

# FORUM

JUNE/JULY 2019 V103 N5

INFORMING & INSPIRING  
ASSOCIATION  
PROFESSIONALS SINCE 1916

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### Registrar Extraordinaire: One Woman's Unique Career Journey

Do you remember what you thought you would grow up to be when you were a kid—maybe an astronaut, maybe a doctor, maybe a unicorn wrangler? Chances are your current career looks very different from the plan that your young self envisioned. For Michele Leopold, an entry-level position she took just out of college led her down a fascinating path into the wonderful world of museums.

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BIG PICTURE, ASSOCIATION FOCUS

### Convincing Your Boss: Five Reasons to Add Video to Your Content Marketing Plan

You, a savvy marketer with experience and know-how, understand how important video has become to a solid content marketing strategy, but your boss may still need to be persuaded before making an investment. Luckily, we've got five great reasons that you can bring to their attention to jump-start the conversation.





## Digital Extras

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



- *PCMA and Steelcase Event Experience's* "5,000 People, 5,000 Personal Journeys"
- Insights from Jennifer Hill, American Dental Hygienists Association, on their video content marketing plan

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

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ASK THE EXPERT

## Moving Past Learning Styles and Embracing Learner Engagement

Facilitators of education know that relevant content and actionable information is immensely important to providing good takeaways for their audience, but if that information is imparted through an hour-long, droning lecture, it may float right over the heads of glassy-eyed attendees. The key, according to education expert Aaron Wolowiec of Event Garde, is learner engagement. FORUM spoke with Wolowiec about thinking differently about how material is being presented and better serving the diverse needs of learners.

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## How to Align Your Podcast with Your Association's Body of Knowledge

Just over half the population of the United States has listened to a podcast, and that percentage is growing every year. How can your organization use this increasingly popular format to reach new audiences and engage its current members? The best place to start is the vast Body of Knowledge that you already have at your disposal.

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

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

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# Every Journey Starts with a Single Step

This month's issue of FORUM features an exploration of the fascinating career journey of Michele Leopold, director of collections & exhibitions at The Mint Museum. As association professionals, the paths we travel in our careers are rarely conventional, sometimes bumpy and often directed more by the whims of the winds than the routes we drew for ourselves. My journey to associations was unexpected like most. Having started as a temporary for a trade association in Washington, DC, I quickly realized the value of associations and became fascinated by the positive impact on our society and the collective ability to influence change.



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

At Association Forum, we seek to help our members both grow in their current positions and prepare for their next opportunity. It's important for an attendee to walk out of a session with tangible takeaways that they can implement immediately at their organization, but we also want to provide big picture thinking and thought leadership that can be adapted to new and changing roles.

As part of our dedication to building the next generation of leaders and provide them the necessary skills that will help them climb the ladder to C-Suite, we have made a conscious effort to build programming around early- to mid-careerists. The Emerging Leaders Program, now in its second year, gathers a cohort of rising stars and put them through a rigorous and rewarding 6-month program based on developing leadership skills and putting them in the position to network and learn from established association executives.

Our Association Management Essentials program, featuring six in-depth half-day explorations into core management essen-

tials, are custom-built for association professionals looking to bolster their abilities and grow their knowledge. The program expands on the education provided by Association 101, our cornerstone program for entry-level employees.

When we take a step back and look holistically at the full lineup of education and resources that we provide for our members, we are proud of our concentration on helping association professionals take the step down their career path, wherever that path may lead. And we know that when that route changes, we are there to help them set a new course towards success.

*"The future depends on what you do today."* – **Mahatma Gandhi**

*Michelle Mason*



As part of our efforts to provide a Welcoming Environment™ for our members, we are providing a copy of our Core Values translated into Simplified Chinese 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.

我们致力于为成员提供 Welcoming Environment™（友好环境），作为实现该目标的方式之一，我们在此提供由 **Interpro Translation Solutions, Inc.** 所译的我们的核心价值观（简体中文版）。

### 提供友好环境

作为提供友好环境的社区，我们认同“整体大于部分之和”这一理念，积极寻求扩大社区规模和影响力的方法。与我们互动交流的每一个人都会受到欢迎和鼓舞，可以真正融入社区，全面提升自己，并找到归属感。

### 欢迎创新和高质量

我们乐于尝试新想法、寻求新灵感，无论它们来自社区内外；我们也珍惜每一次改进机会，无论机会大小。我们鼓励开创性的试验并乐见其成；但同时我们也深知何时应该采取制止措施。我们希望能够持续改进。

### 享受乐趣，积极进取

通常情况下，您与同事共处的时间会大于陪伴家人的时间。因此，我们致力于打造一个有趣、积极、整体环境良好的工作空间。

### 开放、诚实的沟通与合作

知之为之，不知为不知，交流学习才能获得新知！所以，有效沟通非常重要。我们应该创造一个可以开放、诚实交流的工作环境，并将打造更好的团队作为目标。因此，我们积极欢迎坦率的交流。我们将紧密合作，为成员创造价值。

### 负有责任感

我们共同负有责任，并希望人们能够以尊重我们的方式提出问题和顾虑。团队互助与合作对工作而言不可或缺，我们彼此信赖和依靠，从而能够快速做出反应，并向利益相关者交付有价值和高品质的服务。

### 用诚信赢得尊重

我们诚信经营，致力于通过自身工作、人才和专业技能来推动所在社区的发展。我们承诺在协会发展壮大的同时造福环境与社会。

# Responding to Subpoenas

**Q:** Subpoenas have been in the news quite a bit recently. What should I do if my association receives one?

**A:** It is not unusual for an association to receive a “third-party” subpoena (i.e., a subpoena issued to an individual or organization other than a party to the lawsuit) for deposition testimony or the production of documents in connection with litigation involving a dispute between competing association members; a dispute between an association member and a supplier, vendor, or the like; or any other dispute not including the association. Even though the association is not a party to the litigation, it has an obligation to respond in a timely and comprehensive manner. Specifically, upon receipt of a third-party subpoena, an association should initiate the following steps:

1. **Assess whether the subpoena has been issued by a court with proper jurisdiction over the association.** All courts that issue subpoenas have jurisdictional limits, which include geographic ranges (e.g., covering the geographic area of the county where the issuing court sits). They cannot legally demand a response outside those limits. Thus, the association should first determine (with the assistance of counsel) whether the subpoena is “valid,”

i.e., whether it has been issued by a court with the authority to require a response. An association that succeeds in its objection to the issuance of a subpoena on jurisdictional grounds generally has no further obligation to provide documents or testimony. For example, a subpoena issued by an out-of-state county or district court may be invalid if it requires action by the association beyond the geographic reach of the out-of-state court. Subpoenas issued by federal courts are somewhat different in that they: (i) must issue from the court where the underlying action between the parties is pending; but (ii) can only require an association representative to produce documents or provide deposition testimony at a location within 100 miles of where the representative works or resides.

2. **Assess whether the subpoena has been served properly on the association.** As a general rule, federal subpoenas need to be hand-delivered to effect proper service. Subpoenas from state courts typically may be served by mail, including in Illinois. To constitute valid service, both federal and state court subpoenas need to include a check covering the required witness fee, payable to the named respondent. The witness fee in Illinois is \$20.00 (plus 20¢/mile for deposition appearances).

3. **Assess whether the subpoena is reasonable, both with respect to its timing and scope.** Most state court subpoenas require at least 14 days advance notice for the production of documents or testimony. The federal rules have a similar response time. In all cases, the association must respond in a timely manner—by providing the information requested or submitting objections—or risk sanctions and/or waiver of any such objections. As a general matter, a subpoena can require the production of any information that reasonably relates to the subject of the underlying lawsuit, regardless of who is being asked to respond. It should be noted, however, that the federal rules expressly require that a subpoena “avoid imposing undue burden or expense on a person subject to the subpoena.” Thus, for example, a subpoena may be deemed to impose an “undue burden” on a third party, like an association, because of the breadth of information it requires or because the information is more readily available from a party to the lawsuit. Some state court rules provide the same or similar protections. In addition, an association may object to the production of information it considers privileged.

4. **Preserve any documents that could be subject to the subpoena.** Once a subpoena has been prop-

erly served, the association has an obligation to preserve any documents and electronically stored information (ESI) covered by the information requests set forth in the subpoena. Accordingly, not only will the association need to place a “hold” on any routine destruction of paper documents, it also must ensure that electronic document deletion, including automatic email deletion, is suspended pending the association’s response to the subpoena. In fact, it is prudent for an association to designate a representative to take responsibility for collecting and preserving all responsive documents.

Upon receipt of a subpoena, associations should consult their legal counsel to assist them in assessing whether the subpoena is valid, has been issued by a court of competent jurisdiction, and provides an appropriate time and location for any response. Counsel also should help to determine the categories and date ranges of information to be produced and whether any claims of privilege or other objections to the production of documents or testimony should be asserted. ■

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



*The answers provided here should not be construed as legal advice or a legal opinion. Consult a lawyer concerning your specific situation or legal questions.*





One hundred thirty one association executives recently received their Certified Association Executive (CAE) credential from the CAE Commission of ASAE, joining more than 4,200 industry leaders worldwide.

**Thirteen of them are from Illinois. Nine of them are Association Forum Members.**

Please join the Association Forum in congratulating them on their major accomplishment!

**Hanna Aronovich, CAE**  
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*Red names denote  
Association Forum  
members.*

## Peering Ahead at Forum Forward

At Forum Forward 2019, held once again at Venue SIX10, attendees were given a glimpse into the future of association management and empowered with tools, education and advice on preparing for the new technologies and realities that will define the next generation of business.



The opening keynote by renowned speaker Neen James revolved around our ability to pay attention and the importance of being present in your work. She recommended splitting your attention into 15-minute blocks, a science-based methodology designed to help you be more deliberate in your choices and actions.

The closing keynote, delivered by Wilson Tang, VP, innovation at Freeman, dove into the advanced technologies that will change the ways associations interact with their members, provide education and gather data. From artificial intelligence to chatbots to the internet of things, these technologies are in full force in the for-profit world and are slowly moving from “nice-to-haves” to “must-haves” for associations looking to stay relevant in the evolving world.

For a taste of these technologies, attendees were treated to an augmented reality simulation, provided by Freeman. Wearing a futuristic headset, an individual was treated to a superimposed computer-generated version of reality (think Terminator) that they could control with their hands.

The breakout sessions at Forum Forward gave attendees an opportunity to delve deeper into the future of association management with sessions on digital mindsets to drive revenue and the changing roles of governance. But of course, as professionals keep an eye on the horizon, it's important to develop the day-to-day skills that they can implement immediately, including maximizing member engagement, association chapter development and a soft-skills course for introverts entitled, “I Hate Meeting New People, But I Know I Need To.” Attendees of that last course were able to test their skills instantly at the Closing Reception.







# **“Ain’t No Woman Like The One SWE’s Got.”**

Congratulations on winning  
the **Inspiring Leader Award**, Karen!

**Team DJG is proud of you.**

Karen Horting, CAE | CEO  
Society of Women Engineers



## All In on the Future at Honors Gala 2019

Every year, association leaders, supplier partners and guests convene at Honors Gala to recognize and celebrate the recipients of the Honors Awards. The event is also the premier fundraising opportunity for the Association Forum Foundation, which is in the midst of an exciting transformation that will provide innovative resources and through leadership for the industry.

In the spirit of the 'casino royale' theme, Michelle Mason, CAE, FASAE, the president and CEO of Association Forum and Mitch Dvorak, MS, CAE, chair of the board of directors, expressed to the crowd that Association Forum was "all in" on the future of association management with the creation of the new Think Tank that will engage the leaders of the association industry in important conversations with the goal of finding meaningful solutions to the most pressing issues.

Guests at this year's Honors Gala were treated to a full casino where they could lay their (play) money on the line at a number of games, including blackjack, poker, craps and roulette, while enjoying the music of perennial crowd-favorite Chicago Catz.

Association Forum would like to extend a heartfelt congratulations to all the recipients of the 2019 Honors Awards:

**Gary A. LaBranche, FASAE, CAE**, president & CEO of the National Investor Relations Institute, recipient of the Samuel B. Shapiro Award for Chief Staff Executive Achievement.

**Burt Blanchard**, association professional, and **James D. Gibson, PMP, PHR**, strategic consultant, technology management, DelCor Technology Solutions, co-recipients of the John C. Thiel Distinguished Service Award.

**Laura G. Davis, CAE**, senior director of membership, marketing and communications, Association Management Center, recipient of the Association Professional Achievement Award.

**Karen R. Horting, CAE**, executive director and CEO, Society of Women Engineers, recipient of the Inspiring Leader Award.

**American College of Healthcare Executives**, recipient of the Welcoming Environment Organizational Award







Way to go, Jim!



Jim Gibson, PMP, PHR

DeCor recognizes our own Jim Gibson, Strategic Consultant, Technology Management for receiving the John C. Thiel Distinguished Service Award for outstanding service to the Association Forum at this year's Honors Gala.

**Congratulations to all  
2019 Gala honorees.**

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# On the Shoulders of Giants

When Gary LaBranche, FASAE, CAE, accepted the Samuel B. Shapiro Award for Chief Staff Executive Achievement, he did so from the unique vantage point of having presented the award to previous recipients as the CEO of Association Forum. In this acceptance speech, reflected on two journeys—his own, and that of the industry to which he’s dedicated his career. FORUM is proud to present his speech in its entirety below.



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

## Shapiro Award Acceptance Speech, June 20, 2019

Thank you. Thank you so very much. I am deeply honored to receive the Samuel Shapiro Award, and to be included alongside the 34 previous honorees.

I knew Sam Shapiro. Sam was a tiny man, yet he was known as the “gentle giant” of our profession. He helped create the CAE program, chaired both the Forum and ASAE and wrote a history of the profession. Sam Shapiro was a giant inspiration to me and generations of others—so receiving the “Sammy” means a great deal to me. I look forward to the day when my successors as Forum CEO, Michelle Mason and Christie Tarantino-Dean also get to enjoy this honor.

Awards allow us to bear witness to each other’s growth as professionals and our development as a profession. Awards are milestones of our progress as a community. And while I deeply appreciate the award, the real reward is looking out and seeing all of you. It is inspiring, and I hope you each get to enjoy this view someday.

I am also inspired by Abraham Lincoln when I say that the world will little note nor long remember what I say here tonight. But the world cannot ignore what you do every day. Your efforts as an association professional, supplier-partner or volunteer leader is important. Because of you, the world is safer and healthier because associations worked to make it happen.

Millions of professionals are better at what they do because associations set standards and codes of conduct, credential knowledge and provide professional development. Buyers find sellers and people with a need find people with solutions because of associations. Associations help make markets and raise capital to advance progress, drive innovation and create jobs. Cures are found, and the arts supported because associations advance those missions. Associations facilitate consensus and forge agreement, fostering civic society and civil discourse. The history of this country was shaped by associations: the abolition movement, women’s suffrage, civil rights and LGBTQ rights were and are advanced by associations. One idea can change the world, and many of the best ideas have come from associations.

Associations are the Freedom of Speech made manifest. The right to freely associate is part of our contract with liberty.

These freedoms have never been more important than they are today.

So, let us re-dedicate ourselves tonight to protect the freedoms that foster civil society. Keeping this promise is the highest honor we can bestow on each other - and it is the greatest service we can perform for our nation.

I am honored that the Chair-Elect of the National Investor Relations Institute is here tonight. Melissa Plaisance, Group Vice President of The Alberston’s Companies, is joined by several NIRI members. They and their colleagues help to ensure the integrity of the capital markets, something that matters to you if you own a share of stock or invest in an ETF or mutual fund. I am privileged to work in partnership with them and alongside NIRI’s incredible staff team, several of whom are here today. I am grateful to work with them all and they all share in this recognition.





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I have been part of some great association teams, including the Association for Corporate Growth and of course the Association Forum. My career has not been a solo adventure. Mentors have guided me over the rough spots. Friends have both pushed me along and encouraged me to slow down. Colleagues have given me the freedom to soar and grounded me in reality. My journey proves that each of us has a stake in the others' journey, for as our colleagues find their way, we find ours.

The one closest to me on my journey has been Karen, my wife of 33 years. Her career has been in nursing: starting out in critical care during the HIV/AIDS crisis in the 80s, followed by 20+ years as a hospice nurse and now as a geriatric care manager. If they gave out awards for compassion and courage, she would have a warehouse full. But she'd likely say that her greatest honor, is, like me, being a parent to our daughter, Catie. Catie attended her first Forum event as a four-year-old in 2003, and I am delighted that she is here tonight. Catie and Karen, thanks for making my journey worthwhile – I love you.

Before I go, I am reminded of a previous recipient of this award, Rod Geer, the long-time CEO of the Million Dollar Roundtable – and past Forum and ASAE chair. Rod was known for his witty sayings – Shapiro and Key award winner Chris Mahaffey calls them “Geerisms.” One Geerism was a metaphor made famous by Sir Issac Newton: that we stand on the shoulders of giants. What Rod meant is that we are able to see more and farther than those who came before us, not because we have keener vision or greater height, but because we are lifted up and borne aloft on the stature of all the knowledge, sacrifice and experience that came before us. Well, that certainly applies to me. I stand tall tonight only because of the shoulders that I stand on. We all do. Thank goodness for that – because only by standing on each other's shoulders can we ever hope to touch the stars.

Thank you.

*Gary LaBranche*

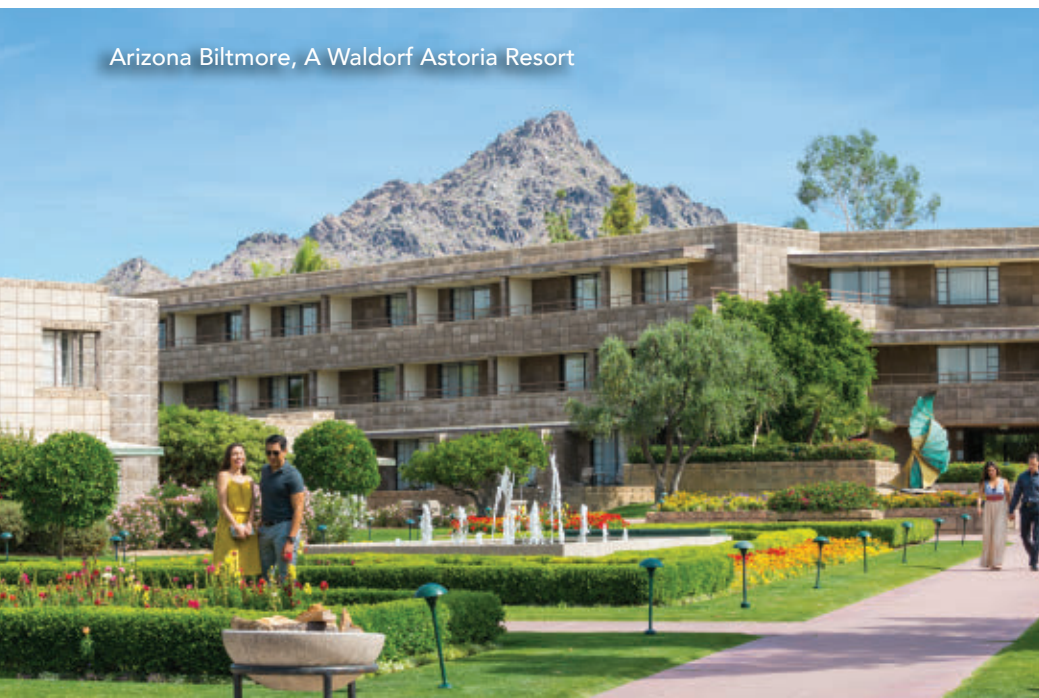




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# What's on the IRS's Radar for 2019?

By **David Siehoff, CPA**

The IRS has been using data-driven decision-making on electronically filed Forms 990, 990-EZ and 990-PF to help make the examination process more efficient. Some potential high-risk areas the IRS has on its radar are described below.

## Education

Organizations with a history of gross income on Form 990, Part I, line 7a and losses on line 7b may be at risk. The IRS has argued that a history of losses on an activity is indicative the activity isn't a trade or business; therefore, the losses can't be used to offset the net income from other unrelated business activities. Although this will be less of an issue for tax years beginning after December 31, 2017, due to Section 512(a)(6)—which requires organizations to report activities separately and limit losses to a particular activity—the IRS has the authority to adjust prior-year net operating loss (NOL) carryforwards.

The Tax Exempt and Government Entities FY 2017 Work Plan (FY 2017 Work Plan) specifically identified the various subcategories for unrelated business income (UBI) that were examined in 2016. These categories included gaming, nonmember income for social clubs (including investment income), expense allocation, NOL adjustments, rental activity, advertising, debt-financed property rentals and investment income.

The IRS views UBI issues to align with its “tax gap” priority. It's prudent for organizations to document the business purposes for any activity that may fall into the history of loss category, ensure expense allocations are consistent and reasonable and confirm the net income for the other subcategories of UBI mentioned above is properly calculated.

## Employment Tax

Employment tax has been a focus area for the IRS for the past several years and aligns with the tax gap priority. Form 990 collects information related to employment tax and compensation in various areas including Part V (lines 1 and 2), Part VII, Part IX (lines 5 through 11) and Schedule J. Organizations should pay close attention to ensure the information reported on these lines is accurate and doesn't raise questions through inconsistencies or mismatching of information. For example, the ratio of the number of Forms W-2 and 1099 reported in Part V may point to a worker classification issue. If contractors are reported in Part VII and professional expenses on Part IX, line 11, but no Forms 1099 are reported in Part V, this may indicate a compliance error.

Schedule J discloses certain fringe benefits for disqualified persons, including whether these fringes were considered part of compensation, if a written policy was followed for payment of these expenses and if substantiation was required. The responses provide insight to determine if an accountable plan is used for reimbursing expenses (which was an issue reported on examinations in the FY 2017 Work Plan) and if these items are properly included in taxable compensation to the employee.

Schedule J also discloses participation in a nonqualified retirement plan. Although disclosing the use of this type of plan may not be a red flag in itself, early retirement incentive plans was an area noted by Margaret Von Lienen when discussing employment tax issues at the Chicago-Kent College of Law conference in June 2018.

Organizations should take time to review their expense reimbursement policies, employee versus independent contractor classification and retirement plans. Failure to disclose or properly report the amount of compensation paid to those considered disqualified persons may give rise to excise tax under the excess benefit transaction rules and create additional employment tax liabilities for the organization.

## Private Benefit & Private Inurement

The FY 2019 compliance program specifically states that organizations showing indicators of potential private benefit or inurement to individuals or private entities may be subject to examination. Disclosures on Schedule L and Form 990, Part IV related to diversion of assets assist the IRS in identifying potential pri-

vate benefit and inurement issues. In particular, the IRS has inquired about loans and forgiveness of loans involving officers and other employees during examination. Although public charities and other exempt organizations are allowed to transact with disqualified persons, it must be at fair market value and not give rise to a benefit to the individual. Organizations with Schedule L disclosures also should disclose a conflict of interest policy on Form 990, Part VI, including the procedures to identify and monitor potential conflicts. In addition, organizations should have policies in place that provide for the rebuttable presumption of reasonableness standards in the context of excess benefit transactions. These policies include a comparability component, approval by those independent of the transaction and documentation the transaction was approved following those procedures.

### Governance


Part VI of Form 990 identifies board composition and best practices for oversight of exempt organizations. The IRS has said in the past that a well-governed organization with policies and procedures that are considered best practices is more likely to comply with federal tax law. Organizations that don't have these policies in place should consider implementing those that are practicable for them. Although these policies aren't required by the IRS, their absence, coupled with certain other transactions reported on Form 990, may provide a red flag to the IRS.

### Organizational & Operational Tests

In recent years, the IRS has brought back the organizational and operational tests to determine if organizations are operating in accordance with their exempt purpose. Part III of Form 990 discloses new and discontinued activities, while Part VI discloses changes in the organization's governing documents. While organizations are permitted to evolve over time, they should be mindful if there's a significant change in their operations or organizing documents that may not exactly align with the organization's original exempt purpose.

### Foreign Reporting

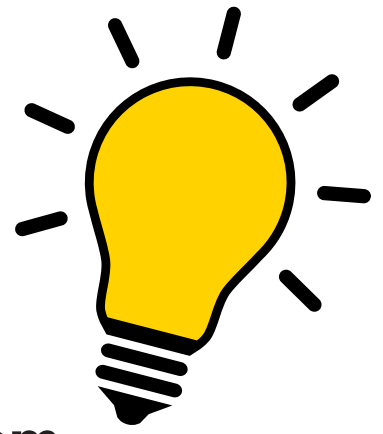
International issues considered a priority by the IRS may be identified through disclosures on Schedule F. Organizations that provide grants to foreign organizations should thoroughly articulate disclosures for their grant monitoring procedures. This can help avoid concerns the organization is a conduit organization or lacks oversight with respect to the use of those funds. Schedule F and Form 990, Part V, line 4 ask questions that disclose ownership or other transactions that may give rise to a foreign reporting requirement. All foreign investments, foreign bank accounts, ownership and transactions with foreign entities should be analyzed annually for proper reporting.

Keep in mind this article doesn't cover every possible high-risk area the IRS may identify. Exempt organizations should take ownership of their tax returns and ensure all information provided is accurate, consistent and complete. 

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# Creating a Culture of Member Engagement from Top to Bottom

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. FORUM is proud to present the best of these ideas.

This part of this series, culled from the session, “Creating a Culture of Member Engagement from Top to Bottom,” looks at how every department contributes to the member experience for associations.

## Information Technology

IT is an enabler of membership engagement. It helps to increase and maintain memberships by gathering and populating pertinent data, identifying opportunities and inhibitors for members and other stakeholders, and ensuring the digital processes needed to build revenue are in working order.

### *Ideas for Member Engagement:*

- It's important for associations to know where IT functions live. Does IT own the full process or does marketing/education/membership support key functions?
- Cross-train all departments on how an organization's technologies work together to create fuller understanding of an organization's digital footprint.

## Component Relations

National organizations need to understand the specific needs of individual chapters, but part of the onus is on those chapters to effectively communicate those needs.

### *Ideas for Member Engagement:*

- Creating chapter toolkits that could be used when a new chapter launches, or when an existing chapter is planning a meeting, in order to maintain consistency of practices across chapters.
- Mentor programs wherein ambassadors from different chapters meet to exchange ideas and best practices. These programs can help develop early-careerists and also foster community between chapters.

## Marketing

Marketing and communications departments are the mouthpiece for the association and hold the key to keeping members informed of resources and benefits available to them, while also driving revenue and membership growth.

### *Ideas for Member Engagement*

- Create automated touchpoints that are personalized and consistent. Ensure that brand messaging is consistent across all departments and anything member-facing.
- Report on communications data so that all departments can understand what is working and what is not and can act upon that data.
- Be diligent in ensuring that messaging is relevant to the audiences that being exposed to those members and potential members who are seeing it.

## C-Suite/CEOs

Organizational culture starts at the top and trickles down to the staff, volunteers and members, so leaders must be cognizant of the culture they are creating and whether those values are being demonstrated across all departments.

### *Ideas for Member Engagement*

- Be intentional about dispersing staff and board members at events—for example, not seating them all at the same table.
- Work with staff on conflict resolution between staff and members, as opposed to jumping in and solving it for them.
- Ask staff to provide you with a list of “must see” members.
- Communicate and model the behavior that you want to see in staff. Incentivize the behaviors and interactions that you deem important.





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The background of the entire page is a photograph of a modern, multi-story building with a light-colored, textured facade. The building has large, angular concrete overhangs and glass-enclosed upper levels. In the foreground, there is a paved courtyard with several round tables and chairs. A large, leafy tree is on the left, and a "Mint" sign is visible on the right. The sky is clear and blue.

# Registrar Extraordinaire: One Woman's Unique Career Journey

By **Nathalie Williams**

*Photo credit: Mitchell Kearney Photography*



**R**aise your hand if you are doing the exact job you thought you'd be doing when you graduated college. As many in the association industry can attest, career paths tend to be winding roads that can take you on a fascinating journey into industries and positions you never knew existed. Michele Leopold, director of collections & Exhibitions at Mint Museum in Charlotte, NC, shared with the FORUM how she found herself in the wonderful world of museums.

**FORUM:** You've held positions in both nonprofit and corporate organizations. How did you get into this line of work? What about your background made this a perfect fit?

**Leopold:** I studied math and German studies in college. I was never formally trained for this line of work. In fact, I had no idea that this line of work even existed!

Fortunately, after college a family friend was working in a placement office in Washington, D.C. and her firm was looking for an entry-level person who was bilingual in German & English. I applied for the job and found myself hired as one of the inaugural staff for a new museum being built in Washington, D.C. Using my language skills was critical for the planning and construction phase of the United States Holocaust Memorial Museum. A colleague who had been hired from the Smithsonian Sackler Museum saw my potential and took the initiative to train me as a registrar. This line of work came naturally to me—passion for the artifacts, passion for the organizational aspects of collecting, the organizing, archiving, tracking, conservation and logistics, the interaction with the donors and lenders. It was such an exciting time! Working in DC, I could connect with other colleagues in the museum field and continued my career path there for 12 years.

Mid-career, when I crossed over to the corporate sector, I took a position as an insurance broker with a firm that catered to clients with fine art—museums, galleries, dealers, artists and private collectors. It was a natural progres-

sion as I had already been working in the field for so long and could speak their language and understand their needs. The math background was beneficial as I built policies catered to their insurance needs.

**FORUM:** What is the best educational background for registrars?

Registrars come from all avenues of education and background. A second language is always helpful especially if you are working with fine art. Project management and strong organizational skills are beneficial to keep all the various projects, exhibitions and daily maintenance of the collection moving smoothly. Interpersonal skills are key as the Registrar interacts with many other internal and external stakeholders: vendors, donors, lenders, museum colleagues. There are many museum studies programs around the United States that offer an MA in Museum Studies and Registrars come out of those programs. But in looking back at my career, it is my opinion that there are others who have the skillset necessary to become a registrar and I often include those people when I am interviewing for any open positions.

**FORUM:** What is a normal day like for you?

As the director of collections & exhibitions here at the Mint Museum, I am no longer involved with the day to day hands on management of the collection, rather the management of the staff who support that function. My team of 12 is comprised of three areas: Registration, Art



**Michele Leopold**  
Director of Collections  
& Exhibitions  
Mint Museum

Michele Leopold is the director of collections & exhibitions at Mint Museum and treasurer for the Association of Registrars and Collection Specialists (ARCS). She has over thirty years of experience in collections, risk management, fine art insurance and project management for cultural institutions.

Previous positions:

Registrar & Collections  
Manager, NASCAR Hall  
of Fame

Vice President, Huntington  
T. Block Insurance/AON

Registrar, The John and  
Mable Ringling Museum  
of Art

Collections Manager/  
Chief Registrar, The Atlanta  
History Center

Chief Registrar, United  
States Holocaust Memorial  
Museum



Installation & Fine Art Services and Exhibition Design.

I work primarily with my Coordinator of Exhibitions to create, disseminate and manage all Exhibition activities. I set the master exhibition calendar and manage all of the exhibition budgets and departmental budgets for my division.

I meet weekly with my fellow senior staff members and our museum director. I review and write exhibition contracts, negotiate traveling exhibition rates, promote our traveling exhibition program, and manage the department heads on my team. I spend time daily meeting with internal colleagues; often the exhibition projects involve the curators, the educators, the marketing specialist and the development staff. We strive to set our exhibition program 3-4 years out from the opening date and coordinating staff to complete these projects within a specific timeframe requires a bit of “people wrangling”. Every day is a new day and it is nice to have a job that is so multi-faceted. There is no such thing as a “normal day” in a museum setting.

**FORUM:** What is the timeframe on rotation of certain objects? For example, do certain works on paper get to stay on exhibit for years or do they have to come down on a schedule? How do you keep track of all of the objects?

Every object has a standard light level requirement and display requirement based on the medium (materials) used to create the object. Paper is perhaps the most affected by light/display but there are also textile objects that are fragile and require more care. Our Chief Registrar tracks all objects in fine art storage, on loan or on display. We rotate paper every 6-8 months, textiles every year and other framed fine art 18-24 months. The registration team has a dedicated database geared to museum collections to track all of the data related to the objects in our care, custody and control. (our collections and loans to us).

Pests are also damaging to objects, so we employ an IPM—Integrated Pest Management—program. The registrars monitor all areas with objects by reviewing pest traps and identifying any insect activity. Being proactive allows us to further protect the collections collaborating with our facilities staff to address any issues before it becomes a problem.

**FORUM:** What have been your most challenging objects to move?

**Holocaust-era railroad car:** Had to move a railroad car from the interior of Poland to the port of Gdansk for travel by sea to the US. While transporting overland in Poland, the railroad car was shunted off on a side railroad track and for about 3 days we “lost” a railroad car! Fortunately, it was located and made it safely onto a cargo freighter headed to Baltimore, Maryland. Once in the States, we stored the railroad car until the construction site was ready to receive it. It was then transported overland on an oversized flatbed tractor trailer. We had a number of structural engineers and rigging companies involved and at the ready on the day we “installed” the railroad car. It was securely rigged and hoisted into the air and placed inside construction site that would become the museum. A waterproof and secure housing was constructed around the railroad car to further protect it during the final construction phases. Once the building shell was complete, the protective housing was removed. The railroad car is significant because it still has the original Nazi paint and markings from the 1940’s. It continues to be an important collection object on display at the US Holocaust Memorial Museum in Washington DC.

**Panama Canal bucket:** The Mint Museum created a traveling exhibition about the building of the Panama Canal. Our curator located one of the three remaining buckets that was used to dig the canal in Colorado. The three-ton bucket was transferred overland and then placed into our galleries here as part of the exhibition in Charlotte. We had to arrange for permits, work with

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“As many in the association industry can attest, career paths tend to be winding roads that can take you on a fascinating journey into industries and positions you never knew existed.”

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the architects, coordinate all of the logistics with riggers and find an overland conveyance that would safely transport the bucket to Charlotte. It was a huge success!

**Oversize framed artwork:** Often museums lend large framed works of art to other institutions. When they travel internationally, they cannot go in a regular commercial air carrier and must be transported by cargo plane. Generally, the museum will require a courier to ride with the crated artwork to ensure its safety door to door. As was the case at the Ringling Museum of Art, I was asked to accompany a large work to Venice, Italy. The crate and I were trucked from Sarasota, Florida to Atlanta, Georgia where we connected with our cargo plane. Cargo planes do not have the amenities that a regular air carrier does. There are only the pilots, a few additional seats, one restroom and the courier. There may also be a veterinarian on the plane if there are horses in the hold. Upon landing in Milan, Italy, the crate and I traveled overland by climate-controlled truck to a terminal near Venice. The crate was then strapped and secured onto a motor boat in the canal and we traveled the final leg of this journey over water to the palace where it was then placed on view. While such a journey may seem glamorous to some people, it can be a nerve-wracking journey should anything go wrong. Door to door this trip took well over 24 hours. The courier needs to be vigilant and advocate for the safety of the art always.

## **FORUM:** What do you see as the most challenging aspect of the career of registrars in the future?

As I am currently sitting in a professional association board meeting as I type this, I would have to say a great deal of conversation has surfaced around the table today about salary inequity. Registrars are required to draft and negotiate legal documents, manage staff, be experts in the field for fine art insurance, have working knowledge of conservation and conservation techniques to properly care for and protect the artwork, keep current with customs shipping reg-

ulations, oversee data entry to record all logistics and historic information and understand the scientific composition of archival materials used in the packing, shipping and storage of objects. In addition, most employers are looking for candidates with advanced degrees, a MA or higher and years of experience. Unfortunately, the salary offered is not commensurate with experience. As an advocate for our field we are looking for ways to provide educational programs or certificate programs to assist our members in lobbying for higher wages.

## **FORUM:** Tell us about your participation in ARCS.

ARCS is a professional association that was formed in 2012 to support and promote the field of registration and collections management specialists. We currently have 1100 members from the United States, Canada, and Europe.

I joined the board of directors in 2014 as the chair for development and worked with a team of three colleagues to raise money to support our organization, educational programs and conferences. In 2016, I was nominated to take over as the Treasurer for the association. I currently sit on the Executive Board as the treasurer and I participate on the Development Committee. My 3-year volunteer term will expire in June 2020.

We are gearing up for our biannual conference to be held in Philadelphia in November 2019 and are very excited by the possibilities that this conference will bring. The buzz on the street is that this conference may be our biggest to date with approximately 850 participants.

Our last conference was held in Vancouver BC in 2017, where we were pleasantly surprised to see over 700 participants. The 2019 conference in Philadelphia is sure to capture a large number of museum professionals in the NE corridor as well as international registrants, so this year is shaping up to be a busy one! 📍

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**Nathalie Williams** is the director, governance at the American College of Prosthodontists. She can be reached at [nwilliams@prosthodontics.org](mailto:nwilliams@prosthodontics.org).

# *Convincing Your Boss:*



By **Amy Thomasson**



# W

ith any technology, there are early adopters, late adopters, and non-adopters. Marketing guru, Seth Godin, calls early adopters the fringe, a tiny group of people who engage with the new, the different, or the risky idea. Eventually, if the concept is powerful enough, it begins to resonate with those around the fringe-loving, until it gathers enough momentum to go mainstream.

According to Wyzowl's fifth annual "The State of Video Marketing" survey conducted earlier this year, 87% of marketers are using video in their promotional toolkits. It's safe to say that video marketing is well past the fringe at this point. In fact, if your organization is not adding video to your 2020 marketing vision, your content strategy is in danger of being myopic.

Those of you in content development roles are likely aware of this, but that doesn't mean you don't face challenges getting the rest of your team on board. If you need extra support getting your C-suite to approve your video marketing plan, these five reasons will help you get your proposal across the finish (dotted) line.

## 1. Video Commands Attention

Michael Hoffman is the CEO of Gather Voices, a company that has created a platform that enables associations, charities, and other organizations to more easily add video to their marketing mix. "Whether we like it or not, people are reading less and watching more. Video is essential simply because it's where people spend their time." The statistics back up Michael's thoughts. Cisco's latest Visual Networking Index states that by next year, video will account for 79% of all consumer internet traffic. If you want the best opportunity to reach your members where they 'live,' you need to reach them via mobile phone, tablet, or laptop with compelling video content.

But what about embedding video within other forms of communication, such as an eBlast or eNewsletter? Can video assist with improving steadily declining open rates? The good news is that this is also a resounding yes. According to Experian's Digital Marketing Report, when the word 'video' is used in an email subject

line, open rates double and click through rates go up two to three times. Most importantly, however, not only are viewers watching, they're also lingering longer on video than other forms of content, with many marketers reporting that video has increased viewer dwell time leading to increased content absorption.

## 2. Video Establishes Connection

Associations thrive on creating community through connection, although geographic disbursement, increased demands, and decreased discretionary time all present potential barriers to this connection. Waterkeeper Alliance is a global nonprofit organization dedicated to clean water that has found a way to utilize video to establish powerful connections with their audience. Maia Raposo, communications & marketing director, "Since Waterkeepers Alliance is an advocacy organization, engagement and emotional responses are critical for us. Our videos are centered on issues-focused content. We aim to create a sense of place and an emotional connection."

Waterkeeper Alliance has achieved this powerful connection through their SPLASH video series, which helps viewers feel a personal connection to America's waterways through demonstrating the joy of engaging in water-based activities like swimming, paddling, and boating, while also successfully integrating a series partnership with Toyota.

An advocacy organization like Waterkeepers Alliance has a clear message and call to action, so what can more traditional associations do to establish the same sense of connection with

“For associations, video is a way to build trust by putting forward the voices of the membership rather than the voice of the brand. It enables you to make the organization come alive through the voices of your members.”

members? Since we’ve already established that the majority of online traffic comes from video, we know that there is plenty of space for a wide variety of video content, and association can easily start by reaching out to members to create their own videos, or user-generated content. User-generated videos are more memorable than other forms of media, and are also excellent for establishing the next point.

### 3. Video Builds Trust

“We’re in a world where trust has been eroded,” says Hoffman. “People don’t trust government or media, and they don’t trust brands or institutions, including associations. They trust their peers and the lived experiences of people like them doing similar work. For associations, video is a way to build trust by putting forward the voices of the membership rather than the voice of the brand. It enables you to make the organization come alive through the voices of your members.”

Trust is the base upon which membership, event attendance, and product purchases live. Content marketing is the antithesis of advertising, as it is based in trust. The Content Marketing Institute defines content marketing as “the art of creating and distributing relevant and valuable content to attract and engage a target audience with the goal of driving profitable customer action.” How do we create relevancy, value, and ultimately action? We create it through consistency and trust.

### 4. Video Increases Conversions

The National Nonprofit Technology Network (NTEN) is a trade association that provides a

community for those interested in the use of technology to support nonprofits, and they have seen continued success and quantifiable return on investment through their video marketing program. “We use video to promote our educational courses, and our annual Nonprofit Technology Conference on our website, through email, and on social media,” says Erin Adams, digital marketing manager. “In one recent use, we found that including a course instructor’s video link in an email increased the email’s click rate by 75% and boosted the average course registration by 33%.”

NTEN isn’t the only organization up-leveling their conversions. User-generated video content consistently results in higher web conversions than campaigns or websites without video regardless of organization size or type. Interestingly, this also applies to in-person sales. An analysis from Aberdeen Group and Brightcove found that organizations using video require 37% fewer site visits before an individual responds to a call to action. Thus, by increasing your video traffic, you can decrease your sales team’s foot traffic!

### 5. Video Breaks Barriers

Now that you’re armed with statistics and real-life stories for your C-suite, the final step is to anticipate and prepare to answer their questions about barriers to entry. Isn’t it time-intensive, knowledge-intensive, and costly to produce and distribute video content?

Erin Adams says, “You don’t have to be a video expert to produce compelling video. Start with the basics and keep testing to see what resonates with your members. If you’re requesting video, refine your ask so that the objectives



and technical specifications are clear from the start, and offer incentives for partners who record video for your organization. Add captions to improve accessibility and for optimal social media viewing, and prepare for additional elements like title and end cards for brand visibility, and share additional information or context.”

Technology like the Gather Voices platform can assist with making this easier. “We have 350 member groups in 44 countries, which makes hands-on or in-person video work difficult,” says Raposo. “Through an easy collection, management, and publishing technology, we have been able to hand over video to volunteers on the ground and cut out production costs.”

As with any well-branded video, we will end where we began, with a final thought courtesy of marketer, Seth Godin: “Marketing is the act of making change happen. Making is insufficient. You haven’t made an impact until you’ve changed someone.” Now go forth and use the evidence provided above to convince your boss, your team, and your organization to invest in video as an essential component of your marketing mix. 📺

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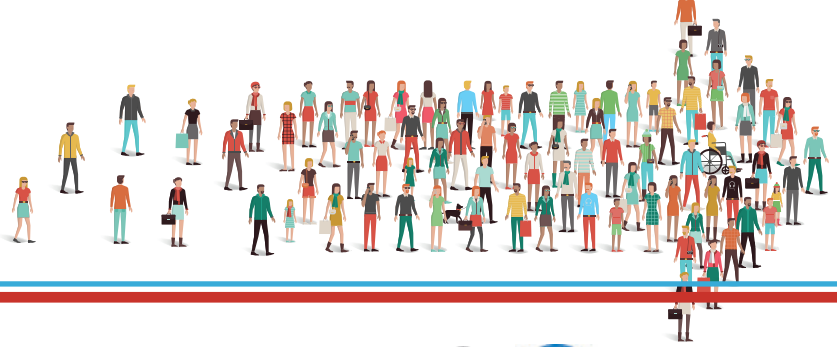
**Amy Thomasson** is director, marketing for the Congress of Neurological Surgeons. She can be reached at [athomasson@cns.org](mailto:athomasson@cns.org).



## Digital Extra

This wouldn’t be a proper video marketing article without a companion video! See the digital edition of this issue of FORUM Magazine for insight and perspective from Jennifer Hill, co-director of development and membership engagement at the American Dental Hygienists Association—another association successfully implementing video into their content marketing plan.





## The Essentials of Association Management



Association Forum is proud to present the Association Management Essentials series, designed to meet the growing needs of your entry - and mid-level employees. This series consists of half-day explorations of core management essentials to build your team's potential! A certificate of completion will be awarded to those participants who complete the entire series. For those seeking a refresher, you can also register for individual courses. Best of all, completing the program earns you 15 CAE credit hours!

### Upcoming Essentials Courses:

- August 1st – Finance for the Non-Finance Professional**  
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- September 11th – Ins and Outs of Association Law**  
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# Moving Past Learning Styles and Embracing Learner Engagement

By Dan Shea

**Aaron Wolowiec**  
Chief Executive  
Officer  
Event Garde



Aaron Wolowiec, MSA, CAE, CMP, CTA, is a learning strategist and meetings coach for leading trade associations and individual membership societies across the United States. Committed to the latest research and trends on learning, intentional networking environments and meaningful transfer exercises, he launched Event Garde, a professional development consultancy, in 2011.

**T**he competition for associations members' attention is fierce, both in terms of their attention spans and where they go to seek relevant content and education. The days of droning, hour-long lectures are (hopefully) behind us, but what is replacing them and how can associations capitalize on the changing needs of learners? FORUM posed these questions to Aaron Wolowiec, CEO of Event Garde, a thought leader in education who is obsessed with understanding how people learn.

**FORUM:** How can associations serve their members' educational needs by better understanding how their education preferences?

You have probably heard all about learning styles, such as the VARK methodology or some other methodology where we're thinking about visual learners, auditory learners, read/write learners or kinesthetic learners. There's a variety of these types of methods. When I teach about these concepts, I often ask, "Which style of learner are you?" Then I pull out this book called *More Lies About Learning*, a collection of perspectives on organizational learning edited by Larry Israelite. In it, there are couple of paragraphs that really remind us that this idea around learning styles has been repeatedly disproven in research by many solid studies, but it's a notion that remains pervasive. In fact, I went to my doctor's office last year and randomly one of the questions they asked is, "What type of learner are you?"

People think that it makes sense and it sounds like a thing, but there's no evidence to suggest that if you present content in a visual way to a kinesthetic learner, they're going to learn it any better or worse than if it were presented in a kinesthetic way. It's not to suggest that people don't have preferences, it's just that there's no correlation between learning better or learning worse when something is presented inside or outside of the style that you prefer. I'm not suggesting that you shouldn't present

content in different ways or consider the preferences of your learners. I just think you need to provide a variety of sensory tactics during education sessions—sound, sight, taste, smell, touch—to encourage more innovation and engagement in the learning environment.

**FORUM:** What are some ways facilitators can engage learners in different ways?

You have to think about the different senses that can be used to engage. Are there colors and graphics that bring a visual element to the education? In terms of sound, is there music? When we think about learning spaces, particularly in person, the biggest space in the room that is difficult to fill is the air, but you can fill the air with both sound and scent, such as with an essential oil diffuser. With the element of taste, I normally have mints or candies— and at larger events there might be any variety of F&B opportunities. Then, there are the tactile elements such as paper, markers, toys, fidget spinners, stress toys and the like.

Really what we're trying to do by engaging the senses is interrupt the brain from taking shortcuts. When a learner walks into a classroom and sees a classroom-style set or crescent rounds, their brain has been trained over time to jump to conclusions and essentially find the shortest distance between two points. In this instance, the brain might be quickly processing the following internal thought: "I know what this environment is. I've seen it before. I know what to expect and I can probably check out because



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“Associations need to be the synthesizer of the best of the best content, as opposed to being a repository for everything there is to know on a topic... people have less time to focus, read and engage than ever before, so we have to be the people who shine a spotlight on the specific content they need to know.”

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“I’ve been here and done this at other similar sessions.” If we tee up the brain differently and suggest to people that this is unfamiliar, then the brain doesn’t know what to expect. As a result, the likelihood of engagement is greater.

It’s certainly important to understand that there are different ways to access content. People can ascertain information visually through their eyes, or auditorily through their ears or kinetically through their hands and body. There’s no one option that is right for every situation. It’s about providing as much variety in a single session as possible without overwhelming the learner, because at the end of the day some people are going to like some elements and approaches more than others. If you provide enough variety, there should be a little something for everyone and it’s going to break up the concept into more manageable, bite-sized pieces.

Beyond the style elements, you have to be aware of the learner’s attention span. There’s a lot of different benchmarks for attention spans—in *Brain Rules* by John Medina, he suggests that the brain is ready for something new every 8 to 10 minutes and we should be changing our modality, approach or content. I’ve heard this number as low as 6 or 7 minutes. I don’t know that there are hard and fast rules to go by, but what I do know is if we’re lecturing for on for an hour on a webinar or we’re droning on for 75 or 90 minutes in front of a classroom of association professionals, that’s not going to get the job done. It’s not going to hold their attention and it’s not going to effectively deliver content that results in workplace application.

### **FORUM:** Is there a replacement for learning styles?

I think that the replacement for some of those learning style methodologies is the opportunity for participants to practice. In thinking about how to best build presentations, many of the aspirational models suggest that the first thing you should do is capture people’s attention, so identifying different strategies early on in a presentation to do so is often the first step. Another step is to provide meaningful opportunities for

participants to practice newly-learned content. It’s not just about telling you that this is a good model or takeaway or tactic, but then to allow you the opportunity to practice in the session, whether that’s working in a small group or on a case study or developing a model or action plan individually.

### **FORUM:** What does it mean to engage learners?

I wrote an ebook with Tracy King in 2017 called *Engaging Learners: A Guide to Successfully Designing Engaging Learning*, and part of our thesis around engaging learners is a three-step model. Step one is creating a partnership. I can’t just ‘do learning to you’ as a participant. There needs to be a partnership between you as the learner and me as the facilitator of knowledge, and so figuring out ways to identify and build that partnership is key.

The next step is this idea of individualization or personalization. Content really has to be personalized to the learner. If I’m just talking about theoretical membership models at a session, that might be great, but what really helps the learner effectively process the information is for it to be personalized. They should be asked to identify their membership challenge, and then given time to consider how the application of the content that’s being presented could actually improve their scenario.

The last step is application and behavior change. Can the learner visualize how they’re going to apply this information when they return to their office? Will it have a meaningful impact on their behavior moving forward? It’s one thing to sit in a session and have an active partnership with the speaker and think about how the content relates to you, but it’s something completely different to go back to your organization and actually apply that information to the scenario in question or to share the takeaways and action plan with a colleague or supervisor.



## **FORUM:** How can associations better understand their audience and use that understanding throughout the planning process?

You need to start with a diverse stakeholder group that includes speakers, target audience members, staff, board members, sponsors, exhibitors—whomever you need to include to ensure that you have a well-rounded group. Those stakeholders then become your ambassadors and cheerleaders when it's time to market this event. I think that's an important place to begin. You need their buy-in and their understanding of the process that went into developing this event to help spread the word when the time comes.

Moreover, associations have to be on the leading edge of what's innovative, unique and different. This necessitates an iterative process whereby everyone who's involved in the stakeholder group is adding, changing, editing and deleting when it comes to brainstorming and planning.

A word of caution: I think that a lot of times our association events try to copy and paste—I saw this at another event, how can it fit here? But every association is so different, that if we try to simply “copy and paste” and ignore why those specific formats or approaches worked elsewhere, they may or may not work in our specific environment. If you see something that's really cool, dig in to why that approach or format is successful, learn from it, and then make the necessary adjustments to ensure success for your association and your learners.

One model that association professionals may be familiar with is the design thinking approach, which is intended to evaluate what you have right now (What is?), what could the future look like if you made a change (What if?), what change might have the biggest impact (What wows?), and how that change will influence or affect learners in the marketplace (What works?). This is a great, systematic model that can be used to help facilitate conversation with a diverse stakeholder group—particularly when everyone has their own opinion about how a meeting or event should look or feel.


## **FORUM:** How associations can still be leaders in resources and education when so much is readily available online for free?

When I think about how associations can position themselves as education leaders, the two things I emphasize are cura-

tion and pathways. What I mean by curation is associations need to be the synthesizer of the best of the best content, as opposed to being a repository for everything there is to know on a topic. We often fall into the rut of thinking that more is more, but people have less time to focus, read and engage than ever before, so we have to be the people who shine a spotlight on the specific, hyper-focused content they need to know.

The second part, pathways, is all about personalization. When I go to any association website, I would stake money on there being some sort of education calendar with all the upcoming events listed by date. That's great, but in terms of how people navigate their particular pathway and determine which of those events are really meaningful for them to attend and which aren't, that's a different story altogether.

Typically, when we talk about pathways, we talk about two different pathways. The first is career stage pathways—early career professional, mid-career professional, senior career professional. What are the information, resources and education I need in order to be successful at my current career level (and, incidentally, at my next career level)? The other pathway is by function—membership, meetings, and governance. Whatever the functional area may be, what's the basic knowledge and foundational content I should know? From there, the content increases in sophistication until you have obtained the highest-level resources and takeaways. In this way, you're tee-ing up content in a way that's more of a journey and less of a choose-your-own-adventure. This provides more direction and understanding of what professionals in a specific career stage or functional area need to know. If they are already aware of the basic knowledge, then they can move on to the next level, but providing that pathway to follow is really important to the learner experience.

In this way, associations should see themselves as almost concierges or college advisors. When I went to Michigan State University, I had an advisor who sat down with me and helped me plan what I would take each semester and each year through graduation. In a similar way, associations can be that guide. By positioning themselves as an advisor, organizations can be more successful in engaging their members—getting fitted for the education that will best suit them. This often has a ripple effect into other areas of associations such as continued membership, the purchasing of resources or even becoming more involved as a volunteer. 

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**Dan Shea**, is the content + publications manager for Association Forum. He can be reached at [shea@associationforum.org](mailto:shea@associationforum.org).



# How to Align Your Podcast with Your Association's Body of Knowledge

By **Jason Meyers**



our association has defined its Body of Knowledge (BoK)—concepts and competencies for people to successfully work in the profession or a specific job. You’ve also made the BoK part of your education strategy. Now it’s time to turn it into content that is relevant and appealing to your audience.

One of the first places to turn is podcasts. They are an excellent way to engage audiences hungry for digestible knowledge.

According to Podcast Insights:

- There are over 750,000 podcasts
- 51% of the U.S. population has listened to a podcast
- 49% of podcast listening is done at home; 25% in the car
- 80% listen to all or most of each podcast episode and they listen to an average of 7 shows per week.

Podcasts can be produced inexpensively, depending on decisions you make regarding recording equipment and editing platforms, among other variables. There also are plenty of resources to guide you on how to produce and host podcasts.

Still, podcasting can be challenging for associations. How do you keep content fresh and interesting while remaining relevant to your industry? And how do you incorporate the Body of Knowledge without boring your audience?

“When we launched our podcasts in 2016, we began with our Body of Knowledge,” said Holly Amatangelo, director of education of the Legal Marketing Association. “In fact, all of our content—our magazine, blog, webinars—map back to the BoK. It’s relevant to our audience because it addresses the skills they need to do their jobs well.”

Amatangelo spoke on a panel recently during a recent Association Media & Publishing lunch and learn session held at the Chicago office of the association management and services company SmithBucklin. The panel fielded questions from how to get started in podcasting to how to make it sustainable. During a breakout session, attendees helped each other brainstorm ways to improve their podcast content.

“It can be daunting for an association to commit to a podcast series,” Amatangelo said. “But we’re finding—after 41 episodes—that engagement is increasing and it’s dovetailing nicely with our other offerings. Plus, we are finding a seemingly endless supply of topics and people to feature.”

## Where to Start

Having an established content strategy ensures alignment and relevance across all of your organization’s channels: publications, newsletters, social media, blogs, websites, videos, etc. Podcasts are just another tool in your communication arsenal

to effectively engage, educate and inform both current and prospective members, as well as broader communities of industry professionals. So make sure you are purposeful in determining what content is ideal for the podcast format, who the audience is, and what outcomes you want to achieve.

Following are four simple approaches to developing compelling podcast content:

### Interview an Expert

The best insights come directly from the source. Listening to an expert’s perspective helps connect the audience with that person on a more personal level. Listeners will hear the expert’s passion for a topic—something you can’t express in print—and they discover what drives the expert. Associations are filled with these subject-matter experts. Just ask them. By the way, your conferences’ speakers and panelists also make great interviewees.

#### *Listen-spiration:* SIGGRAPH Spotlight, Episode 6

The Association for Computing Machinery’s Special Interest Group on Computer Graphics and Interactive Techniques (ACM SIGGRAPH) produced this podcast interview of two Pixar Animation Studios executives about the history and future of computer graphics research.

### Be Current

What’s happening in government, business, entertainment, pop culture, or technology that affects your industry? Be newsy and topical by creating podcast episodes that correlate with specific events or trends. Educate your listeners with critical background information. Examples include upcoming legislative agendas, movie releases, product announcements, or major holidays.

#### *Listen-spiration:* WDMA Open & Close Podcast, Episode 7

Following the government shutdown, two executives from the Window & Door Manufacturers Association (WDMA) discuss the outlook for critical issues that could impact the window, door and skylight industry, including trade and tariffs, energy and regulatory policies, and emerging state issues.



“Podcasts are just another tool in your communication arsenal to effectively engage, educate and inform both current and prospective members, as well as broader communities of industry professionals.”

### Tell a Story

Everyone enjoys a good story, and it's even more captivating when told first-hand in your ear. A podcast has the ability to capture stories in powerful ways. It just takes a little legwork to track down these stories. Start by asking your members questions that elicit story-telling answers. How did you get involved in your profession? How did you make a difference for a client, customer, or patient? What compelled you to take the particular education series?

*Listen-spiration:* The NSGC Podcast Series, February 2019


Genetic counselors discuss the importance of self-care to prevent burnout in their field during this podcast on The National Society of Genetic Counselors' (NSGC) website.

### Support Your Community

Integrate your podcast with events and initiatives in your organization. If you host an annual conference, conduct interviews with attendees or speakers pre- or post-event. Giving listeners an inside look at events can bolster registration and prove the value of attendance. Go in-depth with the author of research, books, or webinars on timely and relevant topics in your industry.

*Listen-spiration:* LMA Podcast, Episode 41

An author and researcher share insights and best practices about innovation, collaboration, and transformation within the legal marketing field during this Legal Marketing Association (LMA) podcast.

There are a lot of variables to address to make your organization's podcast fit your mission and the needs of your unique audience. Done well, podcasts can be a highly effective component of an integrated content strategy. 

**Jason Meyers** is senior director of content strategy for SmithBucklin. He can be reached at [jmeyers@smithbucklin.com](mailto:jmeyers@smithbucklin.com). For more insights, subscribe to the SmithBucklin Content Blog.

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Episode 12: Neen James

Episode 11: Linda MacLachlan

Episode 10: Christie Tarantino-Dean

Episode 9: Stephanie Leese Emrich

Episode 8: Henry S. Givray



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## July 2019

**JULY  
24**

### **Joint Communications/Marketing SIG: Low-Budget Marketing Strategies and Tactics for Associations** 9 a.m. – 10:30 a.m.

*Innovation is a powerful and necessary tool to help your organization stand out from the rest. While many champions of innovation may be upper management, this interactive innovation lab will teach you how to lead using innovation as a young professional within your organization.*

**JULY  
25**

### **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.*

**JULY  
25**

### **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.*

**JULY  
30**

### **#2's/COOs SIG: Flipping Project Management on Its Head** 9 a.m. – 10:30 a.m.

*Join your peers for a session that will explore why traditional project management principles do not always apply in association management and how to modify your approach to achieve your objectives.*

## August 2019

**AUG  
1**

### **Association Management Essentials: Finance for the Non-Finance Professional** 9 a.m. – 12 p.m.

*During this course, you will enhance your financial acumen by learning how to examine and analyze financial statements, discuss how to prepare and monitor a program budget and review Form 990. This course is designed for non-financial professionals and will give you the tools to manage a program or department budget.*

**AUG  
6**

### **Component Relations SIG: Project Management for Chapter Staff** 9:00 a.m. – 10:30 a.m.

American Society of Anesthesiologists  
1061 American Lane, Schaumburg, IL, 60173

**AUG  
8**

### **Webinar: Moving Your Conference From a Single Property to a Convention Center** 11 a.m. – 12 p.m.

*Is your attendance growing? Do you need larger exhibit space? Discover the next steps you will take when utilizing a convention center.*

**AUG  
28**

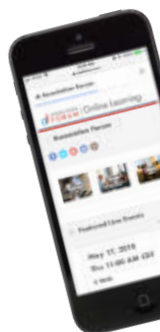
### **Association 101** 9:00 a.m. – 4 p.m.

OLC Education and Conference Center,  
9400 W. Higgins Road, Suite 100, Rosemont IL  
*An orientation for association professionals, Association 101 is designed to provide a solid foundation of knowledge and appreciation for the unique environment, culture and dynamics of associations.*

**AUG  
29**

### **Education SIG** 9:00 a.m. – 10:30 a.m.

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



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● Education Events ● Shared Interest Group Events ● Webinars

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



## September 2019

SEPT  
9

**IMEX Healthcare Collaborative Roundtable**  
10 a.m. – 12 p.m.  
Sands Expo Convention Center, 201 Sands Ave,  
Las Vegas, NV 89169

SEPT  
10

**CAE Study Group - Downtown**  
Held weekly on Tuesday evenings  
from 5:30 – 8 p.m.

NOV  
19

*Increase your chances of passing the CAE exam by joining the CAE study group, which provides in-depth preparation for professionals preparing for the CAE exam. Facilitated by current CAEs, the study group meets weekly for a structured case-study series based on the nine domain areas.*

SEPT  
11

**CAE Study Group - Suburban**  
Held weekly on Wednesday evenings  
from 5:30 – 8 p.m.

NOV  
20

1061 American Lane, Schaumburg, IL,  
60173-4973  
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SEPT  
11

**Association Management Essentials: Ins and Outs of Association Law**  
9 a.m. – 12 p.m..  
*During this course, you will learn about governance, tax, contracts, intellectual property, and antitrust. You will laugh. You will cry. You will come away knowing a lot more than you do know about legal issues for non-profits. This course is designed for non-legal professionals and will give you an understanding of laws impacting your work and your association.*

SEPT  
12

**Webinar: Jagger, Madonna, Beyonce, Bieber: Setting the Stage for Each Generation to Shine**  
11 a.m. – 12 p.m.  
*Discussed in this session are the influences and messages that helped formulate the attitudes, expectations, and values unique to each generation, as well as how organizations can better align products and services to meet differing generational needs.*

SEPT  
18

**Meeting Professionals SIG: Co-located at PCMA Chapter Quarterly Meeting**  
9 – 10:30 a.m.  
Loews Chicago O'Hare Hotel, 5300 N. River Road, Rosemont IL 60018

SEPT  
25

**CEO Exchange: Crisis Communication**  
9 – 11 a.m.

## October 2019

OCT  
15

**Association Management Essentials: Membership 360**  
9 a.m. – 12 p.m.  
*This course will frame your Membership Strategies from a holistic perspective, and help you approach evaluating your programs and communications from a Member Value perspective, while providing real-world examples you can take back with you.*

OCT  
22

**Public Policy and Advocacy SIG**  
4 – 5:30 p.m.

OCT  
22

**Joint Governance/Membership SIG**  
9:00 a.m. – 10:30 a.m.

OCT  
30

**Leveraging Emotional Intelligence to Up Your Leadership Game**  
9 a.m. – 12 p.m.

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### Calendar Legend

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## Promotions and Changes



**Melissa Walling, IOM, CAE**, has joined the American Library Association (ALA)

as director, membership and customer service. Prior to joining ALA, Walling was the vice president of membership and education for Association Forum. Previously, she held leadership positions at the American Academy of Pediatrics and the Institute of Real Estate Management. Walling is a past recipient of Association Forum's 40 Under Forty Award and was recognized by Association Trends as a Young and Aspiring Association Professional Award.



**Michael Dominguez** has been named president and chief executive officer of

Associated Luxury Hotels International (ALHI). Dominguez joins the organization from MGM Resorts International, where he served as senior vice president and chief sales officer for the past seven years. He is a past chairman of the International Board of Directors for Meeting Professionals International (MPI) and has served on the boards of the U.S. Travel Association (USTA) Executive Committee and the American Society of Association Executives (ASAE). Dominguez was also a member of the Las Vegas Metro Chamber of Commerce Board of Trustees.



**Colleen Bagnasco, CAE, CMP**, has joined Association Management Center

(AMC) as executive director of meetings. Previously, Bagnasco spent 17 years in senior-level roles at the Society of Actuaries (SOA), most recently as the senior director, events. She has a Bachelor of Science in Hospitality Management from Roosevelt University and currently serves as the vice chair of Association Forum's Meeting Professionals SIG.



**Gayle Irvin** has been hired by Association Management Center (AMC) as

the executive director of the Association of Rehabilitation Nurses (ARN), the organization's founding client. Irvin has 18 years of experience in healthcare association leadership, including as vice president of affiliate affairs and member services at the American Osteopathic Association (AOA), associate executive director at the American Society of Colon and Rectal Surgeons (ASCRS) and vice president of administrative services at the American Board of Oral & Maxillofacial Surgery (ABOMS).



**Joél Payne** has joined Association Management Center as executive director of

professional relations and development. She was previously the director of corporate development for the American Association of Diabetes Educators (AADE). Prior to joining AADE, Payne held multiple

positions at the American Society of Plastic Surgeons (ASPS) and the Plastic Surgery Foundation, including director of development, and held several sales manager positions at AT&T Corporate and Ameritech Corporate.

## News and Awards



**Carol McGury** has been named to the 2019 Notable Women Executives Over

50 list in Crain's Chicago Business Magazine. McGury is executive vice president, event and education services at SmithBucklin, an organization she first joined more than 30 years ago as an entry-level associate. She is the current chair of the PCMA Foundation and a member of the Marriott Hotel Advisory Board and Destinations International Partner Advisory Council.



**Carlos Cardenas and Jay Cariño, MBA, CAE** have been named 2019-2021 Diversity Executive Leadership Program (DELP) scholars by the

American Society of Association Executives (ASAE). DELP is a two-year program that supports individuals from under-represented identity groups to advance into the ranks of leadership in the association management profession. Cardenas is director, information technology at the National Board of Certification and Recertification of Nurse

Anesthetists. Cariño is the vice president, member services at the Association of Nutrition & Foodservice Professionals.



**Patricia V. Blake, FASAE, CAE** has been selected as a nominee to serve as the chair

of the ASAE and ASAE Foundation boards for fiscal year 2020, which begins on September 1. She will assume the chair position after serving as chair-elect. Blake is the CEO of the Heart Rhythm Society and has previously served as the chair of the Association Forum board of directors.



**Stephen P. Stahr, IOM, CAE**, has been selected as a nominee to serve on the

ASAE board of directors for fiscal year 2020. Stahr is the CEO of Million Dollar Round Table and has served as chair of Association Forum's CAE Working Group and as a member of FORUM's Editorial Working Group.

## In Memoriam



**Craig Busey, JD**, passed away in May at the age of 72. He had recently retired

as general counsel for the American Dental Association (ADA). Busey was a well-known and tremendously respected member of the not-for-profit legal community. After earning his J.D. degree from Northwestern University School of Law, he began his career as an associate for McDermott, Will & Emery, where he eventually rose to partner. Over the

course of his career, Busey also served as general counsel for the American Dietetic Association and as a senior litigation counsel for United Airlines.

## New AF Members

### Individual Members

**Jennifer Bethke**, IICRC

**Michelle Brien**, WBT Systems

**Melissa Burkholder**, Illinois State Bar Association

**David Butler**, Naylor Association Solutions

**Jill Carrillo**, Council of Supply Chain Management Professionals

**Carson Cross**, American Camp Association, Illinois

**Mark Davino**, JP Morgan Chase

**Jill Davis-Vetter**, Visit KC

**Toni Diprizio**, Plante Moran

**Karen Durante**, NACM Connect

**Brian Frankel**, American College of Surgeons

**Sharon Galler**, STAT Association Management

**Chris Hodges**, Naylor Association Solutions

**Jacque Jambrone**, RSM US LLP

**Pratik Kalaria**, Bank of America Merrill Lynch

**Judy Kent**, Explore St. Louis

**Gail Luxenberg**, Tuft & Associates

**Leigh Madden**, Public Communications Inc.

**Erica McNamara**, American College of Surgeons

**Claire Moore**, International Carwash Association

**Kirsten Moss**, Hubb

**Peter O'Neil**, ASIS International

**Kerry O'Riordan**, Higher Logic

**Liz Palm**, Protech Associates

**Gary Raczek**, Old Second National Bank

**Kelly Saling**, Visit Seattle

**Annie Storey**, American Academy of Pediatrics

**Mary Ann Sullivan**, American Health Information Management Association

**Rebecca Thomson**, Thomson Real Estate Group

**Lisa Weisenberger**, American Medical Technologists

**Gayle Whitmer**, Independent

### New FORUM Plus Members

**Liz Catalano**, American Association of Diabetes Educators

**Gerald Daliva** and **Adam Walaszek**, American Association of Nurse Anesthetists

**Kelly Pacini** and **Janelle Walker**, American College of Foot and Ankle Surgeons

**James Glasheen** and **Natalia Hernandez**, American College of Healthcare Executives

**Kathy Lovato**, American Dental Association

**Jennifer Brummet**, American Epilepsy Society

**Karen Buehring**, American Health Information Management Association

**Melissa Walling**, American Library Association

**Sean Jolie**, American Medical Association

**Catherine Powers**, American Orthopaedic Foot & Ankle Society

**Molly Guastella**, American Society of Safety Professionals

**Cora McCarron** and **Claire McKeown**, American Specialty Toy Retailing Association

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

**Colleen Bagnasco**, **Pamela Ball**, **Anne Gramiak**, **Alyssa Griffith**, **Gayle Irvin**, **Kelly Kellerman**, **Colleen Murphy** and **Joél Payne**, Association Management Center

**Randi Flowers** and **Kesha Shah**, Bostrom

**Jalen Collins** and **Heidi Garcia**, CCIM Institute

**Peter Payerli**, Emergency Nurses Association

**Gina Borgman**, Institute of Food Technologists

**Tom Jacks** and **Rebecca O'Brien**, Institute of Real Estate Management

**Marissa Pascual**, International Association of Lighting Designers

**Angela Armijo**, National Association of Personal Financial Advisors

**Jill Noble**, National Restaurant Association

**Abdechafi Boubkir**, Radiological Society of North America

**Sona Camara**, REALTORS Land Institute

**Jeremy Crystal**, Selected Independent Funeral Homes

**Yuliya Loginova** and **Stephanie Phelan**, Society for Vascular Surgery

**Lindsey Powell**, Society of Gynecologic Oncology

**Angie Myers**, Turnaround Management Association

**Christopher Wochos**, Water Quality Association



### Digital Extra

To access PCMA and Steelcase Event Experience's "5,000 People, 5,000 Personal Journeys," visit the digital or mobile versions of FORUM.

## Peeking Behind the Curtain at PCMA's 2019 Convening Leaders

Conference feedback surveys can provide great insights for an organization as they plan for future events, but the Professional Convention Managers Association (PCMA) is taking that one step further by releasing a full report from their 2019 Convening Leaders event. The report, "5,000 People, 5,000 Personal Journeys," was created by a team of Steelcase Applied Research + Consulting and Event experience experts who observed and documented participant activity, interviewed attendees and tracked a variety of patterns and dynamics onsite.

In releasing this report, PCMA is taking the bold step of allowing itself to be used as a live case study—an exercise in true transparency that reveals both the positive and negative feedback they received. The result is an immensely valuable document filled with interesting insights that meeting and association professionals can use when analyzing their own events.

Below are some of the insights from the report, including a mix of direct attendee quotes and observations from the Steelcase team. For full context and a deeper dive, see the full report at [pcma.co/5000journeys](http://pcma.co/5000journeys).

*"I wish the parties were more spread out over different days, so I could attend more of them or stay longer. It feels so rushed trying to get to everything."*

*Networking was effectively facilitated through focal points, prompts and shared experiences (i.e., claw machine, dessert display, lunch discussion cards) but could have been better supported through the physical space (with the exception of a few specific areas: Braindates space, lounge seating next to PSAV Inspiration Café).*

*Color-coded map was effective for individual navigation, however three of the colors were too similar to distinguish.*

*"I understand that the topics need to be relatable for a variety of people, but I've been in the industry for a long time and haven't found much lately to challenge my thinking and push me. I would like to feel like I learn more each time I come, but realistically, I'm here for the networking."*

*People commented on the different configurations of these spaces and how this inspired and informed the way they approached the learning spaces within their meetings.*

*Participants commented on the informal, fun atmosphere of the Braindates space and felt it added to the experience. The use of bright colors and lounge seating made the space interesting and inviting.*

*"I love how there is so much to do in between sessions. It really makes the whole event seem like a party."*

*Many participants brought coffee cups, food and personal belongings into sessions, however there was no place to put these items unless you used the chair next to you.*

*People will sit anywhere, whether a chair is present or not.*



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