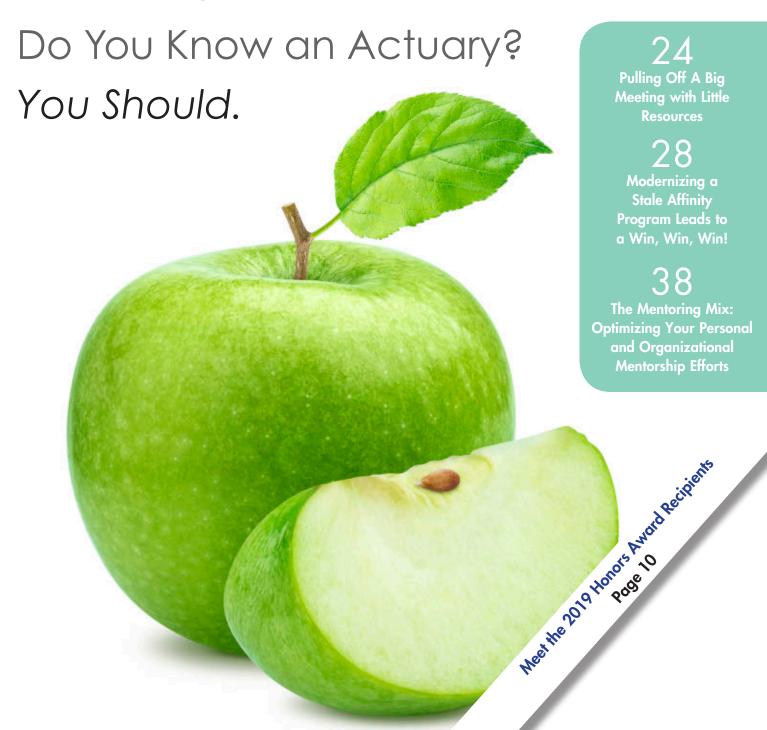


# Health Care Associations:









# MAKING BUSINESS CONSCIPE December 6, 9:21 pm

December 6, 9:21 pm
THE ELK ROOM

It had been a long day of meetings and breakout sessions, but Alex Tan's co-workers told her they had another stop to make before calling it a night. They'd heard rumors about a bar in Harbor East with an unmarked door—where cell phones and selfies were replaced with easy conversation and a steady flow of expertly-crafted cocktails. Their adventure led them to The Elk Room; and the next day on the convention floor, Tan and her new friends made a pact to meet there again before their annual conference ended. For them, Charm City had made business a pleasure.





#### Meet the 2019 Honors **Awards Recipients**

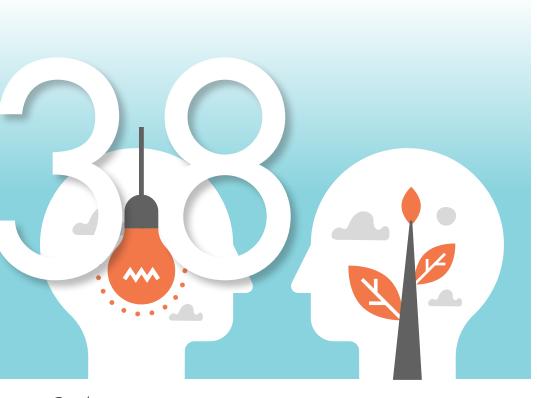
Each year, Association Forum's Honors Awards are bestowed upon the best and brightest among association executives, supplier partners and organizations in the Chicagoland association industry. FORUM sat down with this year's recipients for an in-depth Q&A about their paths to success and their hope for the future of the association industry.

# Pulling Off A Big Meeting with Little Resources

Don't let the lack of a hefty budget prevent you from giving your members and exhibitors a conference to remember. Learn how a small staff can leverage big volunteer spirit and meaningful partnerships to deliver a top-notch event without breaking the bank.

#### Modernizing a Stale Affinity Program Leads to a Win, Win, Win!

Associations are on a constant quest for ways to add value for their members, while also searching for those elusive non-dues revenue opportunities. A healthy affinity program can check both of those boxes, as long as the organization ensures that the program is truly meeting the members' needs.



#### **Digital Extras**

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



• GrowthZone's "2019 Association Industry Survey"

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

#### Health Care Associations: Do You Know an Actuary? You Should.

It's almost impossible to predict exactly what the healthcare system will look like in ten years, but the move towards value-based care is already in motion. Pull back the curtain on this industrydisrupting shift and you'll find actuaries pulling the levers. FORUM spoke with Kurt Wrobel, chief financial officer and chief actuary at Geisinger Health Care about the role that actuaries play and the importance of understanding risk in the evolution of our health care system.

#### The Mentoring Mix: Optimizing Your Personal and Organizational Mentorship Efforts

Workers who receive mentoring make more money, get promoted at greater rates and have higher career satisfaction. So why don't more professionals seek out mentoring relationships? And why don't more organizations provide mentoring programs for their employees? Learn more about the different types of mentorship and how securing a mentor can help your career take off.



#### **Departments**

Letter from the CEO

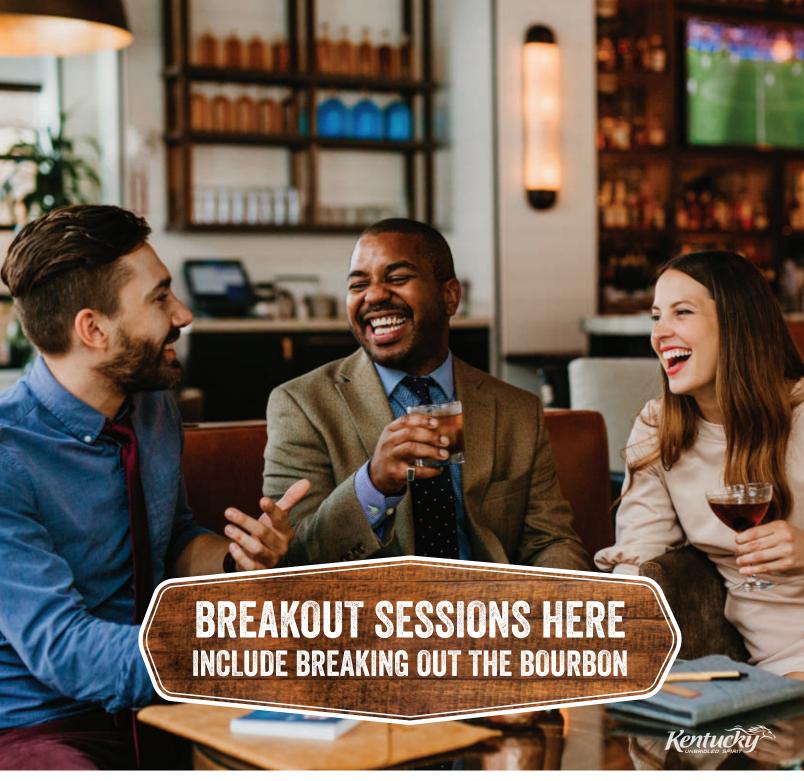
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# Meet My Team



### **Antitrust** Concerns?

Paul Olszowka counsels nonprofits on all aspects of antitrust and competition laws.

Join Paula Goedert and Paul Olszowka at Barnes & Thornburg LLP.

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#### Publisher

Michelle Mason, FASAE, CAE mason@associationforum.org

Content + Publications Manager Dan Shea shea@associationforum.org

Graphic Design Manager Matthew Baldwin baldwin@associationforum.org

#### ADVERTISING REPRESENTATIVES

Senior Manager, Business Development Phyllis Scott 312.924.7033

scott@associationforum.org

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

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# **Entering the Fourth Industrial Revolution**

One year ago this month, Association Forum introduced a brand-new Learning Management System with the goal of providing our world-class education through a convenient and accessible portal. With 40% of our membership located outside of the city limits of Chicago, we understood that it wasn't always feasible for these members to come downtown to attend sessions. Coupled with our focus on digital transforming Association Forum, this LMS was a logical and necessary next step in the evolution of our offerings.



Michelle Mason. FASAE, CAE President & CEO Association Forum

Since then, several hundred of our members have logged in to view live webinars, peruse our library of recordings of past live events and listen to the CEOnly Podcast, which is also available on iTunes and other podcast platforms. They participated in these digital offerings on their phone, while riding the train to work; or from a laptop in a conference room at their office: or on a tablet while flying to their annual conference. By offering digital options for education, associations can provide their members the flexibility to learn at their own pace.

The growth and importance of online learning is not a replacement for in-person education, rather it's a supplement. For years, prognosticators theorized that the new digital-focused generations would forego traditional trade-shows and conferences in favor of online options, but both Generation Z and Millennials are demonstrating a propensity to spend their money on experiences over tangible products. These generations like to travel, and they see value in real-life connections.

The key to tying together the digital and in-person elements of our education and resources is a clear and actionable content strategy. In 2015, Association Forum introduced a brand-new content strategy, with help from Debra Zabloudil

and the Learning Studio Inc. Since then, we have continued to assess and adjust that strategy based on the needs of our membership.

As our world enters the Fourth Industrial Revolution that is connecting people with technology, we look forward to continuing to grow our digital footprint and providing the best association education available through the means that you, our members, most want to receive it. We encourage you to follow our digital transformation journey.





# CORE VALUES VALORES FUNDAMENTALES

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.

### The Importance of **Copyright Registration**

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



Q: I understand that the **Supreme Court** recently decided a case involving copyright registration requirements. Are associations affected?

Yes. On March 4, 2019, the United States Supreme Court issued a unanimous decision in Fourth Estate Public Benefit Corp. v. Wall-street.com, LLC, et al., holding that the U.S. Copyright Act allows a copyright owner to proceed with a lawsuit for copyright infringement only after the owner obtains a registration certificate for the work from the Copyright Office. The ruling resolves a long-standing split among the lower courts. Specifically, prior to the Court's decision, some jurisdictions did not require registration as a prerequisite for filing suit. Instead, they allowed a copyright owner to initiate a suit as soon as the owner filed an application for registration.

Fourth Estate is a news organization that produces online stories, which it licensed to Wall-street.com, LLC, a news website. After Wall-street.com cancelled the license agreement, it nonetheless continued to display articles produced by Fourth Estate. As a result, Fourth Estate sued for copyright infringement after it filed its copyright applications for the news articles, but before the Copyright Office had made a decision to grant (or refuse to grant) registration. The Supreme Court dismissed the case because the Copyright Office had not yet granted its registration.

The decision is important to all owners of copyrightable works, including associations, because of its effect on the timing of an infringement claim. While the author of a work automatically acquires "exclusive rights" (e.g., rights of reproduction, distribution, and display) in that work immediately upon the work's creation, the author nevertheless must comply with the Act's registration requirements before pursuing an infringement claim in court. Thus, if an association creates a white paper or authors a set of guidelines, but elects not to register the work, it cannot pursue a claim for infringement that might later arise until after it completes the registration process. Currently, it takes the Copyright Office several months to issue (or deny) a copyright registration after a claimant submits an application. Until the registration is issued, the association could not take legal action to stop the alleged infringement of its work.

To avoid the long delay, an association can file an expedited application for registration. Expedited filing significantly shortens the time between application submission and registration to a matter of several days, but involves a higher registration fee of \$800 per work. Where the potential infringement involves a single work, it may be worthwhile to pay the expedited registration fee. On the other hand, where the infringement involves a series or group of works, like a year's worth of journal articles, expediting registration may be prohibitively expensive for the organization. It is worth noting, however, that the Court did make clear that once a copyright is registered, the

copyright owner can recover damages for infringement that occurred both before and after the registration.

As a reminder, copyright protects "original works of authorship" that are "fixed in a tangible form of expression" and possess at least "some minimal degree of creativity." Copyrightable works include literary works, musical works (including lyrics), choreographic works, graphics, maps, technical drawings, motion pictures and other audiovisual works, and architectural works. Copyright does not protect ideas or concepts, improvisational speeches that have not been recorded or written down, titles, slogans, symbols, or various listings. While slogans and symbols may receive trademark protection, the protection for most listings, such as membership directories, is limited. Specifically, the courts have held that the name, address, telephone number, fax number, and occupation of an individual constitute "factual data," not original works. There are, however, exceptions. For example, if the directory is organized based on a unique arrangement of the facts, that arrangement may be subject to copyright protection.

For works created on or after January 1, 1978, the term of copyright is the life of the author plus seventy years. The duration of copyright for works made for hire, i.e., works created by staff or under contract with a third party, is 95 years from publication or 120 years from creation, whichever is shorter.

Since March 1, 1989, the Copyright Act has not required a copyright owner to affix a copyright notice to a work, but many copyright owners still find such notices beneficial.

Specifically, although a copyright notice (typically consisting of a © or the word "copyright," the author's name, and the year of first publication) is not a substitute for registration, it may serve as a deterrent against infringement and as evidence to defeat a "fair use" or "innocent infringement" defense.

Associations should recognize the importance of the registration requirement at issue in Fourth Estate. Obtaining a registration certificate creates a public record of key facts related to the authorship and ownership of a work, including the title, author, name and address of the copyright owner, year of creation, and information about whether the work is published, has previously been registered, and includes preexisting material. When works are registered prior to infringement or within three months after publication, the copyright owner is eligible for statutory damages, attorneys' fees, and costs, even if actual damages are minimal.

The Court's decision in Fourth Estate encourages copyright owners, including associations, to register their works with the Copyright Office as soon as they are created. An informational brochure on "Copyright Basics" is available on the Copyright Office website at: https://copyright.gov/circs/ circ01.pdf. In addition, an FAQ regarding the registration process may be accessed at: https://www.copyright.gov/help/ fag/fag-register.html.

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.



# **Open Now!**

Applications will be accepted May 29 through July 19.



Association Forum and USAE News are pleased to present the seventh annual Forty Under 40® Awards. We're looking for 40 accomplished association or nonprofit professionals who are younger than 40, demonstrate high potential for continued success in leadership roles and exhibit a strong passion for—and commitment to—the association management and nonprofit industries.





Visit www.associationforum.org/fortyunder40 for eligibility requirements, application instructions, judging criteria and a list of past recipients. If you'd like to receive updates on this award, email awards@associationforum.org.

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## Meet The 2019 Honors Award Recipients

Each year, Association Forum's Honors Awards are bestowed upon the best and brightest among association executives, supplier partners and organizations in the Chicagoland association industry. FORUM sat down with this year's recipients for an in-depth Q&A about their paths to success and their hope for the future of the association industry.

#### Samuel B. Shapiro Award for Chief Staff Executive Achievement

The highest honor the Association Forum bestows on an association professional, the Samuel B. Shapiro Award for Chief Staff Executive Achievement, is presented to the chief staff executive (e.g. CEO, executive director, or equivalent level) for outstanding service and accomplishments in association/nonprofit management.



Gary LaBranche, FASAE, CAE President & CEO National Investor Relations Institute

As the former CEO of Association Forum, what does it mean for you to be honored by the organization you once served?

Receiving the Samuel B. Shapiro award (or "the Sammy," as it has been called), means a great deal to me because I knew and was inspired by Sam. I have known many past recipients, and being included among their numbers is very humbling, as they have been role models and legends. And being honored by Association Forum is very cool. It is rare for a former CEO to be recognized like this, and it is a thrill to join past Association Forum CEO Chris Mahaffey, FASAE, CAE in this award. As the organization's CEO I had the privilege to help present the award and am very honored to now be on the receiving end!

#### What is your hope for the evolution and progression of the association industry over the next 5-10 years?

When I worked at the US Chamber of Commerce, I discovered a white paper that summarized the forecasts of a group of association CEOs 30 years before. I was staff executive to the Chamber's Association Committee of 100 (C100), and so we replicated that effort in 1994. Later, as a member of the C100 in 2014, I facilitated another round of forecasting by the group. These efforts allowed us to analyze 50 years of association trend forecasts. We learned that some predictions were right on the money, like globalization (1994). Some were wildly wrong, like government take-over of certification (1964). But there were notable misses, like the failure to mention the potential impact of the internet in 1994. The lesson is that while forecasting trends is a useful and important exercise, what matters most is the openness to discover potential changes, and the willingness to adapt accordingly. My hope is that my colleagues will always have the intellectual curiosity to search for and consider potential impacts from a wide variety of sources, and then have the courage to help lead the changes and innovation required to thrive in the future.

#### What is your advice to young association professionals who hope to follow your path to the C-Suite?

The imperative to "Know Thyself" is as true today as it was when it emerged in the 4th century BC. Aspiring CEOs must examine and fully appreciate their strengths and weaknesses, their desires and motivations. Being a CEO isn't for everyone. I first became a CEO at 27, and it wasn't nearly as much fun as I thought it would be. And I wasn't as prepared or as mature as I needed to be. Self-awareness is crucial to success in the C-suite. To find your path to the C-suite, you must first find yourself. My advice is simple: show up and say "yes." Take on the tasks that others avoid. Volunteer, and learn what makes volunteers tick. Get out of your comfort zone and take on new challenges. Get uncomfortable and figure out why you feel that way. Become an expert in you.

#### Over the course of your career, what moments or accomplishments bring you the most pride?

My association career has provided me with the privilege of doing so many interesting, challenging, fulfilling and fun things. But if I had to mention one, it would be the satisfaction from the role that I played in modernizing the Certified Association Executive (CAE) program. I joined ASAE as vice president, professional development in 1995, and the CAE program was among my responsibilities. I arrived just before the first "Job Task Analysis" was completed, a critical step in developing the new CAE exam blueprint. We then began developing the "item bank" (questions) for the new exam form. This was a huge challenge, as the Item Writing Committee and my staff team had to learn the difficult process of crafting valid questions. My biggest task was getting buy-in from various stakeholders, including some who were not pleased that the CAE program was changing. But the old exam, which had not changed much in 25 years, included a great deal of subjectivity. Answers to exam questions, which included essays, were scored differently by different judges, resulting in a high degree of variability. The resulting CAE exam is based on quantitative research about the profession and is psychometrically valid, reliable and legally defensible. It is also updated on a regular basis and strives to meet certification standards. I am very proud that the work that I and others did to modernize the CAE program continues to impact the profession that I love.

#### When and how did you know that associations would be your lifelong career and passion?

I decided to become an association professional when I was attending The Ohio State University. I was very involved in politics and had been a paid full-time coordinator for the re-election of a US Congressman and served on the staff of the Ohio State Senate. Those roles gave me the chance to meet many association executives, and I was very intrigued by what they did. I was attracted to the intellectual diversity of the job and the variety of activities: budgets, advocacy, education, committee and board work. I also noticed that people who were not much older than me held important positions in state and local associations, including as CEOs. I eventually became an intern at the headquarters of my college fraternity, Tau Kappa Epsilon, where I worked for its CEO, T.J. Schmitz, CAE. He was on the ASAE Board, and later received the ASAE Key Award. He encouraged my interest in association management and hired me after I graduated. Now, 38 years later, I can say that choosing association management was the right choice for me.

#### Samuel B. Shapiro Award partner:



#### John C. Thiel Distinguished Service Award

The John C. Thiel Distinguished Service Award is presented for outstanding service to the Association Forum by an individual association or supplier partner member. This award has been presented for exceptional, long-term, volunteer service to the Association Forum, primarily through committee service or similar contributions.



**Burt Blanchard** Association Professional

#### What does it mean for you to be awarded this honor by your peers and by Association Forum?

When I started in associations, I didn't know it'd bring the breadth/depth of experiences I've had. When Michelle Mason called to tell me that the board approved me as recipient of the John C. Thiel Distinguished Service Award, I was speechless (which is hard for me to be, most occasions). This question was with me the rest of that day—and even now—what does this really mean? It means so much to be recognized for something I'm so passionate about. It's nothing short of awesome! What receiving this prestigious award says to me is I've made the right career choice, and I've had an impact. It means that where I stand now is only possible because of those who came before me. I stand on the shoulders of peers and colleagues from whom I've gleaned best practices and better ways to do what we do collectively. It means that whatever I do, I do it with a spirit of excellence, and strive to leave things better than it was before being engaged in it. I'm humbled and grateful to my family, the Association Forum staff, the board of directors, the Awards committee, colleagues and acquaintances for this service recognition.

#### What is your advice to young association professionals who hope to follow your path in this industry?

Don't be afraid to get involved. Look for the opportunities to serve the association world and do it! Start local in your backyard. For Chicagoland, that's through the Association Forum. They provide so much by way of developing the whole association person. I'd further tell a young association professional that if you start now, you'll be amazed years from now at what level of service you will have given, and its impact. From small helps to large projects, every minute spent volunteering and engaging has an impact. The first step is just entering associations is to take Association 101 for a sound foundation. Next, find your community through Association Forum's Shared Interest Groups (SIGs), and get involved. Lastly, further your engagement through Forum Forward or Holiday Showcase, and don't miss Forum After Dark. There are so many opportunities to engage—avail yourself by jumping in. It's all rewarding!

#### Over the course of your career, what moments or accomplishments bring you the most pride?

There are many, and in each, it's been the opportunity to serve—to give back and make things better than they were. After making the decision to work as an association professional, my next important accomplishment was pushing myself to get active with Association Forum. There's a saying not to forsake small (humble) beginnings. Being able to serve on Association Forum committees was paramount to my engagement/serving goals. These three accomplishments stand out: First, when I served on the last Diversity Committee, then chaired the newly created Diversity + Inclusion Committee (which was the precursor to today's Welcoming Environment). Second, being asked to serve as an Association 101 facilitator. It's an honor to give back through delivering the content and imparting personal association experiences. My third, and biggest, moment is having an impact on an organization by creating and implementing a new membership/department/revenue stream never realized in the organization's history. It afforded me the opportunity to be an 'intrapreneur,' created jobs, and hired/trained/developed great people that are now making their own impact in associations. It's all been my honor to serve and make the difference.

#### When and how did you know that associations would be your lifelong career and passion?

My path, like many others, was that I fell into the association world. Before associations, I worked for a hotel, and an association kept utilizing it for many events. I saw the staff having fun, the revenue the association was generating, and it piqued my interest. So much so that I began my quest to move from corporate to association. And through a quick network, a friend introduced me to their good friend who had an opening at the American Bar Association's Meetings and Travel Department. Two years in and getting an understanding of associations, I knew—I knew associations were a place where you could be creative, do projects that have heart/impact, where you can live vicariously through the members' work and

that you too create impact! I was absolutely hooked. I've lived through meeting planner roles, coordinator, assistant manager, business development, director and more. After years of enjoying this work, it still excites me to this day to be in this incredible industry.

Those who know me best know I love what I call "...now, that's a t-shirt motto..." They're simple ideas that make great t-shirts. I put these thoughts on whiteboards to remind me how blessed I am to be part of this incredible industry. Summing up my passion is this t-shirt motto, which I say all the time: "Let's do what we do and do that well!" Stay passionate. Stay hungry. Stay a humble servant to members and peers alike; for then your path forward will ALWAYS be clear!

#### James D. Gibson, PMP, PHR Strategic Consultant, Technology Management DelCor Technology Solutions



#### What does it mean for you to be awarded this honor by your peers and by Association Forum?

I am deeply honored to be one of the John C. Thiel Distinguished Service Award recipients for 2019. I have thoroughly enjoyed working in the association community over the last 15 years and I am extremely grateful to receive this recognition. I value my relationships with the excellent staff at Association Forum as well as my association colleagues. I have made lifelong friends and have learned so much along the way that has helped my career. Being recognized motivates me to remain on my volunteer path and continue to share and learn alongside my friends and peers.

#### What is your hope for the evolution and progression of the association industry over the next 5-10 years?

The biggest opportunity associations have over the next 5-10 years is to continually challenge their own status quo. Asking questions and disrupting how things have always been done is perhaps daunting but can also lead to rich rewards. Recently I have seen many associations investing in their technology as an enabler to their business goals. I would like to see that continue and have their technology leaders become influencers and trusted advisors within their organizations. Another challenge to the status quo is to view data as a strategic asset. Many organizations are on the journey of good data governance and many more should be considering it. Good practices around data quality, data policies, metrics, analyzing trends, and technology that enables you to use data as a corporate asset is a valuable investment for associations.

#### What is your advice to young association professionals who hope to follow your path in your industry?

I think it is so important to support the association community by volunteering. Giving each other the benefit of our individual knowledge and experiences helps associations get answers to common questions more quickly whether you are using the online forums or going to an education session or a SIG event. I would encourage young association professionals to get out from behind desks and devices and attend an event or contribute content or answer a question from their peers. It is such a great way to network and meet others with both shared and diverse interests. Also keep adding to your personal stories and your professional journeys. You may be surprised at the paths that you find, so always keep an open mind and do not limit yourself.

John C. Thiel Distinguished Service Award partner:





### Learn the Best Techniques for Proving ROI

The Lippman Connects Exhibit Sales Roundtable (ESR).

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#### Association Professional Achievement Award

The Association Professional Achievement Award is presented to an association professional member for exemplary service and outstanding accomplishments in association management. This award reflects a high level of commitment to professional growth and personal pride in the association management industry.



Laura G. Davis, CAE Senior Director of Membership, Marketing & Communications Association Management Center

#### What does it mean for you to be awarded this honor by your peers and by Association Forum?

I am grateful and extremely humbled to receive the Association Professional Achievement Award from Association Forum. I've worked in this field for most of my professional career and it's inspiring to be honored by my association colleagues whom I greatly admire and respect.

#### What is your hope for the evolution and progression of the association industry over the next 5-10 years?

My hope for our industry is that we can effectively adapt as our members' industries and the world around us continue to change. I think associations often get mired in process and can sometimes miss opportunities that are right in front of them. Let's not let other organizations or entities seize these opportunities from us.

#### What is your advice to young association professionals who hope to follow your path in this industry?

My advice to young professionals is to find a job and make a living doing what you enjoy; volunteer for something you're passionate about; and never stop learning.

#### Over the course of your career, what moments or accomplishments bring you the most pride?

From an association perspective, I am most proud when the hard work our staff puts into a program results in positive feedback from members. Most recently, I think of the annual meeting of my client, the American Academy of Hospice and Palliative Medicine, and the number of attendees who commented on Twitter about their experience. "Home from #hpm19 and more inspired than ever! Reconnecting with old friends and making new ones, strengthening our community, and sharing insights and experience makes this conference great. Words to describe my first @AAHPM Assembly: caring, outpatient, advocacy, homebased, team-based, passionate, loving, driven, insightful, furious, gritty, and motivated. Best conference ever. My cup has been refilled." These comments, coupled with the many, many smiling faces of attendees inspire me in my work and make me proud to work for our association.

#### When and how did you know that associations would be your lifelong career and passion?

I started out working for state government. Frustrated with how slow things moved and the multitude of projects that got derailed because of bureaucracy and politics, I took a job with a regional business organization and have never looked back. It's been rewarding to see how associations and their committed members have advanced our society. The work we do impacts policy, educates the public, and truly makes a difference in people's lives.

Association Professional Achievement Award partner:



#### The Inspiring Leader Award

The Inspiring Leader Award is presented to an individual who has established a culture leading to employee satisfaction, motivation, engagement and achievement.

#### Karen Horting, CAE Executive Director and CEO Society of Women Engineers



#### What does it mean to you to receive this award?

I am so honored to receive this award. I think that I have the best team in the world. To be nominated by them is really humbling. In association management, we practice servant leadership. We make sure that our members and volunteer leaders are front and center in terms of the organization and its accomplishments. At my annual conference and other major events, I'm rarely on the stage. I make sure my volunteer leaders get those opportunities. I encourage them to take the credit for all the progress we're making as an organization. As a board member or committee chair or section leader, we want them to feel they are making a contribution to the success of the organization.

That means that as the staff, we're in the background toiling away to make sure things happen—that the programs and services meet the members' needs and are well executed, that we're scanning the environment to look externally for trends, opportunities or threats, and that we're executing on the strategic plan...all the things that make for a thriving organization.

As a CEO, you tend to hear the constructive feedback and not a lot of compliments—lots of armchair quarterbacks. Therefore, as a leader, you have to absorb that for your staff and instead help them focus on the accomplishments and celebrate the successes while learning from things that don't go as planned. Some days it's easier than others. But I really believe successful leaders are able to filter out the noise for their teams and create a vision that helps each team member see how their role is advancing the mission.

So, I guess that's a long way of saying that it's extremely gratifying to receive this recognition for creating a positive organizational culture through my leadership.

#### What is your personal approach to leadership and how do you bring that to life at your organization?

There's a great John C. Maxwell quote: "If you think you're leading, but no one is following, then you are only taking a walk." And I think that is so true! My approach to leadership is to be as authentic and transparent as possible. If you aren't authentic, your team will see right through you. In my first six months in the CEO role, I tried to emulate my predecessor, but her style and my style were completely different. I wasn't comfortable, and neither was my team. So, I called a peer who had been in a similar situation a few years earlier and he told me how he had done the same thing but then realized that the board had promoted him based on his skills and qualifications. He said, "They hired you for you, not to be exactly like Betty." And he was right! I've tried to follow that advice as I lead my team. Great leaders recognize they don't have all the ideas. You need to create a culture where everyone can be heard and contribute. I think an inspiring leader is able to elicit the best from every member of their team.

#### What is your advice to young professionals who hope to be leaders in the association industry?

My number one piece of advice is to find an organization with a mission that you are passionate about. That will make the work so much more gratifying. The days can be long and the work can be challenging. But when you have that passion and you see the mission in action, there is no greater feeling. Increasing shareholder return can't even compare!

Inspiring Leader Award partner:



#### The Welcoming Environment Organizational Award

The Welcoming Environment Organizational Award is awarded to an association that has demonstrated exemplary outcomes in providing an inclusive and welcoming environment and culture.

#### American College of Healthcare Executives

Responding to the Q&A on behalf of ACHE:

Cie Armstead, DBA Director, Diversity and Inclusion **ACHE** 



#### What does a Welcoming Environment mean to you?

A Welcoming Environment means that an organization or group takes intentional steps to consistently provide a culture that helps everyone feel that they belong. Each person is received and respected as an individual. Each person is encouraged and empowered to bring his or her whole self to the organization. As a result, the individual and the organization gain the benefits of a richly diverse, inclusive environment.

#### How do you ensure that diverse voices are heard and respected at ACHE and why is that important to the organization?

Diversity and Inclusion is one of ACHE's four core values. We incorporate this core value throughout the organization to cultivate an environment that hears and respects diverse voices and viewpoints from our members and staff. For example, each year we conduct an employee opinion survey (EOS) that provides a safe, anonymous way for all staff to give candid feedback on a wide range of topics. Most importantly, senior management then uses the results of the EOS to make ongoing improvements. Other examples stem from our adherence to the rigorous Baldrige Framework for Performance Excellence, which focuses on best practices in leadership, customers, and workforce. As one example related to Baldrige, ACHE uses various mechanisms to capture the Voice of the Customer—specific, intentional steps we take to solicit and respond to all segments of our customer community.

#### What are the most important steps other organizations can take to create a Welcoming Environment?

The important steps an organization can take to create and cultivate a Welcoming Environment depends on where that organization is on its own diversity and inclusion journey. For organizations who are early in the process, an important initial step is to take an honest assessment of the organization's readiness for change. This includes assessing the readiness of senior management, middle management, frontline staff, and volunteer leaders to make real changes that may infringe upon longstanding "sacred ground." Even well-intentioned organizational leaders may not realize how influential parts of the organization may express their willingness to change but exhibit contrary behavior when the change crosses over into their

For organizations who have been on their D&I journey for a while, an important next step may involve assessing the effectiveness of their existing initiatives and strategies related to diversity, inclusion and equity. This may require evaluating how well the D&I initiative or strategy aligns with broader organizational objectives and the relevant impact of those initiatives and strategies.

An overarching step that is essential to sustaining a Welcoming Environment is to have staff dedicated to managing this work. Everyone in an organization plays a part in cultivating a Welcoming Environment. However, having someone who has ultimate responsibility—and authority or access to authority—will ensure the sustained intentionality that's necessary for long-term success.

Welcoming Environment Organizational Award partner:



# The Common Traits of Top-Performing **Member Organizations**

A focus on members. Servant leadership. Strategic planning. When McKinley Advisors interviewed 13 executives from 11 organizations that received glowing praise from their members, these three concepts were among the most prevalent commonalities they found.

The results of these interviews make up the findings of the recently-released study, "The DNA of Top-Performing Member Organizations," which delves into the fundamental characteristics of organizations that produce above-average results as reported by their members.

Here are just a few of the key takeaways from the study:

#### **Grounded in Member Service**

It's no surprise that being member-focused is a common thread for successful member organizations. Every organization interviewed for this study recognized the "importance of an engaged and satisfied membership." But how do you achieve that noble goal?

According to the study: "Listening to members' needs through research and acting on the results of that research ranked highest in priority." This key component was described as a "two-way dialogue" by Kathy Partain, CAE, vice president of membership and marketing at the Military Officers Association of America (MOAA). Give your members the opportunity to tell you what their needs are and then use that information to meet those needs. "We have to be a model for our community," said Heather Hoerle, executive director and CEO of the Enrollment Management Association (EMA). "We learn from our members and our members learn from us. We're always looking to raise the bar."

#### Leadership in Action

Achieving the high level of success found at these top-performing organizations requires powerful and effective leadership. The executives that were interviewed often "prioritize others over any personal accumulation of power." Simply put, organizational success trumps ego. This approach is called "servant leadership," a phrase that first appeared in a 1970 essay by Robert K. Greenleaf. The idea behind servant leadership is focusing on the success, growth and well-being of the organization, staff and members above one's own personal triumphs.

"Leaders who can move organizations forward and answer not all, but enough questions, can be successful," said Jeff Shields, FASAE, CAE, president and CEO of the National Business Officers Association (NBOA). The executives who guide their organizations toward continued success know when to take the lead and when to let their staff assume responsibility.

Another consistent theme that surfaced during the interviews was humility. "Humility is an aspect of quiet leadership," said Jennifer Whittington, CAE, executive director of University Risk Management and Insurance Association (URMIA). "You let volunteers play their role, but as an executive director you have to keep the balls in the air and keep everything moving in a forward direction."

#### Strategy Drives Success

The research from McKinley emphasizes two main points around strategic planning: That it's one of the most important steps to ensuring success and that there is no one-size-fits-all approach that will work for every organization.

By utilizing strategy as a road map to the future, organizations can stay nimble while remaining focused on its goals. "When I came on, we developed a longer-term strategy that focused on the members and where we wanted to go with the organization," said Scott Artman, CPA, CGMA, executive director at the National Association of Tax Professionals (NATP). "Our strategy map shows how we support members and staff, and how it furthers the organization as a result."

Having a strategic plan is only half the battle. Keeping the plan front and center and then prioritizing against the plan are both necessary to maximize its effectiveness. "If you don't know why you're doing something, you'll just be climbing an uphill battle," said Celeste Kirschner, MHSA, CAE, chief executive officer of Large Urology Group Practice Association (LUGPA). "You can get blinded by opportunities, but if it doesn't make sense to the 'why' of your organization, you shouldn't be doing it."

A good strategic plan will provide clear direction, but also open up space for flexibility by instilling confidence in staff around their ability to adapt. "Stay nimble enough to make small adjustments, but respect the strategic plan to stay on course," said Whittington. df

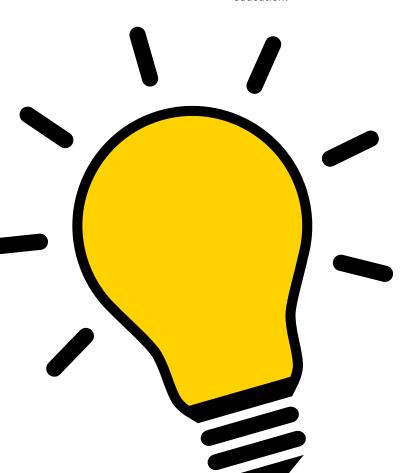
### 33 Ideas to Drive Non-Dues Revenue

At SIG Summit 2019, Association Forum members gathered for a half-day of learning, collaboration and brainstorming, resulting in a tremendous output of unique ideas for associations of all sizes and scope. Over the next few issues of FORUM, we'll present for our readers most innovative and applicable of these ideas.

> This part of this series, culled from the session, "Everyone's Due-ing It! Crowdsourced Ideas to Drive Non-Dues Revenue," looks at different ways organizations can diversify and maximize their non-dues revenue streams.

#### **Education**

- Convert a popular in-person course or workshop into an online course/workshop...or vice versa.
- Offer self-assessments that link users back to relevant educational offerings that will provide them with more training/knowledge in those areas based on their responses.
- Podcasts can provide additional revenue streams through advertisements and sponsorships
- Take the "Best of the Best" from session recordings and convert those soundbites to a podcast
- Offer additional pre- and post-conference workshops and courses that are tied to the conference education.



- Offer complimentary live webinars to create buzz and drive attendance, but charge a fee for on-demand recording, additional resources and bonus content.
- Offer online practice tests at a cost for certificate/ certification examinations using retired questions from past exams to help with test anxiety.
- Create "product bundles" by theme or topic that combine old and new content, or offer "Top Five Most Popular Sessions" from a previous conference.
- Sell supplemental learning materials like eBinders, journals, study guides. Don't print binders or workbooks for an in-person course, offer them as available-for-a-fee.
- License content and revenue share content and programs with partner associations and educational institutions.
- · Offer pre-paid education or an education subscription. For example, 10 CEs per year at a monthly or annual cost.

#### Career Development

- Administer self-assessments to support professional development and career transitions. For example, DISC, Myers-Briggs or StrengthsFinder. Have available multiple assessments for different career levels and needs.
- Mentor & coaching programs.
- Offer one-on-one instructor access and tutoring.
- Offer resume review and practice phone/Skype interviews.
- · Sell access to online study guides and study groups as a course or certification prep course add-on.
- Offer Reverse/Reciprocal Mentoring programs. For example, Millennials mentoring Baby Boomers and vice versa.
- Charge a fee for job board postings.

#### Membership

- Offer a la carte membership and product/service packages or introduce a subscription model membership.
- "Round Up Program" or "Membership for a Cause." For example, round up a \$95 membership fee to \$100 to donate \$5 to foundation or other charity.

#### **Sponsorships**

- Sponsored Ad posts on Social Media or sponsored "takeover" of Instragram/Twitter/Facebook/ SnapChat.
- Featured posts from thought leaders in organization's Online Community.
- Create more unique sponsorable offerings such as podcast series, session catalogs or conference handbook/guides to provide added value.
- Consolidate sponsorship packages: Platinum, Gold and Silver Sponsorship packages.

#### **Events**

- Virtual summits, tele-conferences and online meetings. Organizations can charge for a fee, but may also save money if replacing in-person events.
- Livestream popular in-person events.
- TED Talk-styled events to drive attendees to exhibit hall. These talks can be sponsored by an industry leader.
- VIP Speaker Webinars: Popular speakers/industry leaders that members really want to hear from. Can be a sponsored presentation or available for a fee.

#### Miscellaneous

- Offer a Buyer's Guide with ratings and reviews as opposed to just an alphabetical listing.
- Report data from member surveys as a business trends resource, similar to a salary survey.
- Find underwriters for publications, benchmarking data tools and other resources.
- Use chapters to sell sponsorships and exhibits.
- Curated events-within-events to maximize attendee options at a conference and provide additional sponsorship opportunities.

"Everyone's Due-ing It! Crowdsourced Ideas to Drive Non-Dues Revenue," was facilitated by Kara Adams, CAE (BlueSky) and Myria Stanley, MS, DES (American Academy of Physical Medicine and Rehabilitation).

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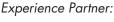




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# Pulling off A Big Meeting with Little Resources

By Mary Ann Passi









here are many articles, blogs and business guides that offer advice on how to run effective meetings and even more on meetings that produce results. But the bulk of those articles appear to be written for organizations with seemingly endless budgets. What happens when you need to pull off a big meeting with little resources? To find out, FORUM turned to Daniel Borschke, FASAE, CAE, executive vice president of the National Association of Concessionaires (NAC). Borschke shared his organization's story and tips for not letting scarce resources get in the way of executing an event that delivers.

NAC's annual big event is the NAC Concession and Hospitality EXPO which features 20,000 square feet of trade show space for 100 booths, a 400-person General Session and numerous breakout sessions and leadership meetings. This summer event rotates around the country, preferring to use "big box" hotels, since convention centers have not worked well for the group in the past and their discerning membership of concessionaires.

The NAC has aggressive goals, anticipating results of at least a \$250,000 return on investment. How do they make it all happen?

#### Recruit Friends & Volunteers

With just four NAC staff members, human resources are limited for this organization. NAC subsidizes its team by using third-party contractors and friends of the industry to make the meeting happen. And happen it must, as the EXPO is NAC's main annual fundraiser. As with many associations, sponsorships, registration and booth revenue are the major income sources for their week-long event. As the trade show has grown, NAC enlists friends of the industry to assist in both registration and the meeting logistics.

"When it comes to the NAC EXPO, we have a policy of all-hands-on-deck," Borschke shared. NAC has two major events within a five-month period each year, so they need to stretch their resources even further. NAC also co-sponsors CinemaCon, a movie theatre-based trade show in Las Vegas with an accompanying charity golf outing that is owned and produced by the National Association of Theatre Owners. Summer months are spent on making both of these events happen, while fall affords the staff team time to regroup and plan for the next two events.

#### Manage Time & Ask

The EXPO Committee adds approximately 15 volunteer leaders to the 4-person NAC team. The committee's main function is to sell booths, solicit sponsors and encourage fellow NAC members to register for the event.

NAC staffers make the most of their volunteers' time—meeting only once in person to communicate what must be done for the event. They then touch base during shorter, weekly Friday check-ins for progress toward their goals. Professional staff members provide motivational encouragement and 'must dos' for exhibitor and sponsor recruitment each week. Exhibit and sponsor goals are usually met six to eight weeks before the EXPO. These weekly check-ins end once goals are met, providing an incentive for volunteers to keep recruiting.

Moving these 'asks' to volunteer leaders adds positive peer pressure to the exhibiting/sponsoring companies, while providing immediate results for this group of volunteer leaders. They are asked for a specific task, given a goal and then go off and accomplish that goal. Using the committee frees up staff and management from always asking for money, allowing them to focus on other aspects of the event.

The most difficult aspect of managing the event with volunteers and 'friends' is striking a balance for their support. Infusing committee members with a sense of urgency to engage their



Daniel C. Borschke, FASAE, CAE Executive Vice President National Association of Concessionaires

"Moving these 'asks' to volunteer leaders adds positive peer pressure to the exhibiting/sponsoring companies, while providing immediate results for this group of volunteer leaders. They are asked for a specific task, given a goal and then go off and accomplish that goal. Using the committee frees up staff and management from always asking for money, allowing them to focus on other aspects of the event."

> fellow NAC members is a challenge. Competing with their full-time jobs, the NAC team has found the weekly updates and 'public' progress toward goals helps enormously to keep the effort top-of-mind.

#### Creatively Control Expenses

As NAC's largest annual income generator, the NAC team attempts to keep all expenses for the event as low as possible using a variety of creative methods to meet their planning needs. The organization requires a well-known speaker for their general session. They've successfully negotiated lower prices for these speakers using speakers' bureaus. They also enlist prominent industry thought leaders to showcase their event. This both encourages attendance and promotes the event at no cost to the organization.

Another trick? Donated food and beverage items. "Since our attendees are in the food and beverage industry, we can incorporate donated products into our program," Borschke said, warning that this is not always as much of a perk as it seems. Because concessionaires are food "experts" they want only the best at their event, and expect such despite not wanting to pay the real price. It is another nuance of this event that needs to be well managed and controlled to be successful.

NAC believes in being "flashy" for this event. Borschke states, "It is imperative for us to find exceptional reception and dinner venues, as well as exclusive or limited access tour locations." Take the 2019 EXPO, held in Chicago for the very first time this summer – and NAC's 75th anniversary event. NAC has events planned at

Wrigley Field, Navy Pier (with complimentary fireworks, of course), Soldier Field and the Chicago Theatre. Their Annual Membership Luncheon will also take place at The Mid-America Club. Unique locations for association events - and negotiated by the NAC team to meet their "flashy" needs.

Bottom-line: They use all their collective contacts to reduce costs, generate excitement (FOMO) and increase income for the event.

Along with the profit of this event, NAC's goal is 'contentment by all'. They share our challenges of demanding vendors desiring more traffic. And the nature of their members' industry opens them up to even more criticism than most of us deal with regarding refreshments and meals, as their food and beverage professionals are critiquing their choices.

NAC is also very sensitive to containing registration fees. Realistically, Borschke shared, this will likely be a \$200,000 return due to rising expenses and a limited number of cooperative sponsors. This is still an amazing return for an annual event with only four full-time staff and limited resources to pull it off.

With creative vision, flexibility and vision, your organization can maximize its resources to do a lot with a little.

Mary Ann Passi, CAE, is the CEO of the Corporate Housing Providers Association. She can be reached at map@chpaonline.org.

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oes the term 'affinity program' conjure up visions of discounts on rental cars or rooms at the local Motel 6? Just a short time ago, association executives would add companies to their affinity programs that offered the best deals without fully considering the needs of their members. Today, many associations are realizing the value of affinity programs, investing new resources towards refreshing stale affinity programs or reinventing an affinity program altogether.

The new affinity program model is much more sophisticated in its consideration of an organization's diverse membership by identifying opportunities to increase member value and association revenue. Affinity programs benefit the association, members and the partner companies.

For the American College of Prosthodontists (ACP), refreshing an older model led to enhanced member valued programs and an increase in revenue. When Mark Heiden, associate executive director, communications & marketing, ACP, took over the ACP affinity program, he immediately shifted how the organization managed the program. "At the time the ACP was operating according to an older model, and members could get discounts at certain hotel chains," he says. "It was like a call back to when people could not search for hotels on Google. We weren't doing enough to make sure our members were getting a good deal through the programs."

#### Win, Win, Win for all Parties

For Bryn Reese, director, professional relations, American Academy of Periodontology, reinventing AAP's affinity program—now called the Perio Perks Program—included a shift from an "affinity/royalty program" to a "member-value first program."

"We want members to have valuable new resources to succeed—if those align, we as an association succeed," says Reese. "Member value drives revenue to the partner company which drives revenue to us. If the first two don't work, we wouldn't earn revenue."

There is also the added benefit of non-dues revenue, although many argue that focusing on what benefits the member will want leads naturally to added non-dues revenue. "We had an affinity program at the Society for Women Engineers in place for seven years and it was very standard. Over the last year and half, we've increased scope because we'd like the affinity program to be one of the stronger revenue drivers," said Phil Thakadiyil, chief finance officer, Society of Women Engineers.

"Associations can see an increase in nondues revenue from the affinity programs, but you have to remain actively engaged in the program. You have to partner with companies to create a value proposition that your members will respond to and help companies distinguish themselves from others," said Heiden.

"We are always looking for non-dues revenue. We were looking to win, win, win – a three-way win," said Rachel D. Tristano, CAE, chief executive officer of South Shore REALTORS® who recently established an affinity program called the Advantage Partner Program. She is now identifying and working with partners to advertise discounts and offers to members.

#### Find the perfect home

Most association executives agree that several factors are key to ensuring a successful affinity program that leads to added value for membership and new revenue.

For years the AAP affinity program moved from different departments such as meetings and finance until it was moved to a cross-functional team. Reese, the director of professional

"Associations can see an increase in non-dues revenue from the affinity programs, but you have to remain actively engaged in the program. You have to partner with companies to create a value proposition that your members will respond to and help companies distinguish themselves from others."

> relations and Meg Dempsey, director of the membership and marketing rebranded and repositioned the AAP program from "Practice Management Resources" to "Perio Perks Program," affirming value and benefits of AAP membership.

The Refrigeration Service Engineers Society hadn't updated its existing affinity offers in some time. So, when Steve Vaughan, membership & marketing manager, stepped into the position he decided to look at what the society's members believed added value to their membership. "I'm hoping this adds to our recruitment and retention efforts. I'm planning on surveying our membership and while that's good to establish a benchmark, I also think it lets members know that you're keeping them foremost in mind. I'm hoping this will increase a net promoter score—the likelihood that a member would recommend the Refrigeration Service Engineers Society to a prospective member," said Vaughan.

#### Listen to Members

According to Ken Thomalla, chief operating officer, Treloar & Heisel, associations have evolved into more of a member-focused approach vs. a product approach. Treloar & Heisel, a financial services and insurance firm for dental and medical professionals, is a partner to both AAP and ACP.

"In my tenure I've seen the need for association executives to listen to their members become increasingly important," said Thomalla. "People don't join associations like they have in the past and associations recognize they need to show value. Showing value keeps penetration levels at their highest."

Whether through formal surveys or phone calls, associations are focusing on being responsive to the needs of their members. For ACP. involving the membership department determined that members wanted help with developing websites for their individual practices. ACP identified a partner program, PBHS, that offers website design and marketing packages to dental practices. PHBS benefits by getting their services in front of thousands of dentists, ACP members can purchase the packages at a discount rate and ACP receives royalties.

"Our process includes circling back with members to ensure they are happy with the services they receive from our partners," said Heiden.

#### Identify valued partners

When developing AAP's Perio Perks Program, Reese intentionally sought out prospective partners that provided value to AAP members in all stages of their careers from residents to retirees. It resulted in a thoughtfully curated set of fresh and modern offerings that benefitted all members without duplicating other like-minded affinity programs. "The partners address worklife balance via the AAP Lifestyle category as it engages our retired members as well as active members. While retired members may no longer have an interest in practice resources, they

do have an interest in discounted travel and entertainment opportunities for their families and grandchildren," said Reese.

In the past, many AAP partners had evergreen contracts and stayed around for a long time. Now AAP sources potential partners, develops the value proposition and only interviews and selects companies that would be of benefit to members. One new partner provides professional development, helps resident members with CV development and provides prep services to join a practice or to position themselves as speakers.

"At the Society of Women Engineers, we are careful about who we select and what agreements we choose. We don't want our brand to suffer in any way and have prominent companies like American Express, Verizon and Hertz," said Thakadiyil. "Those go a long way in terms of reputation. They also cover a wide demographic because we have women working for Fortune 100 companies to women entrepreneurs, so we need to cover our full membership."

For the ACP, reviewing affinity program partners that had been in place was critical to success. "We had an office supply company in our affinity program because we assumed every dental practice needs office supplies. What we discovered is that they were getting better deals by going directly to the store website. Our members didn't need our help with these things," added Heiden. "So now, we focus on where our expertise can help them and respond to the needs of our members."

#### Promote the Program

"We want to work with associations that want to be active and participate in the promotion of the program. Just putting a logo and label on a program is not enough," said Thomalla. "It is really important that an association takes an active role in designing and promoting programs."

The AAP Perio Perks Program is supported by a marketing plan that leverages AAP and its partners. The program includes promotion of the program in the AAP publications. member communications and social media. Additionally, AAP works with its partners on partner approved marketing outreach to members via mail (no email) and presence at the AAP Annual Meeting.

The bottom line: Investment in rethinking an association affinity program can have high payoff not only in membership value but also in terms of added revenue and potentially as a bridge to sponsorships and membership retention. "Our Perio Perks Program revenue is in the low six-figures with an eye on growth but with member value as its priority," said Reese.

Candice Warltier is the founding partner of CS-Effect (formerly CSG). She can be reached at cwarltier@cs-effect.com.







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# Health Care Associations:

Do You Know an Actuary? You Should.

#### **Kurt Wrobel** Chief Financial Officer and Chief Actuary Geisinger Health Care

By Joe Wurzburger, FSA, MAAA

Kurt Wrobel is chief financial officer and chief actuary for Geisinger Health Plan. Wrobel joined Geisinger Health Plan in 2014, having previously worked as a consultant for Milliman and served as vice president of large-group pricing, as well as chief underwriting officer for Humana. He is a Fellow of the Society of Actuaries, a member of the American Academy of Actuaries, and a former chief editor of Health Watch, a publication for the Society of Actuaries.

lose your eyes and picture the U.S. health care system in ten years. Given the constant changes in health care, sometimes it's difficult to picture what it will look like ten days from now let alone ten years. But humor me and give it a shot. You're probably picturing a system where providers are incentivized to keep people healthy, not just treat them when they get sick. One in which the consumer experience is streamlined, and providers have a strong connection to their community, helping with both the financing and delivery of care.

What you're picturing in the future is already happening today, at least in some places. Providers are taking on risk as part of a fundamental shift to value-based care. Of course, taking on risk is not for the faint of heart. How can providers who have been trained to deliver care also effectively take on risk? As you may have guessed by the title of this article, the answer involves actuaries.

Kurt Wrobel is the chief financial officer and chief actuary at Geisinger Health Care. Geisinger is a provider-owned health plan and may sound familiar to you from when Barack Obama touted it as a model for the nation during the early years of his presidency. It's a different kind of place for an actuary to work when compared to more traditional actuarial employers, but it perhaps provides a glimpse into the future. "What makes us a little bit different," Wrobel shares, "is we are vertically integrated. So, we're selling an insurance product as well as providing care. The industry is moving towards this type of model."

The concept is often referred to as provider risk sharing, or value-based care. Instead of simply compensating medical providers for volume, the idea is to incentivize value: Not just waiting for patients to get sick and then treating them but aligning care and finances in such a way that providers are rewarded for keeping members of the community from getting sick in the first place. It's a concept that is very popular in theory.

Theory by itself, however, is not enough, and as is often the case, the devil is in the details. Taking on risk is, well, risky. Providers need to partner with professionals who understand risk.

This is where actuaries come in. Actuaries are the preeminent experts in the business of risk. You wouldn't decide to board an airplane without the benefit of a trained pilot. Similarly, do not consider taking on risk as a health care provider without the guidance of an actuary.

Wrobel decided to become an actuary due to his desire to combine technical skills with business. "To me that's the essence of statistics," he says. "You're taking technical work and trying to apply it to the real world. That's something that's always interested me. When I was an undergrad I majored in economics, which I think is very much in keeping with that interest. I then ultimately got a master's degree in economics and still had that same notion of taking technical math and applying it to real life questions. And I felt the actuarial professional would be the best platform to accomplish that."

You may be like many people to whom I speak, having heard of actuaries but unable to clearly define what they do. Wrobel gives a two-part definition. First, the traditional part of the definition: "Historically, actuaries estimate risk, estimate future uncertainty using statistical models and information to estimate what's going to happen in the future." This traditional work often includes performing functions such as setting premium rates for insurance products or determining necessary reserve levels for an insurance company.

Wrobel continues with the second part of his definition, noting that as health care providers have moved to take on risk, actuaries have broadened the scope of their work to play an integral role in this transformation. "I think we're really expanding what we do in a



"I think we're really expanding what we do in a lot of respects. Think about what we're doing, for example, in medical economics. It's actually looking at the program level, at a specific intervention, to see if a particular program will reduce costs and improve outcomes."

> lot of respects. Think about what we're doing, for example, in medical economics. It's actually looking at the program level, at a specific intervention, to see if a particular program will reduce costs and improve outcomes."

While Wrobel embraces all aspects of actuarial work, it's clear that he is especially inspired by work that falls into this latter part of the definition. Health care organizations are attempting to address the United States' affordability challenge by creating integrated organizations focused on reducing medical costs while providing high quality care. Actuaries are playing crucial roles in this evolution given their longstanding identity as the premiere managers of risk in health insurance.

Wrobel adds that actuaries are particularly skilled at working with data, but not just in a number-crunching sort of way. Actuaries understand the numbers in the context of the overall business environment. "There is a lot of data and information out there," Wrobel shares. "But trying to figure out which data is actually useful, what data is accurate—actuaries are particularly adept at that. People can look at a lot of information and draw conclusions, and in many cases the data is inaccurate or is something that shouldn't be relied upon in order to make better decisions. Actuaries also have a detailed knowledge of regulations and how the health insurance environment works. One of the things that actuaries offer is that ability to connect the dots in a very complicated system to help critically look at programs and other mechanisms to reduce health care costs."

No profession is better suited to guide health care providers in taking on risk than actuaries, who often identify with the phrase, "Risk is opportunity." Actuaries know that risk is not

something that can be avoided; rather it needs to be managed and optimized. Actuaries spend close to a decade on average going through a very rigorous credentialing process that trains them to do just that. They are then held to strict standards of professionalism and are required to obtain a significant amount of continuing education each year in order to maintain and expand those skills to keep up with the everchanging world around them.

Ask Wrobel about how others in the health care system can benefit from working with actuaries, and there is no hesitation. "One of the things, as you see this evolution to more organizations taking risk or considering taking risk is that you're looking at fundamentally different business models. The traditional fee-for-service model is about individuals showing up and providers providing the best care possible for that individual. They then track those dollars and ensure those meet a broader budget for the organization. All of which is very critical.

"But as you see this shift to value and greater risk taking, actuaries are going to be right in the center in helping in that evolution. You start to think about a lot of different things when you start taking risk. You start to think about the size of the population. To the extent that you have a smaller membership base you're going to have greater volatility than you would with a larger membership base. And having an understanding of how that impacts the risk arrangement is extremely important. Other things that are important are understanding the underlying population that a provider organization will be taking risk on and how that could change over time based on the individual incentives that those members face. And having an understanding of that at the product level is important. Understanding that Medicare, Medicaid, commercial, and ACA exchange populations have fundamentally different memberships and fundamentally different risk characteristics that are unique to each of those programs. And to the extent that providers take risk on an overall premium basis, it's going to be even that much more important for providers to understand the intricacies of that risk-taking process."

"It's an exciting time. Actuaries are going to help make that conversion to more value-based oriented products."

So if your association has exposure to the health care system, and you don't know an actuary, you really should. There are plenty of actuaries who are enthusiastic about helping to transform the health care system into one that aligns financial incentives with effective care. Find one today to help pilot your journey into the world of provider risk sharing. After all, risk truly is opportunity. **G** 

Joe Wurzburger, FSA, MAAA, is a staff fellow, health for the Society of Actuaries. He can be reached at jwurzburger@soa.org.





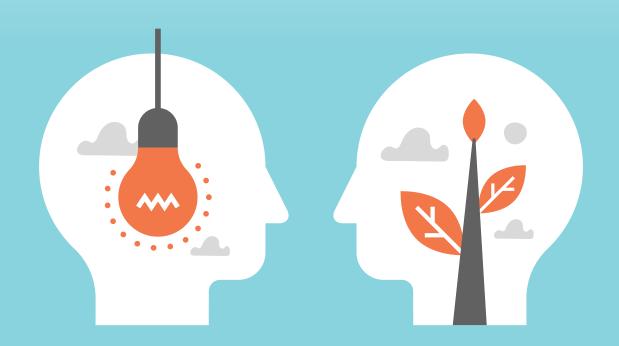
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The next Healthcare Collaborative, "Redesigning the Healthcare System for the Empowered Patient," will be held on July 15, 2019.

# The Mentoring Mix:

# **Optimizing Your Personal and Organizational Mentorship Efforts**

"I realized that searching for a mentor has become the professional equivalent of waiting for Prince Charming." Sheryl Sandberg, Lean In



By **Amy Thomasson** 

he data isn't surprising: Mentorship (or the absence of mentorship) has a distinct, quantifiable impact on your career. According to a Journal of Applied Psychology analysis of 43 mentorship studies, employees that receive mentoring are more likely to obtain higher compensation, a greater number of promotions, and higher overall career satisfaction.

# Personal Mentorship Pathways

If we know mentorship is critical to career success, why are so many professionals struggling to secure mentoring relationships? "As human beings, it's difficult for us to ask for what we want or need, so it's hard for someone to ask another person to mentor them," says Cecilia Sepp, CAE, CNAP, CEO of the 501c League. In fact, the need for mentoring guidance has been especially apparent in association management. "In July 2018, I was reading a post in ASAE's Collaborate community where a member was again asking about a mentoring program. ASAE does not provide one, but requests and inquiries have been made over the years. As I was typing a reply to the person asking the question, I decided I would start a mentoring program to help people connect. I found a need in the market and created a program to fill it. As of January 2019, the 501c League has made 25 mentoring pair matches."

While the pathway to developing meaningful, personal mentoring relationships is unique for every individual, there are four mentor archetypes that have served me well in my career journey that may help to spark some inspiration in you.

# The Impartial Impactor

An impartial impactor is an individual who is not a current colleague but has a strong understanding of your role and industry. He or she can provide you with objective feedback, as there is no personal stake in your results other than the goodwill of guiding a fellow professional. In my journey, that individual is Scott Oser, president of Scott Oser Associates, with whom I was connected via the 501c League. "I think it's valuable and actually recommended for mentees to have a mentor outside their organizations," says Oser. "Someone outside of your own organization will have a different perspective than an insider. They will be experiencing different situations and different people on a regular basis and having that variety in a mentor can be very valuable."

# The Attitude Adjuster

An attitude adjuster is a coach, not a cheerleader. This is an individual whose leadership and positivity inspire you, but

who is also comfortable providing you with a perspective or attitude recalibration when needed. "Your attitude plays a vital role in the outcome of your journey, says Burt Blanchard, independent, a former colleague who also serves as my attitude-adjusting, inspiration-giving mentor. "In keeping a positive attitude, make sure it's a real one, and one of inquisitiveness. Keep your outlook not only to exploration but the joy of possibilities and discoveries. That will drive you to interesting connections, experiences, and outcomes, and that's the message I hope to convey to mentees."

#### The Office Oracle

An office oracle is an individual with whom you currently work. He or she has history and tenure at the organization and can assist you with navigating the unique politics, policies, and personalities of a new organization or role. For example, I joined the Congress of Neurological Surgeons in January, and was immediately paired with my office oracle via the 'CNS Buddy Program.' My buddy has provided me with insight and perspective, as well as a friendly face to smooth what can be a stressful transition.

"The program was established in 2013 in an effort to offer new employees the benefit of having a single point-of-contact to learn the ins and outs of the CNS," says Dawn Davis, director, human resources at CNS. "The program also provides buddies the opportunity to motivate others and enhance their leadership and mentoring skills. Our buddies genuinely care about new employees and want their experiences to be positive and productive."

#### The Path Paver

The path paver is an individual that is further along than you in your desired career trajectory. Path pavers help you see your own possibilities reflected in the journeys of others. Personally, I have had the benefit of connecting with a handful of CEOs, entrepreneurs, and volunteer leaders over the past several years who have served as seminal guideposts at various points in my formative journey, likely without even knowing I viewed them as mentors.

The path paver can be the most elusive type of mentor

as these individuals are in high-demand for mentorship and typically serve in highly demanding roles. While you may not find a singular path paver to meet your mentoring needs, the culmination of wisdom found from even a few brief moments of interacting with one of these leaders can be the impetus for meaningful change.

# Organizational Mentorship Programs

We've seen how mentoring matters on a personal level, so why not provide that same value to your members? Easier said than done when the association landscape is littered with the corpses of dead or dying mentoring programs. Julie Kantor, president & CEO, Twomentor, LLC has assisted associations with mentoring initiatives to drive: millennial retention, diversity, knowledge transfer, and succession planning; and is wellversed in turning around organizational mentoring programs.

## How can associations provide adequate training and support for mentorship program participants?

Kantor: At Twomentor, we feel strongly about creating a community around mentoring as part of annual programming. Associations are a phenomenal place to drive organizational mentoring, and much can be done at conferences as well as national or global webinars. Associations can also train member companies to build (a more wholesale approach) and offer mentor certification trainings.

## How can associations mitigate or avoid unconscious bias in participant selections and relationships?

Kantor: People tend to mentor (and sponsor) in their own likeness. Likewise, people tend to choose mentors who remind them of themselves. Thus, mindfulness and a focus on diversity is critical. A Cornell University study by Kaitlyn Conboy and Chris Kelly illustrated some powerful findings. It showed that mentorship increases the promotion and retention rates of minority men and women by 15-38% over non-mentored minorities. It has been inferred that due to innate biases influence people to help those similar to themselves. Therefore, the lower number of minorities in upper management means that those who do not have a mentor, either organic or assigned, will not benefit due to lack of access.

## What types of mentoring programs and experiences do you recommend? How can organizations think outside-the-box about mentoring?

Kantor: There are a number of options we recommend and assist associations with, including:

- Customized mentor, mentee, and leadership training seminars with an eye on building a diverse and diversely skilled workforce
- Developing a customized mentor action guide and resource tools for your teams, including scheduling third-party partner technology demonstrations if needed
- Education at conferences seminars and webinars around key issues impacting millennial retention, including women in STEM, diversity, men monitoring women in the age of #MeToo, and the business case for mentoring

# Associations Talk: Learnings from 3 Associations with Successful Mentoring Programs

# How would you describe your association's mentorship program?

Matthew Novotny, Senior Manager, Honors & Diversity, Academy of Nutrition and Dietetics:

"The Academy's eMentoring program is an online member benefit that matches mentors and mentees together easily and accurately, while flexibly fitting around unique schedules and communication styles. Participants complete online profiles and choose whether to be mentors, mentees or both. The site provides match suggestions based on commonalities, such as professional areas of interest, practice, number of years in the field, languages spoken, and preferred communication style. Each participant has a bio page that shows all his or her profile information, as well as Academy groups he or she is involved in. Once a match has been established, mentees and mentors can communicate through the site's built-in messaging features or their own communication channels."

## Why do you think so many associations struggle with mentorship program design and implementation?

Michaela Gaviorno, Manager, Member Engagement, American Staffing Association:

"For associations with company memberships, selling the concept of a mentorship program may be met with hesitation by key stakeholders. Some members might be wary of allowing their employees to participate for fear of internal recruiting or sharing company strategies with competitors. Clearly defining

the program mission and purpose to potential participants can alleviate some of these concerns.

Program design and implementation can also be difficult due to expense and time. Providing mentees with a robust mentor directory can become a challenge, especially with a wide array of job titles and responsibilities. It is important to recruit all type of mentors for the program to ensure that mentoring needs are met for all your association's membership base—to the best of your abilities.

Although many associations set out to create mentoring programs that empower staff of member companies to select their own mentors through an online directory, association staff are often tasked with manually matching these relationships. Manual matching is most often experienced within the first year of the program's implementation but can also span longer—even when utilizing software to assist with populating a mentor/mentee directory."

# How has your program pivoted or changed in scope since its implementation?

**Brittany Nagy, MPH**, *Manager, Early Career Member Engagement*, American Academy of Pediatrics:

"The AAP Mentorship Program began offline, and it its early days, it relied on the manual matching of members. In 2014, the AAP partnered with Chronus mentoring software to implement the online platform that is still available to members today. Much like dating websites, the program offers a rating (0-100%) for each match identified by the platform's algorithm, and mentees can prioritize the importance of characteristics (e.g. gender, specialty, location, clinical interests, medical school, etc.) that mentors provide in their profiles, to help the system identify the best matches.

In the past six months, the program has seen significant growth, much of which is due to the implementation of monthly program themes. These themes vary, and past months have focused on women in medicine, applying to residency, and wellness and self-care. A broad marketing strategy drives traffic to the monthly forums, which in turn contributes to increases in membership and mentorship."

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

### You've Found a Mentor, What's Next? 5 Tips for Mentors and Mentees to Enhance Their Interactions (According to Cecilia Sepp)

#### 1. Commit

To have a successful mentoring partnership, both parties need to make a serious commitment. In most programs, including the 501c League, there is a mentoring agreement that outlines roles, responsibilities, and most importantly, the goal of the mentoring partnership. Establish goals and use them as a way to focus the work.

#### 2. Prepare

Always be prepared for your conversations. Mentees should have a list of questions or topics they need to discuss and it's best to send them to your mentor in advance. Mentors should be ready to listen first and talk second

#### 3. Share

Mentors are a great resource and should not be shy about offering opinions and examples from their personal experience. Mentors should also recommend resources to their mentees to enhance their learnings.

#### 4. Develop

While it's great to have a lifetime or career-long relationship, know when to say when. It's possible that a mentor may be great for a year, but then it's time to change to a new or additional mentor to learn or grow in a new direction. It doesn't mean you can't stay in touch; it just means that your personal development requirements are pointing you towards guidance in another direction.

#### 5. Serve

Mentees should always consider becoming a mentor later in their careers to continue the cycle of helping and learning. Think of the concept "each one teach one."

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Kay Whalen, MBA, CAE President 555 East Wells Street, Suite 1100 Milwaukee, WI 53202 Phone: (414) 918-9800 kaywhalen@execinc.com

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# Education





# June 2019



#### Webinar: Leading Learning Innovation 11 a.m. - 12 p.m.



#### Forum Forward 8:20 a.m. - 4 p.m.



#### **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.



Association 101 (Co-located at Forum Forward) 8:20 a.m. - 4 p.m.



Public Policy and Advocacy SIG 9:00 a.m. - 10:30 a.m.



#### 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.



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9 a.m. - 12 p.m.

Through this workshop, you'll learn critical elements of a volunteer relationship system, participate in a series of simulations to enhance volunteer and staff effectiveness and have an opportunity to discuss successes and challenges. Attendees will assess their ability to engage volunteers, map a volunteer management plan that can be immediately implemented and exchange ideas on practices that lead to success and solutions.



#### **CEOnly Summer Healthcare Collaborative:** Redesigning the Healthcare System for the **Empowered Patient**

11:30 a.m. - 5:30 p.m.MATTER, 222 W. Merchandise Mart Plaza, Suite 1230, Chicago IL

An interdisciplinary community of healthcare associations and stakeholders convened to identify pressing issues to address in common, opposed to individually.



# Young Professionals SIG

9:00 a.m. - 10:30 a.m.



**Lippman Connects: Attendee Acquisition Roundtable** 8:00 a.m. - 4:30 p.m.

The Attendee Acquisition Roundtable, facilitated by Sam Lippman, is a one-day information-sharing and networking event for executives, managers, marketers, creative professionals, social media and digital specialists, list/Db managers, research managers, and content developers. Learn how to find, attract, and retain attendees to grow events. Attendees receive a complimentary copy of the Attendee Benchmarks and Trends Study.

# Webinar: Linking In: Using Social Media to Establish the Foundation of Your Personal Brand

11 a.m. – 12 p.m.

During this program, we'll provide you with insight, perspective, and actionable tips to catapult your LinkedIn profile to All-Star status, as well as best practices for engagement and content creation once your All-Star profile is constructed.

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

Shared Interest Group Events



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

# **Promotions** and Changes



Lorne Edwards has been promoted to senior vice president of convention sales

and services at Visit Phoenix. Edwards was previously the vice president of convention sales and services. He joined the organization in 2012 as director of sales following a 16-year career at Hyatt Hotels Corporation, where he served as director of sales and marketing at two Boston-area hotels, as well as associate director of sales at the Hyatt Regency Denver at the Colorado Convention Center.

Association Management Center (AMC) has announced the formation of a new leadership team:



Clay Baznik: Chief Experience Officer Baznik first ioined AMC in

2006 as director of publishing services.



Dave Bergeson: Vice President of Client Relations Bergeson has been with AMC

since 1999. He has previously served as the chair of Association Forum's board of directors.



Jeff Engle: Principal

Mark Engle: Principal Jeff and Mark Engle will retain their roles as principal, focusing on AMC's overall business and operational strategy.



Scott Engle: Principal, Chief Executive Officer Engle continues serving as prin-

cipal while taking on the new role of chief executive officer.



Vish Kalambur: Chief Information Officer Kalambur joined

AMC in 2016 and will retain the title of CIO while expanding his domain to the company as a whole.



Karen Kramer: Vice President of Human Relations Kramer has been with AMC since

1996, first joining the organization as a human resources coordinator.



Mike Norbut: Vice President of Business Development Norbut joined

AMC earlier this year. He currently serves on Association Forum's Editorial Working Group.



John Ozga: Chief Financial Officer Ozga joined AMC in 2007 as finance director.



Steve Smith: Vice President of Client Relations Smith has been

with AMC since 2007. He has previously served as the chair of Association Forum's Professional Practices Committee.

# News and **Awards**

The American Society of Association Executives (ASAE) has announced the 2019 recipients of the Gold Circle Awards, which denotes excellence. innovation, and achievement in association/nonprofit marketing, membership, and communications programs:

#### Advocacy Campaign

American Massage Therapy Association; Addressing the Opioid Epidemic with Massage Therapy

#### Convention/Meetings Marketing Campaign

American Society for Cell Biology; Model Organism Quiz Marketing and Engagement Campaign

#### E-Magazine

Institute for Credentialing Excellence; Credentialing Insights

#### E-Newsletter

Associated Builders and Contractors; CE This Week

#### Media/Public Relations Campaign

Recreational Boating & Fishing Foundation; Shattering the "Bass Ceiling": Moving an Industry to Get Moms Hooked on Fishing and Boating

Member Retention Campaign American Psychological Association; APA Reinstatement Campaign

#### Membership Dues/ Restructuring Campaign

Association for Unmanned Vehicle Systems International: LEAD with Us. AUVSI Restructures to Focus on Advocacy

#### Membership Recruitment Campaign

American Optometric Association; United in Possibilities

#### Member/Volunteer Engagement Campaign

U.S. Apple Association; Munch Madness

#### New Product/Service Launch

Organization of American Historians; Historians and the Media: A Database for Informed Public Opinion

#### **Print Magazine**

American Student Dental Association: Contour Magazine

#### **Rebranding Campaign**

National Ornamental & Miscellaneous Metal Association; NOMMA Rebranding Campaign

#### Sponsorship/Exhibits/ **Advertising Campaign**

The American College of Radiology; Patient-Centered Care Integrated Advertising and Exhibit Campaign

Recreational Boating & Fishing Foundation; Women Making Waves

#### Website/App

American Society for Microbiology; ASM website redesign

# **New AF Members**

#### Individual Members

Jennifer Bethke, IICRC Michelle Brien, WBT Systems Jill Carrillo, Council of Supply Chain Management Professionals

Carson Cross, American Camp Association, Illinois

Toni Diprizio, Plante Moran

Peter J. O'Neil, ASIS International Liz Palm, Protech Associates Gary R. Raczek, Old Second National Bank

Kelly Saling, Visit Seattle Mary Ann Sullivan, American Health Information Management Association Gayle Whitmer, Independent

#### **FORUM Plus Members**

Laura Herrera, Pamela Hollins, Corey Irion, Eugenia Jefferson, Martha-Marie Kleinhans, Janae LeFlore, Amber Meeks, Ayesha Nageeb, John Palmer, Carol Simmons, Leticia Spencer, Rachel Tarach and Tony Vorasorn, American Bar Association

Steven Harris, Phillip Shaffer and Bob Winchester, American College of Healthcare Executives

Ashley Boser, Nivia Boykin, JT Mackey and Eileen Tazioli, American Dental Hygienists' Association

Joy Keller, American Epilepsy Society

Olivia Stephens, American Society of Anesthesiologists

Christian Ballman, American Society of Safety Professionals

Lou Ann Grebenor, Kim Hammond, Justin Jojo, Kris Mayo and Amanda Monto, Association for Corporate Growth, Chicago Chapter

Miranda Walker, Association Management Center

Latrice Warrior, CCIM Institute

Kristi Olson, CM Services Inc., The Association Partnership Company

Taylor Brown and Bridget Terrones, Institute of Real Estate Management

Bill Beers and Elizabeth Randgaard, International Association of Lighting Designers

Lauren Haras, Clare Socker and Tracey Thomas, International Interior Design Association

Julie Fisher, Radiological Society of North America

FORUM Plus Organizations Arthroscopy Association of North America



# **Customized Governance** and Board Development **Solutions**

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- **Board composition**
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- **Board engagement**
- **Board dysfunction**
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- Strategic development
- Governance assessment

Contact Mike Norbut, Vice President of Business Development, mnorbut@connect2amc.com

> Marilyn Jansen, Executive Director of Business Development mjansen@connect2amc.com



#### **Digital Extra**

To access GrowthZone's "2019 Association Industry Survey," visit the digital or mobile versions of FORUM.

# A Peek at Industry Trends

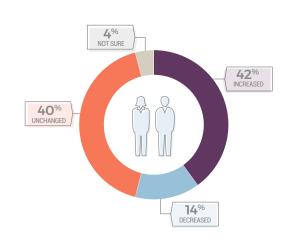
GrowthZone has released its 2019 Association Industry Survey and the results show that while a majority of associations are increasing their membership or holding steady, there's been a 4% rise since 2016 in the amount of organizations reporting decreased membership

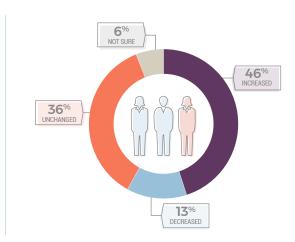
On the digital front, nearly every social media outlet has seen an increase in use from associations since 2016. Facebook rose in usage from 88% to 92%, Twitter rose from 68% to 75% and LinkedIn increased slightly from 57% to 60%. The largest single increase is Instagram, which more than doubled from 17% to 40%. The only decrease in usage was Pinterest, which dropped from 8% to 5%.

The survey asked association professionals to rate how proportionately their board represents a cross-section of their membership. Only 18% indicated that their board had below average or poor representation. Another 18% said their board had excellent representation, while 39% placed their board representation at average. With regard to board performance, respondents were overall positive, with 65% rating their board as above average or excellent and only 6% indicating their board performance was below average or poor.

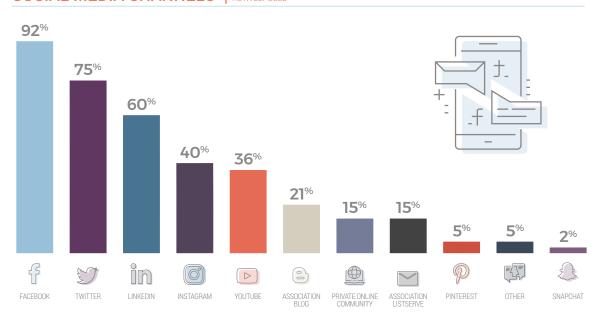
#### ANNUAL OVERALL NET MEMBERSHIP

#### ANNUAL OVERALL NEW MEMBERSHIP





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- Session Tracking/Lead Retrieval/RFID
- Call for Submissions/Abstracts/Speakers with Committee Review
- Session & Speaker Management
- Meeting Logistics & BEO Management
- Banquet/Table/Seating Management
- AMS & CRM Integration

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



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