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## Burning Issue: A Neurosurgeon's Tips for Avoiding Workplace



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Understand about Their  
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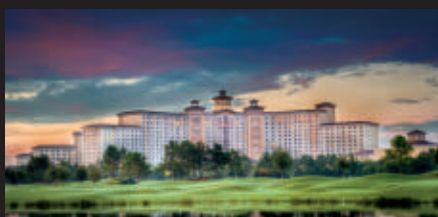
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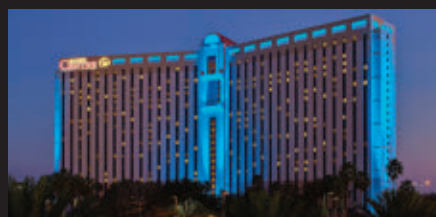
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## Burning Issue: A Neurosurgeon's Tips for Avoiding Workplace Burnout

Being busy can be a good thing—it can mean your business is booming and that you're being trusted with myriad important responsibilities. But being too busy, or not knowing how to balance your schedule and stress, can lead to burnout, which can have a negative effect on your work and your health. In this article, FORUM explores how to combat burnout by examining the techniques used in the medical industry.

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When exploring new non-dues revenue opportunities, is your association considering the benefits of pursuing grant funding? The process may be competitive and require patience and hard work, but the outcome can provide a great opportunity advance your organization and its mission. Susan Vogel, an expert in the subject of grants management, explains how associations can be ideal grantees.



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It's a precarious time for destination organizations. From coast-to-coast and across the seas, governments and watchdog groups are keeping a close eye on any budgets that involve revenues from taxpayers. FORUM spoke with Don Welsh, president and CEO of Destinations International, about how CVBs can stay relevant by connecting with their communities, and the work Destinations International is doing through advocacy and research to support the industry.

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### What CEOs Need to Understand about Their Technology Executives

The bridge between what a CEO expects from an association's technology chief, department and partners may be wide and confusing. With digital transformation pushing organizations to analyze their technology platforms, it is crucial that CEOs learn to collaborate with not only their technology executives, but also the strategic partners who help provide member value.

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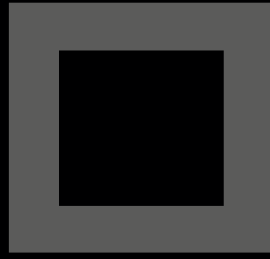
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# Partners Make It Possible

At Association Forum, we are fond of saying “Partners Make It Possible.” It’s a phrase you’ll find on our media kits, in our email signatures and across a variety of supplier agreements. We use this phrase to qualify that we view our supplier members as an invaluable part of our business and our industry. We use the word “partner” with purpose. Our affiliation with our supplier members is a reciprocal relationship, one that we highly value and respect, because we truly could not do all that we do without the support of our partners.



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

Our partners make it possible for us to provide consistently high levels of education for association professionals. Our partners make it possible for us to gather CEOs together at the Healthcare Collaborative for important conversations about the future of medicine and healthcare in the U.S. Our partners make it possible for us to put on networking receptions where members can connect with peers, colleagues and future employers. Our partners make it possible for us to establish new programs aimed at closing the gaps around diversity and inclusion in the association industry with our Welcoming Environment initiatives.

We also know that the world is changing and that we too need to support our partnerships. On page 34, we interview Don Welsh of Destinations International. In recent years, publicly-funded destination organizations have faced increased scrutiny, making it more difficult to make large investments. Welsh and his team are working diligently to provide research and advocacy that will help these CVBs continue to demonstrate their incredible value to the communities that they serve.

We have introduced a number of resources aimed at supporting our partners. We updated our Economic Impact Study to quantify the value of the association marketplace in Chicago. That study demonstrated that our members represent

more than 40,418 association professionals from nearly 1,725 Chicago organizations—a 4% increase from 2012. These organizations serve 29 million individual members, who could fill Soldier Field nearly 240 times.

We have also heard the call for better data on the meetings market in Chicago. To that end, we launched an initiative to help planners and partners better understand the value and metrics of the meetings that are produced from our community. This program, the Association Industry Meetings Metrics (AIMM), is a vehicle that provides real-time data and intelligence on the meetings market in Chicago. ([www.associationforum.org/browse/aimm](http://www.associationforum.org/browse/aimm))

For the second year, we are proud to include a stand-alone, printed version of our Buyer’s Guide with the August issue of FORUM. We encourage our members to use this guide as resource when seeking business services of any form. No matter your business need, just turn to the Buyer’s Guide and find that partner who will help make it possible.

*Michelle Mason*

ASSOCIATION FORUM’S  
**PARTNERS** *Make it* **POSSIBLE**



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

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



## Equal Pay Act Amendments

### Q: Do the new Illinois requirements about asking job applicants their salary histories impact associations?

**A:** In an effort to close the wage gap between men and women, Illinois Governor J.B. Pritzker recently signed a new law making it illegal for Illinois employers to ask job applicants (or their previous employers) about their salary history. This new law is an amendment to Illinois' existing Equal Pay Act of 2003 (Equal Pay Act) and will go into effect on September 29, 2019.

Under the new law, it is illegal for an Illinois employer (or employment agency) to (i) screen job applicants based on their current or prior wages or salary histories (including benefits or other compensation) by requiring that an applicant's wage or salary history satisfy minimum or maximum criteria; (ii) request or require a wage or salary history as a condition of being considered for employment or for an interview, continuing to be considered for an offer of employment or as a condition of an offer of compensation; (iii) request or require that an

applicant disclose wage or salary history as a condition of employment; (iv) ask an applicant's current or former employer for the application's wage or salary history; or (v) retaliate against an applicant that fails to comply with the employer's wage or salary history inquiry.


Not all salary discussions are barred. While Illinois employers may not inquire about an applicant's wage history, they may provide an applicant information about the wages, benefits, compensation or salary offered in relation to a position and engage in a discussion with the applicant about his or her expectations with respect to compensation. If, in the course of those discussions, an applicant discloses or voluntarily shares his or her current or prior wage or salary history (including benefits or other compensation), the employer will not be in violation of the law. However, if the employer considers or relies on an applicant's voluntary disclosure of their current or prior compensation in determining whether or not to give the applicant the job or in determining the compensation package offered, the employer will have violated the Equal Pay Act.

The new law also prohibits an employer from preventing or seeking to prohibit employees from disclosing or discussing information about their own wages, salary, benefits or other compensation. If, for example, an association's employee handbook or policies prohibit or discourage such conversations amongst employees or others, it should revise those policies to avoid violating the new provisions of the Equal Pay Act. It is important to note, however, that the law does not prevent an employer from requiring its HR professionals, supervisors or other employees whose job provides access to the wage and compensation information of its other employees to maintain the confidentiality of such information.

The consequences of violating Illinois' new law are severe. Employees may bring a civil action against employers for and are entitled to seek and recover actual damages, special damages up to \$10,000, injunctive relief, costs and attorney's fees. In addition, employers also are subject to civil penalties of up to \$5,000 for each violation.

Illinois is not alone in adopting laws that prohibit employers from asking job

applicants about their prior salary history. Multiple other states have adopted similar provisions.

In light of these requirements, associations should review their job applications, interview questions, hiring processes, compensation practices, employee handbooks and policies and make any changes necessary to ensure they are in compliance with the laws in their state. 

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*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.*



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# Economic Confidence Abounds for Association Executives

By **Dan Shea**

Optimism is at an all-time high for association executives, according to the 2019 Edition of the Economic Impact on Associations Study, Part I, from McKinley Advisors. This rosy outlook is most prevalent in the executives' view of their own organization, with 88% reporting they feel positive or very positive about the direction of their association. The optimism is translating directly to membership retention rates (or perhaps vice versa)—82% of organizations reported a retention rate of 80% or higher. Further, 81% of organizations indicated their retention rate increased or stayed the same over the past 12 months. That's the highest rate since the inception of the study in 2010, a time in which the Great Recession had dropped that figure to 50%.

"While the renewed emphasis on value and broader economic conditions has translated into strong membership trends, many of our clients acknowledge the challenge of growing competition, the pressure to demonstrate return-on-investment, and many other factors that impact member acquisition and retention," says Shelley Sanner, CAE, senior vice president, industry relations at McKinley. "It is a critical time for associations to look beyond traditional audiences, products and services to identify opportunities for diversification."

## Effects of the Economic Shutdown

The survey was fielded in January of 2019, when the U.S. was in the midst of an extended government shutdown. While only 22% of organizations reported that the shutdown had affected their association in a meaningful way, double that amount indicated that their members were feeling its effects. To alleviate the burden on those members, several organizations took tangible action, such as extending deadlines for membership renewals, registrations, grants and scholarships, offering free access to online learning opportunities, or directly engaging with the government to advocate for an end of the shutdown.

In light of the unsteady circumstances, coupled with general apprehensive feelings about the current social climate in the U.S., the overall optimism could be seen as a surprise, but participants revealed that their positivity is a result of the elements they can control—internal factors like new organizational

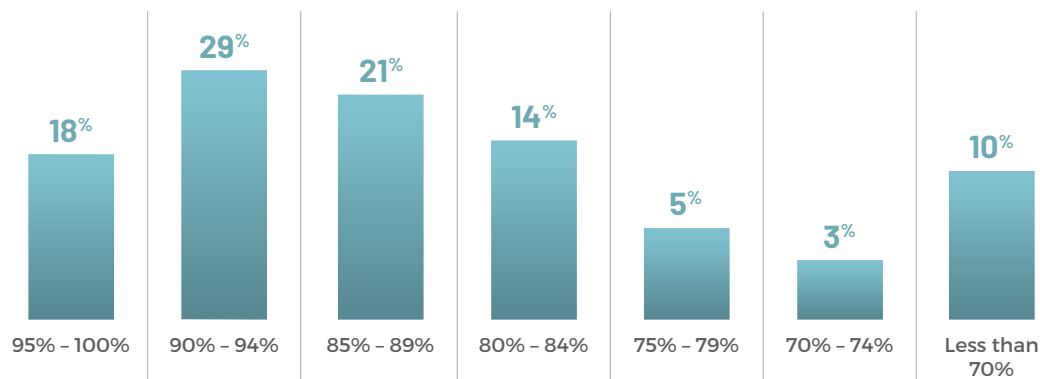
strategies, strong executive staff leadership and high-functioning boards and/or volunteer groups were the top three reasons they felt optimistic. Those who reported pessimism did so due to consolidation within their industry, new competitors or disruptive threats, or a forecasted slowing or decline in the economy.

## Strategy Plays A Key Role

A solid strategic vision is a necessary part of keeping associations nimble and allowing them to navigate both good and bad econo-

## WHAT IS YOUR CURRENT MEMBERSHIP RETENTION RATE?

TOTAL RESPONSES: 123








## Digital Extra

To access *McKinley Advisor's* “2019 Economic Impact on Associations Study,” visit the digital or mobile versions of FORUM.

mies. A resounding 92% of the organizations have a formal strategic planning process, and the majority (56%), assess that plan every three to five years, while 34% of organizations perform that assessment annually. When it comes to bringing that plan to life, 72% said that they were effective or very effective at adhering to the priorities outlined in the strategic plan. The biggest disconnect was in helping staff to understand how strategic priorities translate into day-to-day work, with only 58% of organizations rating themselves as effective.

“Associations report declining effectiveness when it comes to translating a strategic plan into more granular areas of everyday practice, which is not a surprise to many of us,” says Jon Hockman, CPF, FASAE, principal at McKinley Advisors. “More and more, associations are acknowledging the challenges they face when it comes to implementing strategy—not just at the level of organizational processes and activities, but also with the staff at every level who are pivotal to making the plan a reality.”

It may be difficult to predict the direction of the economy over the next three, five or ten years, but association executives can control how prepared their associations are by building and communicating a strong strategic plan. 

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To view the full report, and past years' editions of the Economic Impact of Associations Study, visit [www.mckinley-advisors.com](http://www.mckinley-advisors.com) or the digital version of FORUM. Part II of the study, which will take a deeper look at common, effective strategies to increase engagement and loyalty, will be released this fall.

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# The Future of Healthcare Meetings and Education

On Episode 14 of the CEOly Podcast, Association Forum's president and CEO sat down for a rich, thought-provoking interview with Dave Lutz. The conversation touched on the evolving needs of medical and healthcare conferences, including the need for fresh takes on the peer-reviewed abstracts. Below, FORUM presents just a part of that conversation. For the full interview, download and subscribe to the CEOly Podcast on iTunes or Stitcher.

**Mason:** Recently, you wrote an article on patient-centered care conferences. To start, what is a patient-centered care conference?

**Lutz:** The idea of patient-centered care really comes from the Affordable Care Act—the next evolution is having reimbursement subject to patient outcomes, as opposed to treatments. There's no question that when you talk to people who are looking at how to improve the U.S. healthcare system, being performance-based is an area that they believe is the next horizon. While we're not quite there yet, they do believe that that's the direction that people are moving in. I think what's happening in the medical space is that it's definitely becoming more of a team sport. It's more team-centered care that's focused on the patients versus the focus being on the actual treatment and reimbursement.

**Mason:** How are associations responding to this new, evolving trend?

**Lutz:** Many scientific and healthcare meetings are taking a good, hard look at their future and trying to decide how can they be relevant moving forward. Often, science is published in journals and you wait 30 days to get the latest and greatest peer-reviewed articles, as opposed to what we get at meetings. I think what many healthcare associations are seeing is some adjustments in their exhibits and sponsorships. There's a lot of cutbacks on investments and exhibit footprints, because healthcare exhibitors are trying to decide if that's the most effective way for them to get noticed and to hopefully increase their exposure or be more prescribed.

In most industries, that's okay, because sponsorship is such a great outlet and it's a growing revenue stream for many of our customers, but it's not so prevalent in healthcare because due to all the rules and regulations. What we end up getting is less effective investments in advertising and the like. The revenue business models are getting somewhat disrupted in many healthcare conferences. That's also playing out in another way where many pharmaceutical and medical device companies previously paid significant, mostly non-member rates to bring international contingencies to some of the larger healthcare conferences. What we've seen through analyzing numerous years is that those numbers have gone way down and those revenues, which were once significant, are now much less for almost every major healthcare conference.

**Mason:** I read in an article that you wrote that you believe that peer review for conference abstracts is inefficient and stifles innovation. Why do you believe that?

**Lutz:** Peer review is very much an inefficient, yet very accepted, form of publishing. What we see with most medical conferences, upwards of 50-60% of the attendees are actually on the program. We call those meetings, 'speakers speaking to speakers.' What happens is that many of those conferences will accept abstract submissions, then usually a certain portion, maybe 10% or so, might become what's called oral abstracts. Those are basically sessions where there's one abstract after another in rapid fire with very little collaboration.

Then, almost all of the rest of the submissions are accepted, but they are put on as poster presentations. So, the quality filters are very low. Usually, for most medical or healthcare conferences, they're accepting almost every single submission, but everybody's paying that full rate. When you start peeling back the layers of the onion and you examining who's coming, then we start seeing some of the business model challenges. What many of these conferences have become is more academic and scientific conferences. They're primarily professors at universities, students and residents. What you see very little of is the mid-career professional who's doing a lot of the work. You're also seeing a lot less private practice participation, because a lot of private practices, whether it be dentist offices or family practices, are becoming part of larger hospital systems or networks, because they can't afford to do many of the little things that are required to keep up with regulations and insurance.

The big question that is being raised is how much healthcare conferences should focus on advancing the scientific needs versus how much should they focus on patient-centered matters or practice improvement areas, which may not be CE qualified.

**Mason:** How is technology impacting this evolution and empowering patients?

**Lutz:** There's telemedicine and patients are increasingly being given the ability to monitor your own healthcare. Many of these things are very new and we haven't seen the full impact on how they evolve care. The impact on meetings and healthcare associations is going to be more lagging. No question, you can't fight it. You need to find ways to enable it and to learn from it and help your members learn, because it is the future. Patient





### Dave Lutz

Founder & Managing Director  
Velvet Chainsaw Consulting

*Dave Lutz is the founder and managing director of Velvet Chainsaw Consulting, a business improvement firm that helps conference and trade show organizers grow or transform their major face-to-face conferences. Prior to going down the consulting road, Dave was with Experient for 22 years, where he served as president of both the Meeting Planning and Registration divisions. Dave is a frequent industry speaker and for over twelve years, he has authored a monthly column in PCMA's Convene magazine on performance improvement for annual conferences and trade shows.*

empowerment is a big deal in the health insurance space in particular. They want patients to take more control of their own health and we're seeing large amounts of money being put into these initiatives. On the technology side, there's entire conferences that are being created around investments in healthcare technology. It's like the wild west right now, and I think there's going to be a lot of changes coming forward.

**Mason: What are your thoughts about the future of learning? With these trends and issues, are you optimistic?**

**Lutz:** For the most part, the individuals who pursue the healthcare field do so because of a passion for making a difference, and with that comes a very strong commitment to learning. What I think is awesome about healthcare is that it takes special people to be in that profession. They need to go through years and years of learning, which helps set them up as lifelong learners more so than other professions.

We've done a lot of research recently on peer-review, returning to that topic for a moment. There was a gentleman by the name of Michael Jubb, who wrote a research article called, "Peer

Review: The Current Landscape and Future Trends." He put forth this idea that there's growing opportunities for researchers to publish non-peer-reviewed articles for review in an open environment. That really struck us when we were doing research on the efficiency or inefficiency of peer review. We realized that many scientific journals will cover research that has been completed—and completed is the key term—but most conference abstracts, ideally, should cover work that's in progress.

I think the future for healthcare education, especially from the scientific angle, is to look for work that's in progress and make that work better in an open environment. If you go to healthcare conferences and you sit in these rooms where these abstracts are being delivered, you're getting peppered with information. Each abstract might be 13 minutes with 60 seconds of Q&A, and then here comes another one. There's five or six in an hour and a half. Researchers are proud of their work and can't wait to present it, but it would be great if they went in with the perspective of seeking improvement for work that is in progress.



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# Promoting Literacy at Forum Forward

In conjunction with this year's Forum Forward, Association Forum was proud to once again partner with Tourism Vancouver for a Corporate Social Responsibility project to engage our community for the purpose of benefiting those in need.

This year, the beneficiary of the CSR project was Open Books, a nonprofit social venture that promotes literacy through a variety of programs that provide innovative instruction and safe learning environments for practice, exploration and social-emotional growth, as well as access to high-quality books and tailored curricula.

The efforts of Open Books are supported by the sales of donated books, so Tourism Vancouver and Association Forum planned and executed a competition wherein our members were encouraged to coordinate an office book drive, with the organization that collected the most books per employee being awarded the Grace Cup. In all, 11 organizations participated and there were over 4,000 books donated through the book drive.

We are thrilled to announce the winner of the Book Drive competition, the **Association of Nutrition & Foodservice Professionals**, who collected 440 books, or 18 per employee. The organization will be presented their trophy in December at Holiday Showcase 2019.

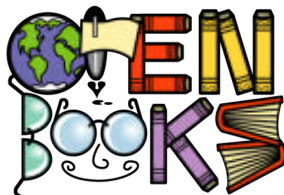
Thank you to all the organizations and individuals who stepped up to make this initiative a rousing success. Special thank you to Rachael Riggs, CMP, manager, meeting & convention sales, Chicago & Midwest US at Tourism Vancouver for her leadership on the Book Drive and her boundless enthusiasm for giving back to the community.

## Associations Serve Book Drive

*Donate Books to Support Children's Literacy Programs*

Total number of books/books per employee as of 7.19.19

	1069/6		197/1
	686/3		194/9
	482/17		192/4
	440/18		167/2
	300/6		66/1
	278/4		
			<b>4,071</b>
			Total collected





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# How to Think About Retiring

By **Brian Haney**

Close your eyes for a moment and think about how you would like to retire? What do you see yourself doing? Who are you doing it with? Are there sandy beaches involved? How's the sun feel on your face? Looking forward to tee times at noon? Trips across the world you'd always wished you could take? How does that carefree Paris wine taste? Or maybe it's the simple joy of a house devoid of kids, not needing to slug into work, and the chance to start dating your spouse once again. Coffee really does taste better when it's not rushed after all. Now open your eyes and ask yourself this simple question: how much does all that cost?



**Brian Haney, CLTC, CFS, CFBS, CIS, LACP**

*Founder & Vice President  
The Haney Company*

*Brian Haney, CLTC, CFS, CFBS, CIS, LACP is the founder and vice president of The Haney Company, providing employee benefit plans, comprehensive property and casualty insurance and affinity programs for the association marketplace. Founded in 2012 with his father Allen, who is an ASAE Fellow, they deliver high level advice to guide associations down the best path forward.*

## The Picturesque Retirement

Did I ruin it? Hopefully not. Dreaming big dreams are important. We all work too hard not to find enjoyment from life, and retirement should be an exciting part of that. But how do you go from dreaming about it, to actually planning and preparing for it? The answer isn't as complicated as you may think. It's about turning your dream into a goal. Setting the right target. Taking the vision in your mind and examining it in more practical terms. It's about quantification. Let's explore what that looks like.

## Start with What You Know

Your dream retirement is really the sum of several parts. Each one of those components has a value you can assign it. For example, you can very easily quantify how much it costs to take a 7-day vacation to Europe. If you plan on taking several a year, just multiply that number. You know what it costs to play golf or take more yoga classes. You can also figure out how much it costs to downsize and move into a condo or beach house. Each part of your lifestyle is something you can measure, to help create the appropriate framework for targeting your dream. The dream gets turned into numbers; and numbers are essential for planning.

## Look Backwards from the Future

To demonstrate how powerful this can be, ING (now VOYA) performed a study in 2008 titled "ING Retirement Number Study." They also launched a humorous advertising campaign with various people carrying around their "number." The goal of it was "to help simplify the process of retirement planning for Americans by encouraging them to identify and calculate the total amount of money they need to have saved by the time they retire. This retirement dollar amount 'number' is unique to each individual or couple and depends upon their individual retirement goals." Knowing where you are aiming allows you to work backwards to today and setup a roadmap to get there.

## Look Forwards from Today

If retirement seems too far off to you, or is too much of a fantasy, a better frame of reference may be the lifestyle you're living today. While it may not be as charming as the fantasy, it can provide you with helpful values to work with. What do housing, food, clothing, and utilities cost? There are many tangible components of your lifestyle you can measure. Although things may be drastically different at retirement, having a tangible frame of reference to project forward is also helpful.

Whether you're looking backwards or forwards, the critical first step is establishing concrete goals to target. The second step is a bit more complex. Preparing for retirement is all about saving. Month by month the challenge is to try and sock away money into an IRA, 401k, or some other account, all with the express purpose of using those funds when we retire. It's what the financial industry calls "the accumulation phase." It's all about building your nest egg.

Savings consistently must be combined with the right investment strategy to optimize your chances for success. Your investments and their associated risks should align with your retirement goal. Using



online risk assessment tools, in conjunction with seeking professional guidance can help you determine the appropriate investment allocations appropriate. In general, the kinds of risks to consider taking tend to be growth oriented, and perhaps somewhat aggressive. While never comfortable, experiencing a market decline during this stage in your life shouldn't thwart your future plans. You can endure unpredictability because you have a long-term strategy in place. This part of your financial journey is generally categorized by a stay-the-course, weather the storm, be consistent and let things grow attitude.

### **Feeling Behind?**

It's not uncommon to look at your 401k account balance and still feel a bit uneasy about your future. If that's you, you're not alone. According to a 2018 AARP survey, most Americans foresee a retirement savings shortfall. Fifty nine percent said it was only "somewhat likely" or "not at all likely" that their savings and Social Security will be enough to last them throughout their retirement, AARP learned. While things may seem serious, it's not something that can't be improved. No matter your circumstance, there are resources available to help you take simple steps to improve your chances of success. Here are 4 important steps to get yourself on track:

### ***See the Reality of Where You Are***

Check your current 401k plan provider's website for a retirement calculator tool that will help you see where you stand. If one isn't readily available, Fidelity, a leader in 401k plans has a helpful calculator to gauge your retirement readiness. (<https://www.fidelity.com/calculators-tools/fidelity-retirement-score-tool>)

### ***Control the Controllables***

After seeing where you are, start making small but important budgetary steps to increase the amount you put away every month. If this means one less cup of Starbucks, or packing lunches instead of eating out, there are many ways to cut expenses and divert funds more strategically. Triage is key, so be honest about your expenses and what things represents needs versus wants. Mint.com provides a helpful free budget tool to support you in monitoring your budget each month to avoid going over in certain categories.

### ***Maximize your employer options***

Most associations provide their employees several valuable retirement tools. First, make sure you're maximizing all the "free money" that may be available through any matching offered by your retirement plan. If you get the to place where you're maxing out your contributions, inquire with your HR representative to see if the association offers a non-qualified plan (such as a 457b). Those plans may permit you to save more of your income once you've already hit the qualified plan limits. Always squeeze all the juice out of the proverbial orange!

### ***Work with a professional***

There's a lot you can do on your own, but don't downplay the value of working with a financial professional. Making sense of all your options is tricky, and a financial professional can help you see the bigger picture, assess the appropriate options, and provide you with relational support to keep you on track. You may have access to help through your retirement plan provider as well.

By making small practical changes today you can keep your retirement dream alive for tomorrow. 

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# Usability Studies Are the First Step in Understanding How Users Navigate Your Website

By **Marilyn Mages, CAE**

Undertaking a website redesign is something that every organization will experience at some point. So, a few questions that all association staff must ask prior to getting started include: What is going to drive our decisions? And how do these concepts meet user's expectations as well as meet the needs of the current content strategy.



**Sandy Marsico**  
Founder & CEO  
Sandstorm Design

*Sandy Marsico is the founder and CEO of Sandstorm Design, a Chicago-based US, digital and creative agency. From humble beginnings to being featured on CNBC and making Chicago's 101 Best & Brightest Companies to Work For, Marsico has been featured in Fortune, Inc Magazine, The Chicago Tribune, Crain's Chicago Business, NBC, Communication Arts, and The Globe and Mail. She will be a speaker at Holiday Showcase 2019 on December 17.*

Sandy Marsico, founder and CEO, Sandstorm Design, believes that UX design (user experience) starts with understanding a user's motivations and behaviors. To get the needed answers, she encourages her clients to conduct a usability study on their existing site to uncover how things could work more efficiently. The results from this study then move into a more robust site architecture and content discovery process providing insights into functional and content requirements.

"The beauty in starting with the usability study is that there are no wrong answers," says Marsico. "We only need five to six people in a particular user group to identify 80 percent of the usability issues. One study provides us the information we need to understand the thought process, motivations and behaviors of completing a certain task."

She says this because most people will look for things in a similar manner. The usability study starts by asking users to complete a series of tasks. This is not a focus group to get opinions, it is strictly used to see how people find items on the organization's website. For example, participants are asked to:

- Find the latest magazine article
- Join the association
- Register for the annual meeting
- Find a member

Sandstorm asks participants to use a "Think aloud approach", asking them to share aloud their thoughts as they move the mouse and complete the task.


Participants are asked to complete a series of tasks that include, "It's time to renew your dues online. Where would you go?" Or, "Find the latest Journal articles." As they attempt to complete the task, the outcomes drive changes to a web site or web application to make it easier to use.

Marsico has found in more than 3,400 hours of UX research, that people tend to respond the same way. The goal of a usability study is to identify any usability problems, determine what works and what doesn't, and inform design – all while reducing the subjectivity. The process helps discover how users engage and immerse themselves online.

This study also helps find discrepancies in how members and staff refer to programs. Think about it, what does your organization call your member referral program? It could be "Member-Get-A-Member", "Member Ambassador", or even something else. Just as leaders and members bucket information differently, so does staff and members.

"You need to take the user perspective into account to see how they look for information, how they use web applications, and how they bucket the information they are trying to find," she says.

In working with neurosurgeons, for example, Sandstorm discovered that it was important for the content to be the priority, by getting stock imagery out of the way. As well if there was an image, then it needs to have relevance like a CT or MRI scan. On the contrary, commercial realtors wanted a more visual and immersive brand experience.

In the end, starting with how users look for items provides some needed background information when moving to a new site. 

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**Marilyn Mages** is the director of marketing and membership at the American Academy of Implant Dentistry and can be reached at [marilyn@aaid.com](mailto:marilyn@aaid.com).



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# Omaha's **Billion Dollar Baby**



## **More than \$1.3 billion is being dedicated to revitalizing and enhancing Omaha's downtown convention district and airport.**

Within five years, the Omaha airport (OMA) will undergo a \$500 million rebuild which will modernize and reshape how the airport looks and operates. The project is in response to steady passenger growth and airline expansion. The airport surpassed five million passengers last year – a record. Since 2013, airlines have doubled the number of nonstop flights from Omaha to 34. Omaha's airport is a quick four miles to the downtown convention district, which is also experiencing tremendous growth.

A \$300 million riverfront revitalization is currently underway. This transformational 90-acre project includes many "wow" features that will make the area even more attractive for meetings and events throughout the year. Features of the project include a substantial sprawling green space in the middle of downtown with a performance pavilion, botanical gardens, cascading waterfalls, park-side cafés, a sculpture garden, a water cove, urban beach, boardwalk, and a promenade that leads to a cantilever overlook suspended over the river.

This will add to an already robust convention district that includes Omaha's 346,000 square foot convention center with an attached 18,300-seat arena, and more than 3,000 of the city's 15,000 hotel rooms. Two full-service hotel properties are located directly across the

street from the convention center - one connected via glass-enclosed skywalk.

Within blocks of the convention center are two distinctive entertainment districts. The Capitol District, right across the street, provides an outdoor town square surrounded by pubs and restaurants. A few blocks away is Omaha's Old Market Entertainment District, where locally-owned restaurants, pubs and cafés line cobblestone streets. Performances by street musicians and artists add to the fun as you wander in and out of the many boutiques and galleries that make this district one of Omaha's top attractions.

To enhance this area even further, yet another \$500 million project is underway to better connect the Old Market to the Heartland of America Park and lake. A new two-block-long plaza lined with retailers, restaurants, offices and green space is the centerpiece of the first phase of development. Visitors walking along the corridor will be able to shop, eat or relax on a sloping green lawn path that leads to the dock area where they can kayak in the water. A boutique hotel with up to 200 rooms and about 900 new residences are also planned.

Already a vibrant, fresh, new meeting destination, within the next three to five years, the city package is getting even better.

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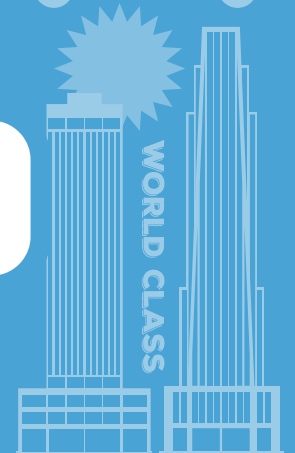
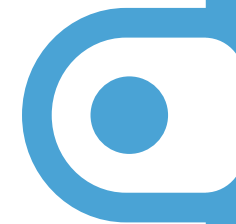
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# Burning Issue:

A Neurosurgeon's Tips for Avoiding Workplace



By **Amy Thomasson**





In a Quantum Workplace survey of the most commonly used words at work, the word busy ranked as lucky number 13. In fact, it ranked higher than innovation, teamwork, or integrity as common descriptors of the workplace experience. Despite an onslaught of productivity apps, life hacks, and project management software, many of us feel, and make sure to tell others, that we are busier than ever. In fact, we wear our busyness and lack of leisure time as a badge of honor, with long hours at the office and constant connection to our email used as a signaling device to show our organizations and coworkers how singularly irreplaceable we are.

While we may receive external validation from projecting our busyness to the world, at what point does that badge of honor become a mark of concern? How do we guard against busyness turning from stress to overwhelm, leading to the dangerous and costly issue of burnout?

A Gallup survey conducted last year of nearly 7,500 full-time employees found that 23% reported feeling burned out at work often or always, with an additional 44% reporting that they sometimes feel burnt out. That means that two-thirds of full-time workers are feeling the burn on a far too regular basis.

The costs of burnout are not only harbored by employees in the form of detrimental impacts to mental and physical health. This burden is also carried in the form of quantifiable costs by employers, as well as the general population in the form of healthcare costs. According to a study called the ‘Employee Engagement Series,’ conducted by Kronos Incorporated and Future Workplace®, 95% of human resource leaders admit employee burnout is sabotaging workplace retention. The Harvard Business Review reports that the psychological and physical problems of burned-out employees cost an estimated \$125 billion to \$190 billion a year in U.S. healthcare spending.

The costs of burnout are far too high, but what can we do about it? As the marketing director of a membership association, I decided to do what I often do when seeking insight, perspective, and thought leadership – seek guidance from an expert member. Luckily, since I work for the Congress of Neurological Surgeons,

I didn’t have to go far to find an expert in burnout, stress, and their effects on the mind and body. Doctor Renée Reynolds is an Assistant Professor of Neurosurgery at State University of New York at Buffalo and Medical Director of Pediatric Neurosurgical Outreach and Education at Kaleida Health. She recently published an article on burnout in neurosurgery residents and now shares her insight on how the general working population can better understand and be vigilant in guarding against burnout.

## Understanding the Difference Between Stress and Burnout

“Stress and burnout are conditions that fall on a spectrum, but the line in which one ends and the other begins is blurred. Stress is the body’s reaction to physical, mental, or emotional changes that produce a need for response. Stress can be both positive and negative, with positive or healthy forms of stress initiating our bodies to respond by being more alert, motivated, and prepared to form the necessary response.

Stress can become negative when it is overwhelming, continuous, and difficult to formulate a successful response to. Burnout, however, is always negative and while stress is not a disorder, burnout is. With stress people are often still interested in exerting effort to remedy the situation and often have reduced levels of stress with time away from the stressor. Burnout is an extension of stress where the individual’s coping mechanisms have been depleted leading to



emotional exhaustion, depersonalization, and diminished personal accomplishment. Instead of responding with more effort and emotional commitment, an individual has little or no energy to address the stress, and their emotions become flattened to it. An additional key feature of burnout is that recovery time away does not produce a sense of rejuvenation upon return.”

## Applying Lessons from Medical Resident Burnout to the Office Environment

“Through my research, I have learned many things that are applicable to the general working population. The first lesson is that contrary to what many people may think, burnout is not a condition of the weak or indolent. It is those who are most engaged, dedicated, and hard-working that are most at risk. It is also this same population that has more difficulty recognizing burnout in themselves. Anyone is at risk developing burnout, and the general working population and workplace environment face the same challenges identified in medicine regarding the lack of education, recognition, and ability to address burnout.

The second important lesson relates to personality types that lend themselves more to experiencing burnout. As mentioned earlier, although everyone can feel the pain of burnout, Type A personalities, perfectionists, and workaholic mentalities are most at risk. These are typically individuals who work in stressful environments that are either chronically frustrating due to the lack of power to change the environment or to have control over challenging situations. This, however, does not preclude other personality types from developing burnout, and we should be on guard for burnout in all employees.”

## Steps to Guard Against Workplace Burnout

“The first step is recognition. Professionals should be educated about burnout and the potential signs and symptoms, as well as the negative effects it can have on their professional

and personal lives. Ideally, this education would come from the employer, but if not, individuals should take the initiative to educate themselves to protect their health and wellbeing. Major warning signs of burnout include low energy, disengagement, frequent sickness, lack of relaxation, and reduced coping ability.

The second step is to develop resiliency techniques to combat burnout. These techniques are varied and each individual may respond differently to each technique. Some revolve around physical fitness and wellness, others focus on fostering personal relationships, while yet others focus on open discussion of feelings in a constructive fashion.

It is acknowledged that the factors contributing to burnout may not have perfect solutions, however, small changes can have major impacts. As an example, within the medical arena one of the most common complaints is a lack of time to devote to personal interests, relationships, and wellbeing. One small solution is to make an internal agreement to avoid checking email and turning off audible alerts and trivial devices at the end of the day to protect what time is available for the things that you value for your personal wellbeing. Often, even the sound of the receipt of an email on one’s device increases internal stress by subliminally feeling the need to respond and address. Additionally, it further depletes the limited time available to rejuvenate yourself. Engaging leadership to prioritize these changes further supports the initiatives to combat burnout and is paramount to the success of these strategies.”

While looming deadlines and near-constant connectedness has tightened the vise grip of pressure many of us are feeling at the workplace, it is possible to recognize the symptoms of burnout, develop tactics for mitigating personal risk, and communicating openly about stress and burnout with others. Through mindfulness and organizational support, you can abate the indicators of burnout before they become a dangerous blaze. ☒

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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).





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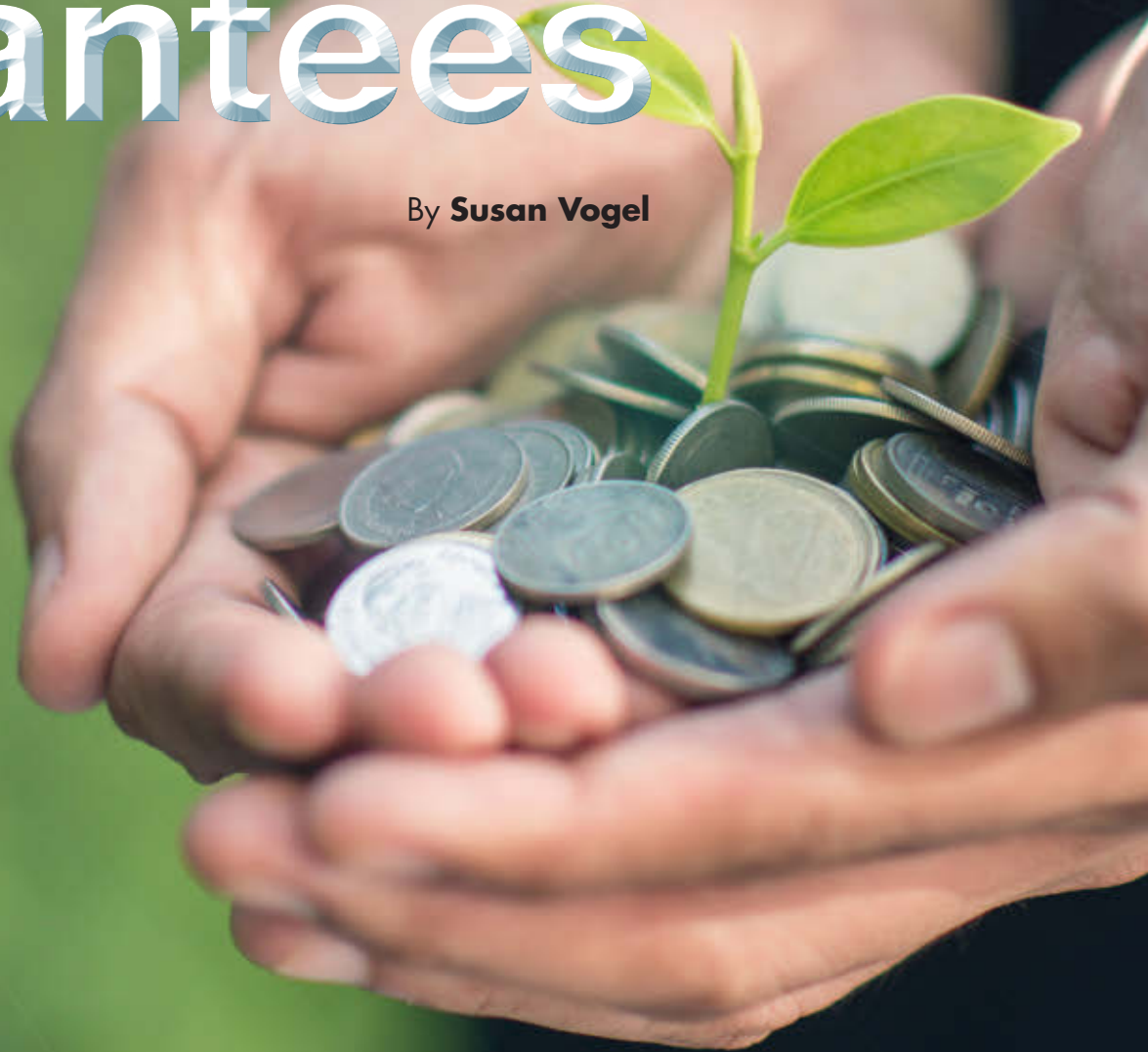
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# Professional Associations make great Grantees

By **Susan Vogel**







Grant funding can be a viable, non-dues revenue source for many professional associations. However, the idea of “grant funding” often evokes one of two fantasies: the first is that there is an unlimited flow of funding just waiting for the asking, while the second is that foundations don’t provide grants to professional associations.

While funding opportunities are not exactly infinite, associations make worthy grantees because:

1. Their members are the experts in their respective field
2. They are conveners and foster collaboration across the professional community
3. They have an expansive extended reach throughout the professional community
4. They are the hub where research and policy meet practice.

Increasingly, grant funders are looking for projects that include a high level of collaboration as many of the issues addressed by funders and associations today are highly complex and require partnership as a solution. While there are individual authorities outside of the professional community, associations are unique in their ability to convene subject matter experts and foster collaboration across sectors. By the nature of their business, associations also have extended reach because they are tapped into industry leaders, suppliers and vendors, practitioners, and recipients of services. They have the capacity to quickly mobilize industry professionals and other individuals who are invested in a given issue. Additionally, because associations often are at the center of where policy meets practice, they can carry out projects that have a demonstrable positive impact on social issues that align with current national and local policies. For grantors funding these initiatives, this ability to collaborate and organize key stakeholders makes associations strong candidates for grant funding.

## Developing a Competitive Proposal

A quick overview of common proposal elements includes a description of the association and its

mission, board of directors, history, and major accomplishments. Funders will require detailed financial records including a recent financial audit, organization and project budgets, and a long-term sustainability plan for the project.

In building a case for support, grantors will require a need statement which sets up a logical argument that demonstrates a social need and how the proposed project fulfills that need. The need statement also allows your association to establish its level of expertise on the issue.

Most grantors will require a project overview with a detailed implementation plan, timeline, and concrete deliverables. This should address the nuts and bolts of the project and the operational capacity of the association to carry it out. All grantors will require some level of reporting and metrics to demonstrate success of the project. A high-quality proposal will clearly articulate the evaluation metrics that accurately align with the proposed deliverables.

## Leveraging Assets: Case Studies

AMC has a centralized grants management department that works with its clients to develop proposals and manage the grant life cycle. Below are a few case studies that demonstrate how associations make great grantees and how grant funding can be part of a non-dues revenue stream. These case studies highlight the associations’ ability to convene experts and foster communication, extended reach, and their ability to move policy into practice to garner funding.

## Convening Experts and Fostering Collaboration

One example of how these attributes benefited a professional association is recent work



“For grantors funding these initiatives, this ability to collaborate and organize key stakeholders makes associations strong candidates for grant funding.”

conducted by the American Academy of Hospice and Palliative Medicine (AAHPM), which received more than \$7 million in grants in 2018. AAHPM, in conjunction with the National Coalition of Hospice and Palliative Care and the RAND Corporation, was awarded a \$5.5 million federal grant from the Centers for Medicare & Medicaid Services to develop two patient-reported outcome performance measures for palliative care. *(Note: The project described was supported by Funding Opportunity Number CMS-1V118-002 from the U.S. Department of Health & Human Services, Centers for Medicare and Services. The contents provided are solely the responsibility of the authors and do not necessarily represent the official views of HHS or any of its agencies.)*

Together with the Center to Advance Palliative Care, the Global Palliative Care Quality Alliance, and the National Palliative Care Research Center and the Palliative Care Quality Network, AAHPM also received a \$2.4 million grant from the Gordon and Betty Moore Foundation to create a unified quality improvement organization and data registry for palliative care. AAHPM was an attractive and competitive candidate for this funding because of its ability to foster collaboration and its national reach across settings and practitioners. Both projects also directly relate to current national policies on health care, which made the timing of the grant very appropriate.

#### Extended Reach

Grants do not need to be measured in the millions to have an impact on an association and its members. Highlighting the themes of expertise and extended reach, the American Association of Neuroscience Nurses (AANN) received a \$15,000 grant from the Paralyzed Veterans Association (PVA) to provide clinical education on spinal cord injuries to neuroscience nurses. In this case, both groups shared the goal of improving care for individuals with spinal cord injury and AANN had the expertise to develop

and implement the educational symposium. Importantly, too, AANN has the national reach to neuroscience nurses across the country, making an impact on a larger scale that includes nurses who provide care to veterans—part of the PVA's mission.

#### Policy Meets Practice


In some cases, an association can lead the way in raising awareness for a key policy initiative, which can result in grant funding to advance the effort. For example, the American Academy of Home Care Medicine (AAHCM) has made tremendous impact in addressing the needs of its membership through public policy. AAHCM's efforts have contributed to the Centers for Medicare and Medicaid Services (CMS) policy changes that led to improved access to home based primary care (HBPC) for individuals with serious illness and disability. Because of its capacity to move this policy into practice, AAHCM was awarded a generous grant from the John A. Hartford Foundation to implement an integrated campaign that raises payer awareness of home-based primary care as a cost-effective, patient-centered medical care solution.

The grant enabled AAHCM to develop a web toolkit with a white paper, create strategic social media and e-mail campaigns, develop a video testimonial and infographic, and craft press releases and advertisements. AAHCM saw significant results from its outreach efforts: the web toolkit received more than 2,000-page views (61% of which were not part of AAHCM's current audience); the white paper was downloaded more than 900 times; the press releases were picked up by 183 outlets; and the marketing campaigns reached director and C-suite level medical professionals.



## Grants as a Non-Dues Revenue Source

There is valid reason for every association to evaluate whether grant funding can be a reasonable source of non-dues revenue. AMC is pleased to provide services to our clients that help them leverage their assets and create high-quality proposals, effectively manage the life-cycle of the grant, and ultimately demonstrate that professional associations make ideal grantees. It's important to keep in mind that the grant pro-

cess is competitive, but attainable. With rigor, patience and attention to detail, it can become a viable option to advance your organization's mission and increase your capabilities to serve your members. 

Grants management professional **Susan Vogel** was instrumental in working with AMC to institute a centralized grants management department. This department serves all AMC clients and provides support for medical education, corporate, foundation and government grants.



## Wondering Where to Start? Assess Your Readiness

Knowing that the grant process takes time and is highly competitive, engaging in a grant readiness assessment is fundamental to successful proposal development. Here are some ideas to keep in mind when deciding if your organization is ready to apply for a grant.

- 1. Know your strategic plan.** Every single proposal idea should start with the question "does this project align with our association's strategic plan?" It's a yes or no answer. If the answer is no, then that is probably a strong signal to change the project or your strategic plan. While at this point in the process the question is more of an academic one, it will become increasingly relevant to have a solid understanding and consensus on how the proposed project aligns with your association's strategic plan. Organizations that fail to do this at the beginning meet challenges further down the proposal development process and, if funded, even more challenges in carrying out the project. The lack of alignment with the strategic plan usually manifests in insufficient resources and sometimes even leads to financial losses in carrying out the project. When reviewing grant proposals, funders look for projects that convey a well-conceived business perspective and are feasibly sound in that the organization has the capacity to carry the project within their strategic plan.
- 2. Know your status.** Some funders will not provide funding to nonprofits with a 501(c)6 tax exempt status. As an alternative, organizations that have a foundation with a 501(c)3 status can apply through the foundation. A consultation with a nonprofit accountant or auditor can provide guidance on proper financial accounting for this type of transaction. If the project entails a collaboration with an organization with a 501(c)3 status, the 501(c)3 organization can submit the grant and list the association as a sub-grantee or contractor. Most grantors will accept this arrangement if a documented memorandum of understanding (MOU) is included in the project implementation.
- 3. Know your team.** Developing a grant proposal and carrying out a grant funded project is a highly collaborative activity. Identifying the team and assigning roles and responsibilities early on will set up the project for success and will position it as achievable and well thought out. A good team includes thought leaders and advisors, staff who will carry out the project, finance managers, and sometimes beneficiaries of the project.



# The Connectors of the Community:

## Don Welsh on How CVBs Are Evolving To Stay Relevant


By Dan Shea

**Don Welsh**  
*President & CEO*  
Destinations  
International



Don Welsh is the president and CEO of Destinations International. Prior to joining the organization, he served as president and CEO of Choose Chicago, where he and his team reported record-breaking results in number of visitors, tourism spending, hotel tax revenue and jobs. Previously, Welsh held the CEO position at the Indianapolis Convention & Visitors Association and the Seattle Convention & Visitors Bureau. In addition, he held senior leadership positions at Westin Hotels, the Ritz-Carlton Hotel Company and the MGM Grand Hotel/Casino in Las Vegas.





It's a precarious time for destination organizations/convention and visitor bureaus (CVBs). From coast-to-coast and across the seas, governments and watchdog groups are keeping a close eye on any budgets that involve revenues from taxpayers. This increased scrutiny which had led to some highly-publicized questioning of CVB's uses of resources. Don Welsh, president and CEO of Destinations International, wants CVBs to take on these challenges by demonstrating and communicating the value that they bring to their cities or states, from tax-generating tourist spending to jobs created by the meetings industry. FORUM spoke with Welsh about the evolving CVB industry, and the advocacy work and research initiatives that Destinations International is doing to secure and elevate the future of CVBs.

**FORUM:** Tell me about the value that CVBs bring to their destinations?

Destination organizations have multiple responsibilities, and over the last few years those responsibilities have widened in scope. In many places, where cities or states don't necessarily have marketing departments, CVBs become the creator and the steward of the brand, as well as the conduit for anything that is tourism-related for their destination. They become the single source of knowledge and connectivity for potential visitors, whether they're coming in for a convention or for leisure, and they become this great repository for data and information for visitors.

**FORUM:** In terms of the widening scope of responsibilities, what else have CVBs taken on in recent years?

In this era of having large amounts of data, cities in particular are always looking at where their revenues are coming in from, whether it's on a weekly or monthly basis. I saw that starting around 8-10 years ago, cities were becoming much more aware of the impact that tourism organizations have in terms of visitors coming in

to the city—which leads to taxes, revenues and jobs. Those are some of the common metrics you look for in destinations and I don't think they had been as visible as they've become in the last decade or so. I think many destination CEOs have become very conversant at dealing with local government and interacting with mayors and council members to make sure that their message and the importance of what they do can be translated to that level.

**FORUM:** In the last few years, has it become easier or more difficult for CVBs to make their case for funding?

I think it's become exponentially harder. Case in point would be when the new mayor was elected in New Orleans. Even though 65% of New Orleans' GDP is tied to tourism and meetings, one of the mayor's first efforts was to redirect money that was dedicated for tourism efforts over to city services—I'm not talking about police and fire, I'm talking about basically water treatment plants. There are at least ten cities I think of that are facing these constant challenges.

I'll use Austin, Texas as an example. It's one of the fastest-growing destinations in the country. For the past three years, (Austin Convention and Visitors Bureau president and CEO) Tom Noonan and his team have had to continually





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“We’re helping destinations change the way they’re messaging, not only to the external customer or the the meeting planner, but also how they are talking about their value proposition to the local community.”

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fight for dedicated funds that were earmarked for his organization. They were being supported by a very non-centric group of city council members who really weren’t able to make the point of the continued investment specifically for tourism. They wanted to redirect some of those funds as well.

That’s why I think the work that Destinations International is doing in the area of advocacy and research is so critical, because there is also a shift in the way destinations are having to speak to their elected leaders. That’s one of the biggest undertakings within the work that (Destinations International chief advocacy officer) Jack Johnson and our advocacy teams are doing. We’re helping destinations change the way they’re messaging, not only to the external customer or the the meeting planner, but also how they are talking about their value proposition to the local community.

When I was in Chicago, I’d sit down with Mayor Emmanuel and we’d talk about a convention was worth \$50 million or \$100 million and X number of jobs. I think for the most part, there’s a certain expectation that elected leaders place on a destination organization. It was important to have the involvement of the civic leaders as well. I was hired by (former chair of the Choose Chicago board of directors) Bruce Rauner, who was at the time the chair of GCR Capital. It was important to have people like him, Jerry Reinsdorf, Tom Ricketts and major restaurant owners understanding our business. All the key players who needed to be at the table were there. In a simplistic way, I think that when you see everyone rowing in the right direction and you understand the responsibilities you have when you represent a city and bear the name of that city, there are responsibilities that the CEO has to understand to go along with that turf.

But at the end of the day, I think there needs to be a pivotal change in how that destination organization is going to become a community good and how it’s going to tie in the relevance and significance of what they do for the overall community. There has to be that community value that not only people in the industry see but is also communicated to the local citizens. So, when they see that there’s a group in town and they can’t get into their favorite restaurant, they’ll understand that’s not by coincidence. Rather, there’s an organization responsible for helping the community in terms of its

economy, its vibrancy and the ideals that it stands for. It has become much more complex over the last few years.

### **FORUM:** What sort of research is DI engaging in to support your members and the destination management industry?

Over the last few years, we realized that we live in a global community, which led to us to change from Destination Marketing Association International (DMAI) to Destinations International. We clearly laid out a mission and a value proposition that became very member-centric. The bottom line is that there is no need for this organization if our members aren’t successful. Then, we laid out four very distinct pillars, which are community, advocacy, research and education. Each of those have very detailed strategic plans and action items of that are all there for the benefit of one thing—helping our destination partners and members be the best they can be for their respective communities.

We achieve that goal through our discipline-focused summits. We have our Annual Convention—this year’s convention was hosted in St. Louis and had more than 1,525 people. We also have our education programs, our Certified Destination Management Executive (CDME) certification, and a host of additional services. A lot of it is being done through research that is based on what our members want and need. We have a very experienced research leader in (Destination International’s senior director of research and advocacy) Andreas Weisenborn, who has brought a high level of skills and experience to lead that department.

### **FORUM:** How can associations be partners and supporters of destination organizations?

Part of the responsibility has been for Destinations International and the individual destinations to continue to evolve and talk about the relevancy of the services they provide for the meeting planner. That is a constant evolution and that




is a major focus we have right now. We've now developed great partnerships, including, in no particular order, with Association Forum, PCMA, MPI, IAEE, ASAE and others. Destinations have had to go back and figure out new and creative ways to earn the right to host a meeting—from getting the lead to the site inspection—but it's no longer just about heads in beds. The responsibility now is that when you got a shot at a meeting, you need to activate your entire community. You need to make certain that you align with the objectives they have in the meeting.

I've always been a staunch believer that no one has a better understanding of their city than the destination organization. They are the thought leaders. They are the connectors in the community that bring together speakers who may be relevant for that meeting. They are the source of knowledge when it comes to the existing the product, as well as what's in the pipeline, because that's their job. No hotel sales organization can do that. No third party can do that.

There is this great collaborative effort taking place right now, and I have to give our friends at MPI the shout-out for being the first of the major association partners to launch a comprehensive media campaign to talk about the value proposition of destinations for meeting planners. We can continue to do our work to talk to the planners about the value we provide, and that's great, but when you get the industry associations of which the planners are members involved, that's where I think this great synergy is happening.

## **FORUM:** How do you see CVBs and the industry evolving over the next decade?

I think this applies to any organization, and that is relevance. I think that number one, CVBs and destination organizations are going to have to continue to evolve. They're going to have to continue to look at emerging technologies and look at what differentiates their community from others potentially in their competitive set. I think they have to have an alignment of products and services that are wanted, whether by a leisure tourist or by a meeting planner. I think technology will always play a critical role, but the real point of difference is that connectivity that the CVB needs to employ when they have an opportunity to the case for why their city should host a meeting versus someone else. There's no resting on any laurels or resting on any systems. There's got to be a constant re-evaluation of how you do business and assessing whether you are staying relevant and worthy of business, as well as funding. 

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# What CEOs Need to Understand About Their Technology Executives

By **Heidi Weber, MBA, CAE**

With contributions from **Bill Bruce, MBA, CAE,**

**James D. Gibson, PMP**

and **Katherine Matthews, CAE**

**T**

he bridge between what a CEO expects from an association's technology chief, department and partners may be wide and confusing. With digital transformation pushing organizations to analyze their technology platforms, it is crucial that CEOs learn to collaborate with not only their technology executives, but also the strategic partners who help provide member value.

FORUM asked four association professionals to share insights about how to leverage the CEO-Technology Executive-Partner relationship in order to propel the organization forward.





**Bill Bruce, MBA, CAE**  
*Chief Executive Officer*  
American College of Occupational & Environmental Medicine

Bill Bruce, MBA, CAE is responsible for the overall operations of ACOEM's headquarters. He works closely with the ACOEM president, board and staff to ensure that ACOEM is true to its mission, vision and strategic inventory. Bruce has nearly two decades of experience in executive roles for medical societies. He earned his MBA from the Robert H. Smith School of Business at the University of Maryland and is also an ASAE Certified Association Executive. He can be reached at [bill@acoem.org](mailto:bill@acoem.org).

After a decade and a half leading technology for two major medical societies, I can speak from experience on many issues facing senior IT leaders when it comes to supporting their organizations, their CEOs and their boards. Now, as a CEO, I can offer this advice to peers.

**Nobody ever joined a society because they have great technology.**

CIOs and CTOs may have a difficult time accepting this. So might other executives who are enamored by the promise of technology. The fact is that for most organizations, technology is not the "closer" that we all want it to be. BUT lousy technology can be a significant factor in limiting member value delivery. Forcing members to interact with your organization via inferior technology can be a driver of poor member retention and is a driver of poor member experience. IT leaders may themselves miss the difference here and oversell the upside of IT investments. Today, the value of IT is in fortifying value delivery and preventing downside effects.

**Your IT team might harbor stronger business talent that you or others assume.**

If your organization has a moderately mature and sophisticated IT ecosystem, the chances are that you have IT staff who can hold their own with a line of business pros in other areas of the organization. If IT staff have done their job, then they had to understand many aspects of the business to get your IT systems up and running. They may be a good source of creative ideas on business

process improvements and can likely challenge the status quo for business units they support, which may be getting stale. Successful IT teams know how to partner with other business units and tend to take on more understanding of the work done by those non-IT teams than they get credit.

**Good technology executives know how to communicate without depending on jargon, buzzwords or other crutches.**

This is because good IT executives see themselves as part of the business leadership team. Like a good CFO or COO, an IT executive should be able to meet on the same level as any of their peers. They should earn the trust and respect of others through their ability to partner on shared objectives. CEOs should be willing to enable their technology executives by granting them parity at the executive table. IT executives are the ones who should be planning the roadways between your business units and members and need access and accountability to do that well.

IT can't be relegated to simple operational support any longer. The fact is that this has not been the case for many years. IT is not and should not be viewed as a silver bullet. Good IT is not just a cost center—Good IT is an investment in value enablement.

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**"Good IT is not just a cost center—Good IT is an investment in value enablement."**

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**James D. Gibson, PMP**

*Strategic Consultant, Technology Management*  
DelCor

With 16 years of experience in the association community and more than 30 years as a senior IT executive and consultant, Gibson has a history of effective leadership, strategic expertise, issue resolution and team building. He is an experienced speaker and an active member of the association community. He is a member of the Association Forum, where he is a recent past chair of the Information Technology Shared Interest Group, serves on the SmartTech Conference Planning Committee and was the 2019 John C. Thiel Distinguished Service Award winner. Gibson is also a member of the American Society of Association Executives (ASAE) where he currently serves on the Diversity & Inclusion Committee. Prior to joining DelCor's Chicago office in 2017, Gibson served as the IT Director for the American Hospital Association (AHA) for over twelve years, where he led the overall strategic direction for IT Business Applications. He can be reached at [JGibson@delcor.com](mailto:JGibson@delcor.com).

It is imperative that the CEO sees the CIO as a strategic partner that will help the organization achieve its business objectives. In turn, a CIO will need to think strategically and work with the executive team to influence and guide staff on using technology to transform the organization. A CEO should expect their CIO to have a firm understanding of their business and how their IT systems can enable the desired business outcomes. As CIOs become more involved in business outcomes, they need to be able to communicate effectively and regularly with their CEO.

How do organizations fare when it comes to making sure IT is aligned with the business goals? In a recent survey of 500 IT professionals conducted by INAP, they found that 27% strongly agree that their senior management has "clearly communicated a desire to see the IT team be more aligned with the goals of individual business units." What's more, 57% of IT professionals feel they're only contacted when something goes wrong. At the same time, a vast majority believe IT should be at the forefront of digital transformation initiatives and that they could bring even more value to their organizations, if only they had the resources and authority.

To achieve meaningful alignment, business units must understand how IT can be partners in their success. Success can occur in many ways, including empowering efficiency and agility through new application and infrastructure platforms, creating business opportunities through and data management and tools, and safeguarding critical business assets from internal and external threats. CIOs have a responsibility to drive awareness of the capabilities of IT and how those capabilities can unlock new opportunities. Conversely, CEOs, and Executive Leadership must be willing to expand their knowledge of IT and technology to make informed decisions and drive innovation. The CEO would still rely on a CIO for in-depth technical knowledge but having a greater understanding of critical areas of IT such as security, data analytics, and disaster recovery basics would be beneficial.

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**"CIOs have a responsibility to drive awareness of the capabilities of IT and how those capabilities can unlock new opportunities."**

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"IT is not a blocker for your initiative. We are all working towards our organization's shared goals, and no team wants to be in another's way."



**Katherine Matthews, CAE**  
*Manager, Data & Analytics*  
National Council of Architectural  
Registration Boards

#### **Everything is connected.**

We're all under pressure to deliver value to our organizations. But, in the push to create and execute deliverables, we often overlook the intricacies and interdependencies of our projects. One of my least favorite reasons to be added to a meeting is as the person who must break the news that such-and-such can't be done until we finish blah-blah-blah. Keeping our data "house" in order is critical to being able to launch and support our initiatives seamlessly. How do we do this? By consistently and iteratively evaluating our systems and their data in the context of our organization. The more we are familiar with what's expected and what's not, what's familiar and what's a new trend, what's working and what's suspicious, the better equipped we are for these projects that will rely on this complex and interrelated data as a foundation. Conversely, the more we start projects and must shelve them because the data isn't matched or complete, the more time and trust we lose.

#### **If it isn't connected, it should be!**

Separate systems are not an excuse for disparate data. We've been talking for many years now about making the shift from using the AMS for everything to using the right system for the right task. But, often, along the way, we've compromised data integrity and/or accessibility for functionality and user experience. It doesn't have to be that way! With forethought and intentionality, we can craft our systems to use a common vocabulary and can lever-

age identity management services that unify records across the different portals. And if you've already got an ecosystem of "best of breed" tools in place, you can still work with some of the new tools that are out there for after-the-fact record matching as you prepare the data for use in reports or entry into a data mart/warehouse/lake/aquifer. (I made that last one up – don't worry.)

#### **IT doesn't own the data.**

Who does own the data? The individual subject matter experts for the program area(s). Your IT department should be the authority on best practices and the go-to for all things "under the hood", but the people closest to the members/customer/users should be the ones in the driver's seat when it comes to maintaining, evaluating and interpreting the data. This division of responsibilities ensures two critical things:

- 1) IT is not a blocker for your initiative. We are all working towards our organization's shared goals, and no team wants to be in another's way.
- 2) When change inevitably is needed, everyone has confidence in the supporting data. If consulting the data is something that happens only infrequently and begrudgingly, then there will always be challenges with building trust. But, if we make seeing and working with the data a part of our day-to-day, then we will have a shared understanding as a foundation for conversations around change.

Katherine Matthews is the manager, data & analytics for the National Council of Architectural Registration Boards and a passionate data evangelist. In her work for NCARB, she helps teams across the organization find and leverage insights in their data while encouraging a self-service approach to analytics. In her "spare" time, Matthews enthusiastically shares her experiences and helps to organize meetups for the data curious in the association community. She is currently serving as vice-chair on ASAE's Technology Professionals Advisory Council and as a board member for the Association Women Technology Champions group. She can be reached at [kmatthews@ncarb.org](mailto:kmatthews@ncarb.org).





## Digital Extra

To access Heidi's October 2018 FORUM article, *"The Impact of Digital Transformation: It's Still a Thing,"* visit the digital or mobile versions of FORUM.



### Heidi Weber, MBA, CAE

Executive Director

Alpha Omega International Dental Fraternity

Heidi Weber, MBA, CAE, is the leader and facilitator of the Alpha Omega International Dental Fraternity (AO) located in Rockville, Maryland. As the executive director, she has been a change agent and has championed mission-driven programs to benefit the healthcare community. With more than 15 years of experience in nonprofit and corporate organizations, Heidi has provided leadership and strategic management to both professional and trade societies and their members and boards. She is a member of the ASAE Technology Council. You can contact Heidi at [hweber@ao.org](mailto:hweber@ao.org).

Speaking with a small staff association voice, I execute operations with a minimal technology budget with high aspirations. In the October 2018 FORUM article, *The Impact of Digital Transformation: It's Still a Thing*, I discussed how technology is often viewed as a luxury for small associations. My organization does not have a technology department, and over my eight-year tenure, I have successfully woven a patchwork of dedicated partners who assist with the technology operations.

#### For Small Staff Associations, CEO is the New CIO

Technology rests on the shoulders of the executive because there is no other business unit to assist with assessing IT maturity or sourcing. Executives rely on technology partners and consultants to guide them through difficult decisions, like selecting a new AMS, refreshing a website, or streamlining content from different systems. Having an attitude that technology is an organizational driver and not a passenger allows the executive to excel as a CIO but execute as a CEO.

#### Build a Technology Network


It is incumbent for a small staff association executive to develop a keen sense of foresight as to what the organization needs now and in the future. Building a technology network involves

engagement—with technology professionals, attending technology-focused meetings (like the Association Forum's SmartTech Conference), and posting questions on the Association Forum's MyForum area.

#### Planning and More Planning: Foresight, Strategic, Succession, and Transition

In the association community, four types of planning are hot topics that should occupy space in executives' minds. Don't be scared that planning must happen all at once. Whether it is foresight, strategic, succession or transition planning (or a combination), technology should be a primary driver in the discussion, drafting, and execution. Involve the board or a special committee to intentionally share the responsibility to budget for future technological needs.

#### Technology Partners: Be a Friend

Many small staff associations have limited budgets but big needs. Some technology partners only engage with associations over a revenue threshold, which inherently may leave some associations not able to participate. I hope that technology partners, even if they cannot work with an association, shares their wisdom when an executive reaches out. Sharing technology information, collaborating, and engaging benefits the association community at large. 

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*"Sharing technology information, collaborating, and engaging benefits the association community at large."*

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Advance and On-site Registration services, Internal Housing Reservation Systems and full-service Housing Management, Mobile Apps, Exhibitor and Floor Plan Management, Banquet Manager, Call for Papers, Conference and Speaker Management, Meeting Logistics Manager, Lead Retrieval, Session Tracking and RFID Services are just the beginning of the services you will find “Under The eShow Umbrella.”

Our On-site Services can travel all over the world with you. Asia, Europe, North and South America are all on our destination lists. Included with the International Services are international currency processing and language translations.

Our services also provide Integrations and APIs with all the major Association Management Systems and CRMs.

With each product being its own stand-alone module, we provide our Clients to opportunity to select by their specific event needs. However, combining modules offers a full integrated internal system where you no longer have to worry about moving data from one product to another.





## August 2019

**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.

**SEPT  
11**

### CAE Study Group - Suburban

Held weekly on Wednesday evenings  
from 5:30 – 8 p.m.  
1061 American Lane, Schaumburg, IL,  
60173-4973

*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.*

**NOV  
20**

**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  
17**

### Going Global Summit - Chicago

3 – 5:30 p.m.

*Join us for the 2nd Annual Going Global Summit to learn from association CEOs about the key to success when entering or growing into the global space. This program is limited to association professionals only.*

**SEPT  
18**

### Going Global Summit - Rosemont

3 – 5:30 p.m.

*OLC Education and Conference Center, 9400 W. Higgins Road, Suite 100, Rosemont IL  
Join us for the 2nd Annual Going Global Summit to learn from association CEOs about the key to success when entering or growing into the global space. This program is limited to association professionals only.*

## September 2019

**SEPT  
4**

### Welcoming Environment Conversation Circle: White Men and Diversity – An Oxymoron?

9 – 10:30 a.m.

*This session is open to all who support and encourage those who self-identify as being from a majority or privileged position—who are committed to creating, leading and sustaining a more inclusive workplace and association culture.*

**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.*

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

### Calendar Legend

● Education Events ● Shared Interest Group Events ● Webinars

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





## November 2019

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.

NOV  
7

### #2'S/COO'S SIG

9 a.m. – 10:30 a.m.  
*Bring a Guest! We know one is a lonely number. That's why we invite you to bring a guest to a Shared Interest Group meeting. Not a member? No problem. Non-members can attend one complimentary event before becoming a member of Association Forum. Join others with shared interests and discuss issues, ideas and trends. All guests must pre-register themselves!*

NOV  
7

### Webinar: Is it Time To Recession Proof Your Association's Investments?

11 a.m. – 12 p.m.  
*This session will help association staff in all disciplines understand the potential impact of the next recession and ways management and volunteer leadership can prepare your association's investments. Drawing upon an important industry research this webinar will provide important historical perspective and practical, actionable steps association staff and volunteer leadership take now.*

NOV  
20

### Finance + HR Symposium

9 a.m. – 4 p.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

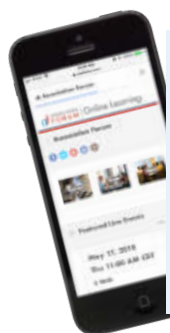
### Joint Governance/Membership SIG

9:00 a.m. – 10:30 a.m.

OCT  
30

### Leveraging Emotional Intelligence to Up Your Leadership Game

9 a.m. – 12 p.m.



## Online Learning!

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

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

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

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

### Calendar Legend

● Education Events

● Shared Interest Group Events

● Webinars

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



## Promotions and Changes



**Bruce MacMillan** will join the Professional Convention Managers Association (PCMA) as chief marketing officer, effective September 2. Macmillan is currently the CEO of Visit DFW and runs BANDWIDTH consultancy. He was previously the CEO of Meeting Professionals International (MPI) and Tourism Toronto. MacMillan developed and led Vancouver, B.C.'s successful national bid for the 2010 Olympic Winter Games.



PCMA has promoted **Michelle Crowley** to the newly created position of chief growth & innovation officer. Crowley joined PCMA a decade ago, and has served in a variety of roles, most recently as the organization's vice president of global growth and business transformation. She was a recipient of the Smart Women in Meetings Award from Smart Meetings in 2019.



**Sabrina Adams** has joined Association Forum as membership coordinator.

Adams is a recent graduate of Loyola University Chicago where she earned a BBA in marketing and a BA in Political Science. She previously interned for Wisconsin Senator Tammy Baldwin in Milwaukee and in Washington, D.C.



**Steve Smith**, CAE will become CEO of Association Management Center (AMC),

effective April 1, 2020. Smith is currently the vice president of client relations at AMC and CEO of the American Academy of Hospice and Palliative Medicine (AAHPM). Prior to joining AMC in 2007 as an account executive, he was senior director of business development & member services at the American Academy of Physical Medicine & Rehabilitation. AMC's current CEO, **Scott Engle**, will assume a new role as chair of AMC's board of directors.



Visit Indy has hired **Janelle Johnson** as convention services manager. Johnson

joins the organization from Ashfield Meetings & Events, where she was senior project manager. Previously, she held positions at Indiana Black Expo and Radio One. Johnson is an Indianapolis native and received her B.A. in Communication and Media Studies from Indiana University-Purdue University Indianapolis.



**Andrew Mallon** has been named executive director of the Indiana Convention

Center & Lucas Oil Stadium. Mallon most recently served as corporation counsel for the City of Indianapolis, supervising all legal representation and counsel, most notably the planning, design, financing and procurement of the \$600 million Community Justice Campus project. He replaces long-time executive director

**Barney Levensgood**, who held the position since 1991.



**Dustin Arnheim** has joined Visit Baltimore as vice president of convention

sales and services. Previously, Arnheim had been with Visit Indy for more than a decade, most recently serving as senior director of sales. Prior to his time at Visit Indy, he worked for Hyatt Hotels, as associate director of sales for the Hyatt Regency Indianapolis and as a sales manager at the Hyatt Regency McCormick. Arnheim was a 2016 recipient of Connect Corporate's 40 Under 40 award.

## News and Awards



**Stephanie Moritz**, chief communications officer at the American Dental

Association, has been named one of PR News' Top Women in Healthcare. Prior to joining ADA in 2015, Moritz led social media strategy, content marketing, public relations, consumer research and real-time marketing efforts for global brands such as ConAgra Foods, The Hershey Company and Jim Beam Brands. She has previously been named on of PR News' Top Women in PR, as well as Marketing Executive of the Year and Female Professional of the Year by the Golden Bridge Awards.



Congratulations to the following organizations on being named Power of A Summit Award winners:

**American Geophysical Union**  
Washington, DC  
Program: Thriving Earth Exchange

**American Society of Hematology**  
Washington, DC  
Program: ASH Sickle Cell Disease Initiative

**Georgia Association of Convenience Stores**  
Dallas, GA  
Program: Convenience Stores Against Trafficking

**IEEE Power Electronics Society**  
Piscataway, NJ  
Program: Empower a Billion Lives

**National Auto Body Council**  
Oak Creek, WI  
Program: First Responders Emergency Extrication (FREE) Program

**Water Environment Federation**  
Alexandria, VA  
Program: National Green Infrastructure Certification Program

## In Memoriam



**Roy B. Evans, Jr.**, CAE, the former president and CEO of PCMA whose visionary leadership ushered in expan-



sive growth of the organization, passed away in July. Evans first joined PCMA as a member in 1961 before becoming the association's president in 1975. In 1982, he became president and CEO. Under Evans, PCMA widened its base of membership, which was originally exclusive to medical-meeting professionals. He also oversaw the launch of Convene Magazine, the PCMA Education Foundation (now the PCMA Foundation) and pcma.org. He was inducted into the Events Industry Council Hall of Leaders in 1993. Evans retired from PCMA in 2000, leaving behind an incredible legacy and a

## New AF Members

### Individual Members

**Mandy Aoieong**, Media Financial Management Association

**Steve Bernas**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Johnny Cather**, EMPIST

**Jennifer Daughtry**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Lori D. Dodd**, Chattanooga Convention & Visitors Bureau

**Pierre Droira**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Nate Echols**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Jay Elliot**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Sharon Garvey**, Cremation Association of North America

**Breanne Glisan**, Caesars Entertainment

**Jamie Grande**, Media Financial Management Association

**Kyle Harris**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Dennis Horton**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Tom Johnson**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Lynn Kahn**, Reingold Inc

**Caitlin Kuhn**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Olivia Mancino**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Matt Nelligan**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Heather Newcomb**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Melanie Nicasio**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Carly Ramsay**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Jamie Reed**, Meeting Expectations

**Rina Sandhu**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Tabitha Stallworth**, Visit Albuquerque

**Dain Sundstedt**, Better Business Bureau Of Chicago And Northern Illinois Inc

**Linh Vo**, American Board of Oral and Maxillofacial Surgery

**Jordan Volpe**, OpenWater

**Alexander William John Wald**, Financial Managers Society

**Amanda Wells**, Arlington Convention

**John Wilson**, Potawatomi Hotel & Casino

### New FORUM Plus Members

**Ninia Linero**, Academy of General Dentistry

**Susan Marquise**, American Association of Endodontists

**Sylvia Knox**, American Bar Association

**Andrea Kerr, Aleksandr Kholod and Igor Razin**, American College of Healthcare Executives

**Gloria Morales**, American Dental Association

**Bram Harris and Carrie McGraw**, American Society of Anesthesiologists

**Natasha Dawson**, Appraisal Institute

**Talia Lionetti and Valerie Mann**, Association Management Center

**Abojenae Grayer**, CCIM Institute

**Harry Arsoniadis, Danielle Christian, Colleen Dunphy, Bianca Lee, Mitri Licieur and Katie Weiler**, Congress of Neurological Surgeons

**Jessica Ides and Violet La Luz**, Emergency Nurses Association

**Christopher Schneider and Monica Sorenson**, HR Source

**Helen Day, Giovanni Schiavone and Megan Vincenti**, Institute of Real Estate Management

**Colleen Richardson**, National Marine Manufacturers Association

**Lisa Kuchar**, Society for Vascular Surgery

### New FORUM Plus Organizations

**The Society of Funk**





### Digital Extra

To access *Marketing General Incorporated's* "2019 Membership Marketing Benchmarking Report," visit the digital or mobile versions of FORUM.

## Membership Growing At "Innovative" Associations

From 2012 to today, associations reporting year-over-year membership growth has dropped from 52% to 45%, according to the 2019 Membership Marketing Benchmarking Report from Marketing General, Inc. However, associations that believe they have an innovative culture are much more likely to have seen membership increases over the past year, as well as the past five years. In fact, those organizations who have a specified process in place to for innovation and new ideas were significantly more likely to be experiencing membership growth. Overall, 76% of associations reported that their organization fosters a culture of innovation.

Associations that struggle with member retention and growth are more likely to have implemented or considered a new membership model. The most commonly adopted or considered model is a tiered model, followed by the addition of special interest pricing (student, retired, etc.) However, only 19% of responding organizations have actually put a new model in place over the past five years. Associations with an annual renewal rate of over 80% were much more likely to offer a company/institutional/organizational membership, indicating it may be easier to make the renewal case to an engaged organization than an individual.



### HOW INNOVATIVE WOULD YOU CONSIDER YOUR ASSOCIATION?

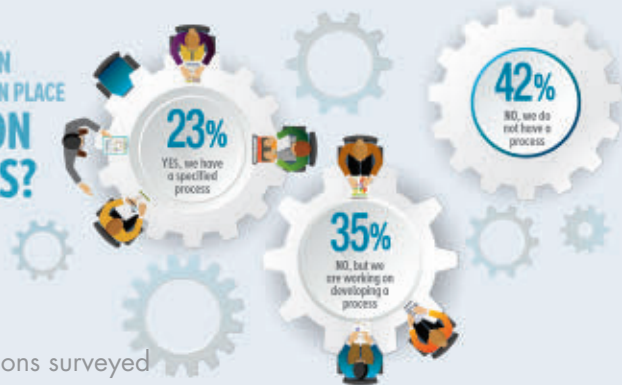
Total of 693 associations surveyed

### WHAT TYPE OF NEW MEMBERSHIP MODEL(S) HAS YOUR ASSOCIATION ADOPTED?



Total of 125 associations surveyed

### DOES YOUR ORGANIZATION CURRENTLY HAVE A PROCESS IN PLACE FOR INNOVATION AND NEW IDEAS?



Total of 692 associations surveyed

Source: Marketing General Incorporated's "2019 Membership Marketing Benchmarking Report"



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