership begins with purpose, focus and passion for a cause. Purpose drives us to share our vision and energy with the world in an attempt to influence it in an aligned direction. Yet, success in leadership and ultimately the impact we are able to make is almost entirely dependent on how we are perceived by, or resonate with others, thereby influencing transformation or change. Personal purpose and passion alone are not enough to lead effectively!

Purpose and passion give us “gravity” in the universe of human connectivity. It gives us “mass” and “motion,” so we show up on the radar of others, and whether intentional or not, our “gravity” or influence, draws others into closer orbit around us, and we them.

Gravity is an amazing force. It is strong enough to ground all of us on Earth, hold moons around planets, planets in solar systems, solar systems in galaxies, and galaxies in the universe itself, yet it is in and of itself weak. We defeat gravity every day by simply getting out of bed! This is because the strength of gravitational pull between objects depends upon relative size, mass, and distance. Because of my tiny size

relative to Earth, I can defeat its gravity and move, but I can't overcome it to jump off the planet.

Hard science around the study of leadership consistently tells us that to become effective and successful you need to grow your gravitational pull (influence) on others. In a leadership paradigm this means increasing your mass and proximal distance to others within a human system, so you show up and pulse on their radar. This cannot be achieved with enduring success by force of passion or personality alone. It requires mastery of a learnable set of behaviors and skills that become accelerators of your gravitational pull within the human system. A well-researched and simple model for these leadership “accelerators” was outlined by Kouzes and Posner in “The Leadership Challenge,” and is manifested by these behavioral clusters:

- Modeling the Way
- Inspiring a Shared Vision
- Challenging the Process
- Enabling Others to Act
- Encouraging the Heart

## Leadership is NOT Position, Title, or Power

*“Leadership is about service to others, plain and simple, it is co-creation of a commitment to mission.”* Robert Greenleaf

The literature on leadership cites this as a common source of confusion. To occupy a position of power or authority is to have greater access and leverage to influence the systems around you, but this is not leadership or leading. Mastery

in leadership leverages position, title, and power to inspire the systems themselves to come alive as a source of change or transformation. When power (or one's gravitational pull) becomes too great for the system it occupies, some form of collision is inevitable. As we will see later, sometimes good comes out of such conflict.

## There is No Leadership Without Transformation, Change, and Ultimately, Results

*"Leadership is the ability to step outside the culture to start evolutionary change that is more adaptive."* Edgar Schein

Transformation or change requires a shared vision, a destination, and a collective will to arrive at that destination. It usually needs to be a compelling vision, because to lead change is to create chaos out of order, and then create new order. Thus, it is often said that leaders work LARGE...trying to see the "whole", and the interrelationships and patterns of change rather than snapshots. At the end of the day, however, leaders are measured by whether they "got somewhere," either themselves or with their team or organization. Vision is necessary but not sufficient without arrival at a destination.

Since success in leadership is so dependent on the will of others, relational communication and emotional intelligence are essential skill sets for leaders. Relating and communicating are the currency through which leaders instill passion/purpose, ignite the chance for others to grow and develop, create safe spaces for new systems to form and allow leaders to tap into the roots of human motivation

## Leadership Growth Never Ends

*"Great leaders produce more leaders, not more followers."*  
Ralph Nader

Finally, research tells us that leadership is a learning journey that never ends and cannot be optimized in isolation—we need feedback and support from others because it is only in their eyes that we become effective in leading.

Leadership clearly is about something larger than ourselves. It is about others rather than self, yet the power of leadership clearly emanates from within, and produces external evolution or change. If leadership had a tagline, it would probably be something like:

"People move the world; Leadership moves people."

## The (Astro-Meta) Physics of Leadership

Physics is the science and study of why things work, so is

there a plausible model for the "physics of leadership?" Not yet, only theories that are a lot of fun to think about. I outline one such theory below, not in pursuit of truth, but in pursuit of "stretch," because great discovery is almost always a by-product of pushing traditional or theoretical boundaries. Also, it's just fun.

To truly begin to comprehend the Why of leadership we must accept that to understand leadership is to understand human behavior—to understand people. This is our tagline! "People move the world; leadership moves people." To understand the human "universe," let's call it a "humanoverse", we must explode out our minds and theories to understand the large-scale systems humans create and operate, and the forces that affect them.

The Universe, or potential multiplex of Universes if you believe in that theory, is the largest construct I can hold in mind. One of the more profound moments of my young life came from watching the original TV series "COSMOS" with Carl Sagan. The notions that we are but a "pale blue dot" in the Universe and we, all of us, are "the stuff of stars" touched me at a deep level. Which is the more unnatural thought? We are so unique and isolated we are completely disconnected and "special", or we are part of a much larger system in a web of connectivity?

If it is true that at an atomic, elemental level we are made of exactly the same stuff of stars, how can there not be a connection between the forces at work "out there" and the forces at work "down here?" The same universal forces and laws of physics that apply to the macroverse of galaxies and planets appear to apply to the microverse of atoms and molecules. Perhaps they apply to our Humanoverse as well.

It is a simple thought exercise to begin a stretch toward the Why of leadership. To my friends in science—physicists, astrophysicists, physicians, chemists, engineers, all of whom have suffered my relentless questions—this has become "innocently ignorant but very intriguing," and the fact that we still talk about it means it is at least useful as a thought model.

## The Physics of Leadership

The giants of physics, Newton, Faraday, Planck, Bohr, Schrodinger, Einstein, gifted us the original four forces of physics and their Laws and Principles. As you think about these forces, laws and principles, keep the thought in mind that they bind the physical world together, including us!

Do these laws appear to apply to our understanding of leadership? Strap in for the journey.



## The Universal Forces:

### Gravity

**Characteristics:** Force of binding/bonding that defines the influence and “pull” of one object on another. The formula for increasing gravitational “pull” is increasing mass or closing proximal distance to other objects.

**Leadership Application:** The objects in a human system are people and the equivalent to gravity is “influence”. We increase our gravitational pull or influence in a human system by increasing mass (visibility/impact) and/or proximity to others (bowling alone or on many teams).

### Electromagnetism

**Characteristics:** Force of attraction and repulsion that creates energy and penetrates all living things but exerts no force on the inanimate.

**Leadership Application:** Each person in a human system is emanating energy that is positively or negatively charged and permeates all others in the system. In a complex human system forces of attraction and repulsion are in constant flow as the energy of individuals interact in a complex web. In general, energy that emanates from us, positive and negative, attracts like energy and repulses the opposite.

### Strong and Weak Nuclear Forces

**Characteristics:** The strong nuclear force is the force of order—it is the strongest binding/bonding force—it is the force that holds the nucleus of cells, molecules, and elements together. It is origin of order. The weak nuclear force is the Force of decay—it is the creator of chaos. Strong and weak nuclear forces constantly interact to carry out a complex, symbiotic dance, for which chaos must ultimately win.

**Leadership Application:** Strong and weak nuclear forces define the dynamic interaction of leadership and management in our human systems. We are driven to bring order to chaos through management while leaders seek to explode out new ground destabilizing order and calling for new management. It is the complex, symbiotic dance, of leadership and management for which leadership, innovation, and change... must win.

## Four Laws and Two Principles:

### Law of Gravitation

**Characteristics:** All objects with mass exert a gravitational force upon one another proportional to mass and inversely

related to the square of the distance between them. We all occupy space in the “Humanoverse” exerting our own mass and proximal distance to one another. Every one of us exerts some influence or “gravitational pull” on all others just by our mere presence.

**Leadership Application:** With mass and proximal distance as the key factors influencing the force of gravity there are 3 ways to increase your gravitational pull or influence in a human system:

1. Increase your own mass by increasing your knowledge, skills, and exerting greater energy into the world, thereby becoming a larger force in your own right.
2. Combine your mass with the mass of others.
3. Close the distance between yourself and others.

It is a primary goal of leadership to increase gravitational pull on others because without followers, there is no leadership. But leaders must be wary. The pursuit of influence to accumulate power is perilous. If the gravitational pull, or mass, of one individual, team, community, organization, etc., becomes too large for the space it occupies, it invariably draws in and destroys/absorbs all other components, and often gets destroyed itself in that process. The pursuit is not to become the largest mass in the universe. It is to become the optimal mass to achieve intended purpose.

All human systems eventually settle in a gravitational balance for brief moments of time, but this lasts only as long as it takes for new forces to be introduced that change that gravitational balance. From a leadership perspective think of your team, department, organization, community as a “gravitational field”. Every change of larger and smaller masses in and out of the field creates new need and opportunity to rebalance or reposition the field. This the work of leadership...to optimize the field.

### Law of Motion

**Characteristics:**

1. All objects remain at rest or in uniform motion until changed by an external force.
2. The rate of change is proportional to the force applied.
3. For every action, there is an equal and opposite reaction.

**Leadership Application:** The Laws of motion have a lot to say about why change is so hard for people and the systems we create? The natural order of everything is to devolve into chaos. The natural order and drive of human systems is to make sense of chaos and bring it back into understandable order.

Once settled into a known orbit, people are extremely

happy remaining in uniform motion, even if not optimal, as order is the preferred state over inviting chaos. The more people feel in balance and remain in uniform motion, the greater the force, spark, or energy required to initiate transformation or change. And as we all know and experience, for every action required to spark change you must expect an equal and opposite reaction.

When the spark of change builds enough momentum to exceed its opposite reaction, change has an exponentially greater chance to take hold. From a leadership perspective it is important to assess readiness for change and contemplate both direct and indirect consequences of your action on the motion of those who will be influenced most by change.

### ***Law of Thermodynamics***

**Characteristics:** The natural order of all systems, including the Universe, is to seek entropy (chaos). If enough force can be applied and sustained, entropy can be contained and controlled. If not, there is no stopping the system from reaching its ultimate end state.

**Leadership Application:** This is a very important, but very difficult concept for leaders to internalize. It is critical to have vision, passion, and purpose, and believe in it, but not to the exclusion of accepting feedback and experience to perfect it! Often leaders get dug in on their vision and their ideas and fail to see imperfections that those around them see clearly. The law of thermodynamics tells us that even if you have the perfect vision or idea, it is perfect for only a moment in time, and while the conditions that make it perfect exist and can be tightly controlled, it is not easy to sustain in a human system constantly changing.

The more a leader exerts control the more the organization or system is cut off from its core creative force. Many leaders have commented that leading an organization is like mastering the optimal grip on a golf club, controlled but loose.

### ***Law of Conservation of Energy***

**Characteristics:** All mass and energy in the Universe remains constant and is conserved, it merely changes from one form to another:  $E=MC^2$

**Leadership Application:** Of all the applications to leadership in this model I think this may be amongst the most important to the work that we do in associations. All mass and energy, that means thoughts, ideas, movements, initiatives, are conserved. Just because you or your organization say “no”, the energy or idea from a member or group of members, or an outside group, is not extinguished. Ideas and energy do not die if you deny them a portal...they seek another, often with

even greater strength. You have likely experienced this repeatedly. A group wants to form a SIG, or Committee, or Section or Chapter, or wants to achieve an initiative. You say “no” and a year later a new organization or a new initiative springs up within a major competitor who said “yes.”

The law of conservation of energy teaches us as leaders to become transformational agents to sustain success. We have finite resources, true, and every idea is not a good idea or an implementable idea. But rather than saying “no”, try to honor the intent and purpose behind the idea, and harness the energy by converting it to another useable form.

Great leaders are the great alchemists of our profession. We are often taking raw material into the lab and figuring out how to spin gold.

Think large and absorb all the aligned and positive energy you can. Harness it, channel it, transform it. Let the dark energy go.

### ***Principle of Relativity***

**Characteristics:**

1. The laws of physics apply to all objects in the Universe (as long as the speed of light is proven to be a constant).
2. Reality is defined by the perspective of the perceiver, thus there can be multiple realities occurring simultaneously.

**Leadership Application:** Einstein proved to us all that “reality” is defined by the person experiencing it. What we experience on earth and what an astronaut experiences from space are very different even when we experience the same thing at the same time. Every person in a system is experiencing reality uniquely.

It is one of the key functions of leadership to align realities around common destination or outcomes. This comes into play every day with communication. How many times each day do conflicts occur because two people hear exactly the same message from the same source at the same time yet come away with completely different messages? How often do you hear people say, “That is not the message I sent you”, and the other is saying “Well, that is the message I received.” The message “received” is the message sent, it is all “relative” to the way we filter the world.

Great leaders are great communicators not because of their message, but because they think a lot about the audience receiving their message.

The principle of relativity forces leaders to consider that there are always multiple perspectives to consider, and the more you can see the greater “whole”, the clearer the optimal path becomes. When you are problem solving get large, take multiple perspectives, and you are more likely to make wise choices.

## Principle of Quantum

### Characteristics:

1. Everything in the Universe when broken down to its elemental state ends up particles of pure energy;
2. All forms of energy appear to have a predictable wave form, and an unpredictable particle form;
3. We know how many protons, neutrons and electrons exist in every element, we have no idea where these particles will be at any given moment, and it appears they can be in multiple places simultaneously

**Leadership Application:** I think quantum theory is awesome and it is an essential component of a “theory of everything” in leadership. Part of the reason we can even have this discussion is that quantum theory provides the underpinning of it all.

We are the stuff of stars. At the atomic and sub-atomic level, we are composed of pure energy, nothing more-nothing less, and that pure energy has formed itself into matter and substance that became...us. Each of us is composed of energy and we emit energy in multiple forms...physical (gravity/electromagnetic), thought (waves and particles). It explains why we do experience a sense of gravity between us, attractive and repulsive energy fields, how like energy between people combines and synergizes so easily, and why at the end of the day, we all seek as much freedom as possible, because that is the natural state of the energy that comprises us...to be free.

Quantum theory, like relativity, also challenges us to accept multiple realities and to understand that what is known is a very small fraction of what there is to be known. You can reach down and touch your arm, yet the electrons that make up the atoms in your arm may not really be there at all or may be in two places at the same time.

People move the world; Leadership moves people. This works because of quantum physics. We are all connected.

## The Path to Leadership Mastery in the Humanoverse

Whether they know it or not, the role models, mentors, teachers and colleagues that you have always looked up to as leaders have been on a path to mastery in the “physics of leadership”. These leaders:

- Understand their higher purpose and align to it when they emit energy into the world;
- Preserve and strengthen their character and credibility at all costs, and understand it is the only thing worth dying for;


- Develop the largest, widest, view they can and constantly check their position against what matters in the big picture;
- Understand that the energy (positive or negative) they put out into the universe lives forever and has consequences;
- Honor the energy of others and try to align or transform it to common outcomes;
- Understand people do not resist change, they resist being forced to change. They reach people with common vision and purpose, ask for their help, give them the space to help, let go, accept periods of increased entropy and chaos as a predecessor of change and transformation;
- Constantly learn, listen to others and seek feedback.

## Toward a Theory of Everything in Leadership

Thanks for taking this little journey with me. I have tried very hard to kill this theory and shoot holes through it, but so far, it endures. Almost every single day I am reminded of one or more of these laws or principles in a typical day at the office. I think about the law of conservation of energy as I watch people interact. I have experienced someone sit at my desk and watched their energy transform from solid, to liquid, to gas, to plasma in 15 minutes! Same person, same energy, just taking different forms.

We are all the same at a foundational level, yet we all have different constructs and abilities that place us at different points within a system. We tend to “gravitate” to a place we find comfortable or that energizes us. We cluster into “constellations” like stars and galaxies. We find a happy place, but it is never long before change forces discomfort and no matter how much force we bring to bear on maintaining status quo, we know somehow that entropy will win.

Leadership itself is a “force” that attempts to influence this human system. It catalyzes transformation of matter to different states creating change. It is especially potent and powerful when it serves a meaningful purpose. The “nucleus” of leadership, its protons and neutrons, are credibility and character. At the end of the day, all “matter” in the Universe, or Humanoverse, matters.

Successful leaders have a near insatiable hunger for learning. Perhaps that is why we often look to the stars to find answers. 

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# What CLOs Want Their CEOs to Know

**Tracy King,  
MA, CAE**

*CEO & Chief  
Learning Strategist  
Inspired*



By Tracy King, MA, CAE

As CEO & Chief Learning Strategist of Inspired, Tracy King leverages her more than 20 years in the industry consulting with organizations on education strategy and learning design. Tracy is the author of *Competitive Advantage*, and she advises associations on growing reliably profitable and sustainable CE programs that transform learners. Tracy specializes in the intersection of learning science and technology; her instructional design team produces engaging, inclusive, and transformational learning experiences. She's a thought leader, invited speaker, master strategist, award winning learning designer and DELP Scholar.



orkforce disruptions challenge the way we do business—and chief learning officers are playing a greater strategic role in a rapidly evolving environment to ensure their workforce can perform today and prepare for future requirements.

These shifts signal both new learning needs and updated demands for delivery. They also necessitate a new awareness that the players serving the continuing education market are more diverse and more sophisticated than ever before.

CEOs, here's what CLOs want you to know.

### Academic institutions are growing their CE role through strategic partnerships.

Continuing education and extension programs are not new mechanisms for colleges and universities, but academic institutions are experimenting with growing their reach and revenue with technology and corporate partnerships.

Considering Edison created a thousand prototypes before his lightbulb breakthrough, massive open online courses (MOOCs) have made a profound turnaround from boring and disappointing to disrupting the terminal degree. Georgia Tech and Udacity first partnered in 2013 to deliver a master's degree in computer science. Fall of 2018, edX announced nine new MOOC-based master's programs with esteemed university partners. And in classic MOOC style, learners can set their own pace, pay considerably less, and often audit for free learning with renown faculty.

But those are just the degree-based programs.

Academic institutions are increasingly negotiating partnerships with corporations to leverage their subject expertise, instructional design teams, and accreditation powers for custom training solutions and credentials to meet corporate partner's business objectives. Not just one-off projects, but long-term collaborative partnerships. Grow with Google has designed a modularized IT curriculum to prepare qualified entry level professionals that's now accredited by 25 institutions. Another common example,

Wells Fargo has partnered with St. Catherine University on a leadership certificate program to enhance leadership capacity without the demands of degree requirements.

What does this mean for association education?

Academic institutions are seeking to develop alternative routes to pipeline development and continuing education through strategic partnerships. Associations should be a part of those conversations. Part of those partnerships. When scanning our own learning portfolio, are there course or certificate programs that could be customized and licensed to corporations? Can we envision a role for ourselves collaborating.

### Corporate workplace learning budgets are increasing to close skill gaps with in-time learning.

The corporate training industry is tipping over 160 Billion in North America and more than 355 Billion worldwide. Annual surveys show budgets are increasing, trending toward eLearning, and investing in technology that facilitates social, micro, mobile, self-directed learning available at the point of need. The McKinsey Global Institute Report flags that 62 percent of corporate executives consider retraining and upskilling their workforce an urgent business priority to address skill gaps, automation, and the accelerating pace of transformation rippling throughout the entire enterprise.

Meanwhile, there's a realization that formal learning comprises a much smaller percentage of overall professional development—and frankly, working adults just don't have a lot of time to pause for new skill development. Bersin by Deloitte approximates 24 minutes per week is all that remains for workers to focus on training and development.



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“The fact that learning is a process and not an event is a sobering thought for associations who rely on event-based education, whether that be a conference, course or webinar. We’ve got to consider what role we want to play in formal learning and informal in-time learning opportunities.”

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But increasing the training budget comes with new expectations and accountability. Training programs and external PD budgets must now be aligned with business objectives. And we can’t be satisfied with butts-in-seats or eLearning completion as indicators we’ve met our objectives. Training departments are increasingly accountable to measure skill gaps are closing, best practices are being transferred to practice, and reinforcement is available to improve performance.

Which means training can no longer be an event. It’s continuous.

The conversation in workplace learning now is how to integrate work and learning. Learning and working are no longer sequential, so worker-learners require a new paradigm to upskill, reskill, and prepare for a future where their current job may be radically overhauled by technology. They don’t have time to sift through all of the information on a topic or invest in info-loaded programs; adult learners desire high quality consumable bites for in-time “I need help now” situations as well as access to skill development learning experiences for building competency.

What does this mean for association education?

The fact that learning is a process and not an event is a sobering thought for associations who rely on event-based education, whether that be a conference, course or webinar. We’ve got to consider what role we want to play in formal learning and informal in-time learning opportunities. This means investing in the types of learning design and technologies that deliver results – knowledge, skill, and application. What would it look like for us to differentiate information-based programming from true learning addressing skill

gaps? And how could we develop a relationship with members by delivering content over time, allowing us to reach into their context of application?

### Learning technology companies are now in the content and credentialing business.

Learning management systems have evolved from serving as a content database to a learning content authoring and delivery platform to a learning pond stocked with fish, or in this case, courses and micro-credentials. Like Degreed.

Kelly Palmer and David Blake, authors of *The Expertise Economy*, and executive team members of Degreed, rightly point out information is rarely the key to resolving skill gaps and workplace issues. Knowing something doesn’t mean you can do it, so we must attend to what will: progressive (stacked) competency development.

So what does Degreed offer?

Individuals can create an account and get certified in 1500 different skills. They have created pathways to demonstratable, and portable, expertise. But they’re so much more than a professional development site, Degreed integrates with a business’ LMS to offer these stacked skill development programs, benchmark team skill-sets and achievements, and formerly certify expertise. Not the letters after one’s name credential, but similar to the digital badge proof-of-competency that employers want in their teams and individuals can assemble in their professional portfolio.

What does this mean for association education?

We’ve been talking about digital badging,



stackable skill-based learning, and mastery progression in programs for years in association circles. Now this technology is available and accessible to both individuals and businesses. What role do we want to claim in this? How we will respond to professionals' need to not only develop skill but prove it? How can we align our program offerings to craft pathways to mastery? Are we willing to map the knowledge and skill progression for core competency areas within our industry so we can create a meaningful stacked curriculum to meet learners where they are and develop an ongoing relationship with them through our learning programs?

### Associations are poised to lead or concede.

This is not a meetings issue or marketing issue, this is an association management issue. Learning is on the leading edge of what's required to advance workforces. But it can't just be curated, committee selected or repurposed. It must be purposeful. It must be designed to offer pathways to mastery. It must be both formal in at the point of need. Because workforce disruptions signal both new learning needs and updated demands for delivery.

What does this mean for association education?

The new value proposition in continuing education is transformation. Just administering events is no longer the solution that fits the need in a market that expects real world outcomes. If education is central to our mission and value proposition, and if we're concerned about market competition, this is a strategic level concern. Advancing the industries we represent is both a mission and a strategic learning imperative. It requires we seek strategic partnerships to cultivate a qualified pipeline and to consider our role in anytime-learning as professionals seek options for continuous shallow and deeper steps toward mastery. And it requires we decide whether we are going to back our promise of education programming with learning design that facilitates results professionals and employers are eager to pay for. We can choose to lead, or to concede that we'll manage our corner of the workforce development.

Choose to lead. 

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Tracy King, MA, CAE is the CEO and chief learning strategist for InspirEd. For more information visit [www.inspired-ed.com](http://www.inspired-ed.com).

***Tracy will be facilitating two upcoming Association Forum sessions:***

**May 15: Learning Experience Design Essentials**

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# The Untouchables: Examining Your Organization's Sacred Cows

**Stephanie Taylor**

*Senior Director, Education  
and Academic Radiology  
Radiological Society of North America*



**Kevin Mayeux, CAE**

*Chief Executive Officer  
National Association of  
Insurance and Financial Advisors*



**Lise' A. Puckorius**

*Chief Executive Officer  
OLC Education &  
Conference Center*



**Robert T. Rupp**

*Executive Director  
DuPage County Bar  
Association*



**Greg Dummer**

*Chief Executive Officer  
American Orthopaedic Society  
for Sports Medicine (AOSSM)*



By **Mary Ann Passi, CAE**

**E**very organization has programs/services that have outlived their purpose or their usefulness—the so-called ‘sacred cows.’ Often, staff leaders know these need to end or change long before volunteer leadership realize or agree with this reality. FORUM spoke to a variety of association professionals to ask about the existence of these ‘sacred cows’ in their organizations and if/how you conquer them. These executives faced issues that ranged from several years in the making to several decades of history to an outdated structure more than a century old. Here’s how they handled these types of situations in their organizations.

### Has your organization taken on any sacred cows and if so, how did it happen?

Stephanie Taylor shared that the Association of University Radiologists’ longstanding annual awards banquet had decreasing attendance and was not supported by younger members. It took leaders about five years to definitively determine that they needed a new mechanism for award recognition. The decision was survey and data-driven, so while not a significant time investment, she needed data so volunteer leaders could more easily make a decision.

Lise’ A. Puckorius, CEO of the OLC Education and Conference Center told FORUM that while their organization didn’t kill a sacred cow in the traditional sense, they did shift direction to sustain the OLC mission. Part of the original AAOS headquarters building, the OLC Center was designed to train orthopedic surgeons to improve patient care. Their board later designed a state-of-the-art facility in the new AAOS headquarters building. While the primary focus remained on improving patient care, they then expanded the mission: To provide an accessible world-class forum for meetings and education. Working with an outside consulting firm, the board designed the new space. Through that process, they knew they had to be more strategic, using the consulting firm to provide additional insight on what strategic adjustments were needed to be successful. The board embraced the consultants’ suggested changes.

Robert Rupp, executive director of the DuPage County Bar Association, reported that for the first time in 26 years, DCBA would not hold an annual all-day, in person CLE (educational programming) conference. While concern over performance had been discussed for five years, when the time came to decide, the conclusion was made quickly.

Kevin Mayeux, CAE, chief executive officer with the National Association of Insurance and Financial Advisors, shared that they had slain “probably the most sacred one of them all—our bottom-up structure with approximately 550 independent local associations, 50 independent state associations, and the national association which was controlled by voting delegates from these state and local groups. This tremendous effort took more than two years, but the membership bought into a new, nimble structure that is poised to address the needs of today’s members and take us into our next 100 years ready to tackle the problems and issues that lie ahead.”

### How did your organization’s leadership tackle this decision?

Each organization actively built cases to aid volunteers’ decisions. Taylor used a mixture of attendance data, membership survey feedback, ROI and an invested leader to own the decision in convincing leaders to stop holding their annual banquet. Puckorius leads staff efforts to provide a strategic business plan for any decisions brought to the board which includes the ROI. The organization measures ROI on the long-term impact for the member organizations represented at the table and the impact on patient care.

Rupp said DCBA’s board made the ultimate decision, after reviewing the need for the event in light of the mounting annual loss from delivering it. NAIFA’s Mayeux formed a strategic planning group that met over several months. “The task force, representing a broad cross-section of our federation leadership, had some frank conversations and was willing to lay everything on the line in order to better ensure long-term success,” said Rupp. “We then had a half dozen webinar ‘town hall’ meetings and several public comment periods before finalizing the plan.”



## How often does your organization review 'sacred cows' for relevancy?

Many organizations commonly only review these programs when there's been a shift, such as an attendance or financial drop. Others incorporate ROI as part of the budget process or the staff team brings the program to the attention of volunteer leaders at least annually. Uniquely, the National Association of Insurance and Financial Advisors approaches it as a regular course of business, slating a strategic conversation at each board meeting, setting aside one meeting a year for a deeper strategic dive.

"All our products and services are evaluated regularly, sometimes annually as part of the budget development cycle or as post-analyses and sometimes on an ongoing basis from day—today, week-to-week or month-to-month," said Greg Dummer, CEO for the American Orthopaedic Society for Sports Medicine (AOSSM) "Metrics are established in advance and used to quantify our performance. These metrics may

include financial objectives; participation goals, such as memberships, online traffic or event registrations; and member and market survey ratings. We compare available data with expectations, past performance and competitive factors, but numbers alone do not always paint an accurate picture."

## How did you present your case and what tools/resources/strategies did you use?

These association professionals used various methods to present their cases for change. They also faced different decision-making horizons ranging from an hour to years, depending on the organization and how they routinely conduct business.

Puckorius shared that "[The OLC board] used an outside consulting firm to look at the business model and their review of day to day operations led them to recommend the addition of a CEO focused on growing the business and improving day to day operations. The previous facility was managed by an orthopedic nurse who had extensive knowledge of what was needed in a bio-skills lab versus an educational conference center." OLC's board bases decisions on the impact on both patient care and the facility, not hesitating to move ahead strategically.

DCBA's Robert Rupp explained, "The simple demonstration of fiscal loss year over year was clear and easy to explain. The successful two-year shift toward different delivery mechanisms for CLE programs and the growth in the number of those programs throughout the year also provided good comfort that member needs were being met in other ways." DCBA leaders were concerned for at least five years before the 'unspoken' was finally said. After leaders heard, "We don't need this anymore," the decision was made in an hour.

To ensure success, Mayeux and NAIFA used a broader approach, taking two years of discussion and promoting the idea across 550 local and 50 state associations to effect change.

Dummer shared that, at AOSSM, they take a long-term view that requires understanding Return on Objective (ROO) goals as well as Return on Investment (ROI) goals. "Our mission is education, and with respect to this mission, we sometimes have rational reasons to support financial loss-leaders," he adds. When we decide

## What constitutes a 'sacred cow' for your organization?

With variations on a theme—not being able to change something within their organizations—each professional explained the nuance for their association:

- **Taylor:** A sacred cow is something so ingrained in an organization that the thought of changing or eliminating it is taboo.
- **Rupp:** Something that occurs year after year, often instituted by an honored past leader, almost unquestioned and without significant deliberation on need or return.
- **Mayeux:** Something that many view as a traditional program that we can't do without. We have come to realize that any program has a life cycle, and they need to be refreshed, retired or reengineered in order to remain relevant in our changing world.
- **Puckorius** shared that OLC does not have traditional sacred cows as it has neither membership nor enduring materials. "The mission stems around managing the physical plant as well as the execution of all the meetings and educational events for those outside of orthopaedic." While OLC's board was previously very involved in day-to-day operations, they are now committed to supporting the staff's management of daily operations while they focus on strategic relationships to further the organization's mission.

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**"It is important to challenge the sacred cows from a strategic or business perspective and find champions in the elected leadership. It is also important to understand why they are sacred cows."**

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to sunset or significantly re-engineer a program, factors for consideration include program attractiveness, alternative options and competitive position. Metrics typically help us justify our decisions, but bigger picture goals and aspirations always inform the process."

## How did you build and present your case?

While Taylor leveraged a future leader to build the case, she presented it as the organization's executive. Puckorius used the outside consultants OLC engaged as they were knowledgeable about orthopedic specialty societies. Volunteer leaders therefore valued their input and recommendations.

Rupp used the DCBA Board of Directors and CLE Committee. He expanded, "Member involvement in the program had fallen so far, a general outreach to membership was not pursued. I made the pitch and our current president was brave enough to make the jump on his watch without standing in the way."

At NAIFA, Mayeux used a broad cross-section of leadership—national, state and local volunteer leaders, as well as national, state and local staff. They focused on diversity in terms of age, gender and racial/ethnic background to ensure member interests were best represented. "Always let the volunteers lead and be the public face," he recommends. "As CEO, I re-emphasized their message in a different way through publications, blog posts, social media and main stage presentations—and did so in terms of change being a requirement and having a bold vision for the future."

## Did your organization ultimately 'kill' the program, or has it evolved into something new?

While only the Association of University Radiologists actually stopped their traditional banquet, most other organizations evolved into something new. OLC's business model evolved, accomplishing their goal of being a more strategically-led organization. DCBA reviewed what they were routinely doing, allowing them to acknowledge the shrinking time all stakeholders in the educational programming process have to devote to planning, hosting and attending such activities. As a result, they changed their approach, now offering short in-person and online programs throughout the year. NAIFA evolved


an outdated, historical structure to better reflect changing dynamics and their current members.

## Any tips for other association execs facing such a challenge?

**Taylor:** It is important to challenge the sacred cows from a strategic or business perspective and find champions in the elected leadership. It is also important to understand why they are sacred cows. I wish our organization used a matrix map exercise to assess and determine priorities.

**Puckorius:** You need to stay focused on the mission of your organization. It is the association executive's responsibility to manage the business of the organization so that the mission moves forward. The executive is also responsible for guiding the volunteers through tough times. It is imperative to remember that the leaders are volunteers. An organization success depends on strong leaders in both the staff positions and the volunteer leader role. A pipeline of passionate strong volunteers driven by the mission of the organization is essential. I do strongly recommend that every paid staff leader should network with their peers to assist with those challenging issues! Networking is key!

**Rupp:** Work with your elected leadership to calm their fears that eliminating a sacred cow will somehow mar their legacy. Some noses will always be out of joint, but leaving a healthier organization providing a better service is a far greater legacy than kicking the decision-making can down the road for his or her successor.

**Mayeux:** It takes time, patience and tenacity. Work in collaboration with your volunteers. Let them be the face and voice of the change and be there to back them up. 

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Cook and Kocher Insurance Group	<a href="http://www.cookandkocher.com">www.cookandkocher.com</a>	3
eShow	<a href="http://www.goeshow.com">www.goeshow.com</a>	Inside Back Cover
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# FRAME UP A *New Perspective*

September 15, 1:15 pm  
**AMERICAN VISIONARY ART MUSEUM**

When Wade Marcus found out his next trade show was in Baltimore, his wife Sasha asked if she could come along. While he worked the expo floor, she explored the city's unparalleled art scene — but saved one adventure for them to share together. On their last afternoon in Charm City, they toured a place that Sasha heard locals describe as out of the ordinary. But after getting a close look, they both realized it was really out of this world.

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## May 2019

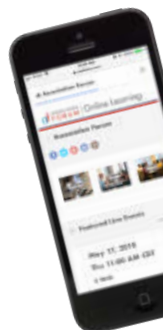
- MAY 1** **Executive Roundtable: Cybersecurity (In Partnership with the National Association of Manufacturers)**  
1 p.m. – 5 p.m.
- MAY 9** **Welcoming Environment Conversation Circle**  
9 a.m. – 10 a.m.
- MAY 15** **Learning Experience Design Essentials**  
9 a.m. – 12 p.m.  
*Explore several common 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.
- MAY 23** **Book Publishers Conversation Circle**  
9 a.m. – 10 a.m.

## June 2019

- JUNE 6** **Webinar: Leading Learning Innovation**  
11 a.m. – 12 p.m.
- JUNE 19** **Forum Forward**  
8:20 a.m. – 4 p.m.
- JUNE 19** **Emerging Leaders Program**  
8 a.m. – 4 p.m.  
*The Emerging Leaders program is a six-month program designed for young professionals looking to take the next steps to success using in-person and online training.*
- DEC 17**
- JUNE 19** **Association 101 (Co-located at Forum Forward)**  
8:20 a.m. – 4 p.m.
- JUNE 27** **Lippman Connects: Exhibit Sales Roundtable**  
8:00 a.m. – 4:30 p.m.  
*Exhibit Sales Roundtable (ESR) is a one-day facilitated workshop for executives, managers and professionals responsible for maximizing exhibit and sponsorship sales. ESR creates a high-energy environment for exploring exclusive research, exchanging field-tested sales tactics, and creating career contacts with a small group of forward-thinking peers. A select group of executives, managers and professionals network and learn through guided discussion and information sharing.*

## 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.



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[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.



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**Paul Pomerantz, FASAE, CAE**  
CEO  
American Society  
of Anesthesiologists

### Association Industry Meeting Metrics (AIMM) Founding Partners





## Promotions and Changes



**Elaine Weiss, JD**, has been named executive director of the Society of Thoracic Surgeons (STS). Weiss has held leadership positions in the association industry, including CEO of the Illinois CPA Society, associate executive director of the American Bar Association and most recently the executive director and chief executive officer of the American Academy of Dermatology. In 1993, she was appointed by President Bill Clinton to serve as Midwest regional director of the United States Department of Health & Human Services. Weiss has served on a multitude of Association Forum Committees, most notably as chair of the board of directors for 2011-12.



**Roberta Tisdul, CMP**, has been promoted to director of convention services

for Visit Indy. She has been with the organization for more than a decade, initially joining the organization as an assistant and most recently serving as senior manager of convention services. Tisdul attended the University of Evansville and earned her Event Management Certificate at Indiana University Purdue University Indianapolis' Tourism, Conventions and Event Management (TCEM) Program.



**Jane James** has joined Visit Indy as a sales coordinator. James previously spent

15 years at the Omni Severin, where she held positions in sales and catering, guest services and most recently as executive assistant to the general manager. She is a graduate of Xavier University.



The National Safety Council (NSC) has hired **Vanessa Mobley, CMP**, as senior

manager for meetings and events. Prior to joining NSC, Mobley was senior meetings manager at the Association Management Center. She holds a bachelor's degree in political science from Ball State University.



**Julie Elfland, CMP**, has been promoted to senior director of meetings and

expositions at Bostrom. Elfland has been with the organization for more than 20 years, transitioning to meeting planning after beginning her career in the hotel catering convention services field. She serves on the Sonesta Meeting Planner Advisory Council.

## News and Awards



**Rupa Brosseau** has been named a 2019 Young & Aspiring Professional by Association Trends. Brosseau is

the director of the Foundation

for Anesthesia and Research (FAER), a related organization of the American Society of Anesthesiologists. Brosseau has served on multiple Association Forum committees, including the Foundation Advisory Committee and the Editorial Working Group, and was a 2015 Forty Under 40 Award recipient.



**Mary Kate Cunningham, CAE**, has been named a 2019 Leading Association Lobbyist by Association Trends.

Cunningham serves as the vice president of public policy at the American Society of Association Executives (ASAE), where she oversees the organization's advocacy efforts. She is a member of the Tax Coalition and the Truman National Security Project and previously worked for the House Armed Services Committee.



**Kenneth Luurs, CAE**, has been approved by the Association Forum board of

directors for a lifetime membership. Luurs was chair of the Association Forum board in 2003-04 and has served as chair of several of the organization's committees while a member. Over his career, he was CEO of the American Society for Blood and Marrow Transplantation (ASBMT) and the National Association of Bond Lawyers (NABL), as well as managing director for NetCord. He has held senior positions with the American Society for Clinical Pathology (ASCP) and the American Bar Association (ABA). He and his wife Carol reside in Oak Park.

The American Society of Association Executives (ASAE) has announced its **2019 Class of Fellows**. The Fellows program recognizes individual accomplishments and contributions to ASAE and the association sector, and it is a call to service for the profession.

**Lou DiGioia, MBA, CAE**

Former Executive Director  
Distributive Education Clubs  
of America (DECA)

**Charlie Jones, CAE**

Senior Vice President, Global  
Brand Management  
Futures Industry Association

**Michelle Mills Clement, MNM, CAE**

President & CEO  
Chicago Association  
of Realtors

**Suzanne C. Pine, CAE**

Vice President Professional  
Development  
Association Headquarters Inc  
AMC National Accounts  
Philadelphia Convention and  
Visitors Bureau

**Steven J. Stout, CAE**

Executive Director  
Texas Society of Association  
Executives

**Irving W. Washington III, CAE**

Executive Director  
Online News Association

## New AF Members

### *Individual Members*

**Rajeev Brown**, San Diego Tourism Authority

**Melissa Lynn Burkholder**, Illinois State Bar Association

**Bradley Elliott**, American College of Surgeons

**LaChelle Evans**, Visit Frisco

**Amanda Gustafson**, Convention Data Services

**Jon Hockman**, McKinley Advisors

**Kelly Kumzi**, Langham Hotels International

**Melissa Lagowski**, Big Buzz Idea Group

**Kristin McGrath**, Visit Albuquerque

**Erica J. McNamara**, American College of Surgeons

**Maureen Moore**, Fabricators

**Mark Rath**, Visit Omaha

**R. J. Sirois**, The Counselors of Real Estate

**Nicole Slein**, Greater Madison Convention

**Patrick Walsh**, The Launch Group

**Rachel Wilson**, Hotel Valley Ho

### *FORUM Plus Members*

**Julius Rhodes**, Academy of General Dentistry

**William Rohe**, American Academy of Implant Dentistry

**Sheila Lathion** and **Adolfo Luna**, American Association of Diabetes Educators

**Ruby Schucker**, American Association of Endodontists

**Sahenaz Pirani**, American Association of Medical Assistants

**Margie (Malgorzata) Bruynseels**, **Guysheena Gibson**, **Ruth Goodman** and **Stephen Rynkiewicz**, American Bar Association

**Kathy Potvin**, American College of Prosthodontists

**Thomas Elliott**, **Anna A. Fleming**, **Jeffrey Fraum**, **Michelle Hoffman**, **Nicole Mangiaracina**, **Michael Matyasik**, **Andrew McCampbell**, **Kelly O'Brien**, **Sherin Took**, **Shameka Walls** and **Pamela Woolf**, American Dental Association

**Tracy Dagnon**, **Mary Kravenas**, **Charmaine Osborne** and **Stephanie Stewart**, American Hospital Association

**Monica Chapman**, **Taylor Crossley**, **Amber Hayes**, **Earla Jones**, **Ryan LaFollette**, **Barb Macikas**, **Cheryl Malden**, **Anne Manly**, **Anne Michaud**, **Julie Reese**, **Sheryl Reyes**, **David Sheffieck**, **Shuntai Sykes** and **Melissa Vanyek**, American Library Association

**Brenna Donegan**, American Planning Association

**Emily Besser**, **Dawn Hermann** and **Jenny Zales**, American Society for Dermatologic Surgeons Association

**Dina Velasquez**, American Specialty Toy Retailing Association

**Tracey Gray-Walker**, American Veterinary Medical Association

**Steven Allen**, **Paul Brown**, **Bobby Saleem** and **William Stringer**, Appraisal Institute

**Mindy Weinstein**, Association for Supply Chain Management

**Gina Prendki**, Association Management Center

**Emmy Bender**, Association of Nutrition & Foodservice Professionals

**Jill Mlodo**, Association of Professional Chaplains

**Abby MacCormack**, CCIM Institute

**Madeleine Hanan**, **Nichole Nikolic** and **Jennifer Schulte**, Executive Director, Inc.

**Thomas Burke**, **Elizabeth Hackett** and **Bryan Hitchcock**, Institute of Food Technologists

**Gwen Biasi** and **Elizabeth McCrindle**, National Sporting Goods Association

**Amy Gelbman**



## Digital Extra

To access LinkedIn Learning's "2019 Workplace Learning Report," visit the digital or mobile versions of *FORUM*.

# Talent Developers Looking Online for Learning

Companies are facing fewer budget constraints around professional development, and they're looking to spend more on online learning than instructor-led learning in the coming year, according to the 2019 Workplace Learning Report by LinkedIn Learning.

The report surveyed talent developers, or those with learning and development (L&D) responsibilities, and workplace learners to examine industry trends and the results demonstrate a rising demand for digital education, as well as an increased emphasis placed on talent development within organizations.

In 2019, only 27 percent of talent developers listed "limited budget" as a top challenge, down from 49 percent in 2017. Meanwhile, those budgets are being used more and more for digital education, with 59 percent indicating they will spend more on online learning and 39 percent saying they will spend less on instructor-led training. The good news for associations: 73 percent said that they use externally created content to train employees.

How are talent developers assessing success and deciding which skills require training? The charts below tell the story.

## Top 8 ways talent developers demonstrate the success of learning

**67%**

Closing known skills gaps within the organization

**61%**

Increasing employee engagement with learning resources

**65%**

Helping employees gain the skills needed to remain competitive

**60%**

Getting qualitative feedback from employees about their ability to apply learning

**63%**

Getting qualitative departmental feedback indicating a positive change

**57%**

Increasing favorable metrics tied to participation in learning programs

**61%**

Retaining top talent within the organization tied to learning

**52%**

Getting qualitative feedback from employees on their experience with learning resources

## How talent developers find the most important skills to train

Perform internal skills gaps assessments

**74%**

Monitor business KPIs/key metrics

**66%**

Attend meetings with executives/senior managers

**61%**

Rely on manager input

**59%**

Look to industry trends to prevent skills gaps

**51%**

Monitor complaints

**45%**



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