

MAR•APR 2020 | V104•N2

INFORMING & INSPIRING
TODAY'S ASSOCIATION
PROFESSIONALS

Inside

CODE OF CONDUCT

Associations must consider the thoughts and views of all members when crafting bylaws.

18 Next in Line

24 Recruit the Right Board

28 Speak Easy



ALL IN AURORA

From a bustling craft beer and farm-fresh food scene to marketplaces and meeting spaces, we have it ALL in Aurora. Nestled against the back drop of the Rocky Mountains with easy access to Denver International Airport, see why Aurora, Colorado is becoming the newest destination to experience culture and innovation.

VisitAurora.com/FORUM | 720.809.8336

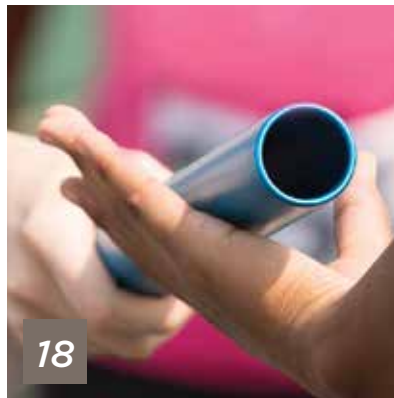


GATEWAY TO THE ROCKIES

Visit **AURORA**



12



18



24



28

Follow Us |



Features

COVER STORY

12 Inside Code of Conduct

Associations must consider the thoughts and views of all members when crafting bylaws.

CASE STUDY

18 Next in Line

Your association's success relies on volunteer succession.

ASK THE EXPERT

24 Recruit the Right Board

Research-based strategies for good governance.

Departments

PERSPECTIVE

4 Letter from Michelle Mason, President and CEO

PULSE

- 6 20/20 Board Health Checkup
- 7 4 Personality Types to Watch Out for on Your Board
- 7 Still Work to Do on Nonprofit Diversity
- 7 Plan for the Future

LAW REVIEW

8 Independent Contractor Agreements

MASTER CLASS

28 Speak Easy

Conquer your fears and nail your next speech or presentation.

IN THE KNOW

- 32 Holiday Showcase Welcoming Environment®
- 34 Bree Anne Sutherland Scholarship
- 36 In Memoriam: John Graham IV and Roderick Geer
- 38 Advertiser Index
- 42 Association News
- 44 Promotions and New Memberships
- 46 Education Calendar

WORK • LIFE

48 What's the One App You Can't Live Without?

FORUM MAGAZINE ONLINE

If you're interested in more exciting content from Association Forum, head to *FORUM* Magazine Online at forummagazine.org. Along with the ability to read current and past *FORUM* articles, members will be able to access exclusive content relating to each new issue. For March/April, you can check out how Amy Thomasson embarked on a journey to read 100 books in two years, and how the challenge helped her grow both personally and professionally.

In the January/February issue of *FORUM*, photos of Kathleen Fultz and Jamie Garcia were accidentally switched in the Emerging Leaders article. The correct version is on our website at forummagazine.org. We apologize for the error.

PUBLISHER

Michelle Mason, FASAE, CAE
mason@associationforum.org

DIRECTOR, EDUCATION AND CONTENT

Kara Brockman, CAE, DES
brockman@associationforum.org

PUBLICATION MANAGEMENT

GLC
glcdelivers.com



ADVERTISING REPRESENTATIVES

Director, Business Services

Phyllis Scott
312.924.7033
scott@associationforum.org

Marketing Strategist

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

Association Forum

10 South Riverside Plaza,
Suite 800
Chicago, IL 60606

312.924.7024

forummagazine@
associationforum.org

associationforum.org



BOARD OF DIRECTORS, 2019-20

Chair

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

Chair-Elect

Geoffrey Brown, CAE
CEO
National Association of
Personal Financial Advisors

Secretary-Treasurer

Paul Pomerantz, FASAE,
CAE
CEO
American Society of
Anesthesiologists

Immediate Past Chair

Lynne Thomas Gordon, CAE
CEO
American Association of
Orthodontists

Directors

Marc Anderson
Chief Operating Officer
Choose Chicago

Loretta DeLuca, FASAE
CEO
DelCor Technology
Solutions

Denise Froemming, CAE,
CPA, MBA
CEO/EVP
Institute of Real Estate
Management

Gregory Heidrich
Executive Director
Society of Actuaries

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

Bob Moore, MA, CAE
Executive Director
American College of
Osteopathic Family
Physicians

Kimberly Mosley, CAE, CPE
President
American Specialty Toy
Retailing Association

Carol Pape, CAE
Chief Operating Officer
Association of Professional
Chaplains

Matt Sanderson
President and CEO
SmithBucklin

President and CEO

Michelle Mason, FASAE,
CAE
Association Forum

Legal Counsel

Jed Mandel, JD
Chicago Law Partners, LLC

FORUM (ISSN 1056-0092)

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

Copyright © 2020 by Association
Forum. All rights reserved. State-
ments of fact and opinion are the
responsibility of the authors alone
and do not imply an opinion on the
part of the officers or members.

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

Editorial Contributions. You are
invited to share your expertise
and perspective. Article ideas and
manuscripts should, whenever
possible, reflect real and specific
experiences. Before writing,
please contact Association
Forum at 312.924.7024 for the
FORUM Editorial Requirements
& Guidelines, or obtain them at
associationforum.org. **FORUM**
reserves the right to edit all articles.

CONTENT WORKING GROUP, 2019-20

Working Group Chair

Teresa Brinati

Vice Chair

Amy Thomasson

Board of Directors Liaison

Denise Froemming, CAE, CPA, MBA

Staff Liaison

Kara Brockman, CAE, DES

Members

Kara Adams, CAE, MEd
Patrick J Andrus, CAE
Hanna Aronovich
Alexandra Campbell
Michele Campbell, CAE, MBA, RP
Stephanie Denvir, CAE
Denise Froemming, CAE, MBA, CPA
Lori Granich, MBA, RDN
Eric Jacobson
Rebecca L Headrick
Thomas Heidrich
Marilyn Mages, CAE

Matt Misichko
Brooke Morris-Chott, MPS
Sara Nelli, CAE
Mike Norbut
Lynn Pehanich
Evan Summers
Candice Warltier
Nathalie Williams
Dave Siehoff, CPA
Nick Strozza
Courtney C Walsh
Jennifer Weed

FRM-005



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



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

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

Schedule a site visit or learn more at SignatureBoston.com or 877-393-3393.

Boston. Bringing Great Events to Light.

Signature
BOSTON
Remarkable experiences.
Imagination realized.

MASSACHUSETTS CONVENTION CENTER AUTHORITY



MICHELLE MASON, FASAE, CAE

PRESIDENT AND CEO
ASSOCIATION FORUM

Organizational Agility Is Born Out of Good Governance

Organizational agility. Your capability to change and adapt; to keep up with technology, cultural shifts and overall market conditions. So how can you achieve new heights and remain agile as an organization? Think of governance as your springboard.

We're all striving for governance that works, but truly good governance can help you stay flexible in a changing market and meet new challenges head on. The key is to have your processes and procedures in place now—don't wait until there's a specific need. It's our job as association staff to help our boards anticipate change and adjust our governance accordingly. But how?

One way Association Forum adjusts is by implementing a cycle of improvement. It's a process that allows for planning, execution, measurement of progress and careful assessment. All of this is focused around our mission, vision and core values. It is important to continually adapt and strive for better processes, but also to stay focused on the foundational aspects of your association.

When Association Forum crafted our strategic plan in April of last year, we focused on where we wanted to be in the year 2025. We captured objectives, tied them to initiatives and applied measurements for success. But we also put our mission, vision and core values at the center of every decision. Our goals for the future are important, but more important are the steps we take to get there. Relying on our core values as an organization ensures that we don't lose ourselves along the way.

Another key to governance is aligning staff and board activities and communicating transparently to both parties. Your staff should be privy to board decisions and your board should be updated on regular progress made by staff members. This two-way communication empowers board members to make better, more informed decisions.

While the pace of technology is creating a larger need for corporate agility, it's also a tool that can be leveraged to bring efficiencies to governance. Here are three ways that associations are utilizing technology to streamline their governance:

1. Association member forums can be utilized to collect member concerns that may have bearing on policies and other organizational changes. Consider posting your governance documents and opening a discussion thread on the topic of governance.
2. Project management software such as Asana, Basecamp and Smartsheet can help association staff juggle day-to-day work. Set up a project to specifically address the ongoing work of your organization's governance. Assign responsibilities and regularly check in on the progress.
3. Consider moving governance documents to Google Drive or your organization's website to make them searchable for staff and board members. Organizations tend to have one staff person who is the "governance guru." While this person is extremely valuable, all staff and board members should be held accountable for reading and understanding basic procedures and policies.

Finally, the best way to stay agile in this new decade is to adopt a growth mindset. Make sure your staff and board members are always on the lookout for opportunity within and outside of the organization. Be diligent in your maintenance of governance documents, but also be willing to make changes when needed. We can't know what the next 10, 15 or 50 years have in store, but we can prepare our organizations to take change in stride and flourish for decades to come. [F](#)

CYCLE OF IMPROVEMENT



As part of our efforts to provide a Welcoming Environment® for our members, we are providing a copy of our Core Values translated into **Italian** 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.

Nell'ambito del nostro impegno a fornire un Welcoming Environment® per i nostri membri, forniamo una copia dei nostri valori fondamentali tradotta in italiano da Interpro Translation Solutions, Inc.

Essere un Welcoming Environment

Siamo un ambiente accogliente che cerca attivamente di valorizzare la comunità più ampia riconoscendo che il tutto è maggiore della somma delle parti. Faremo sentire benvenuti, rappresentati, coinvolti, ispirati e responsabilizzati tutti quelli che interagiscono con noi.

Adottare innovazione e qualità

Ci piace provare nuove idee e cercare ispirazione all'interno e all'esterno della comunità dell'associazione: apprezziamo i miglioramenti grandi e piccoli. Incoraggiamo ed encomiamo la sperimentazione di innovazioni; tuttavia, sappiamo quando è il momento di la spina. Miriamo a migliorare continuamente.

Divertirsi e rimanere positivi

È un dato di fatto che in genere si trascorre più tempo con i colleghi che non con la propria famiglia. Ci sforziamo di rendere il nostro ambiente di lavoro divertente, positivo e in generale, un ottimo posto di lavoro.

Comunicazione aperta e onesta e lavoro di squadra

Se non lo sai, non lo sai! Una comunicazione efficace è fondamentale. Coltiveremo un ambiente in cui parliamo apertamente, onestamente e con l'obiettivo di costruire una squadra migliore. La trasparenza viene accolta in modo costruttivo. Collaboreremo per portare valore ai membri.

Responsabilità: il nostro must

Ci riteniamo responsabili e ci aspettiamo che le persone pongano domande e sollevino preoccupazioni in modo rispettoso. Poiché il lavoro richiede team interdipendenti e collaborazione, ci fidiamo e dipendiamo l'uno dall'altro per essere reattivi e offrire servizi di valore e di qualità agli stakeholder.

Vincere con rettitudine

Operiamo eticamente, contribuendo con il nostro tempo, i nostri talenti e il nostro know-how per far progredire le comunità in cui lavoriamo e viviamo. Ci impegniamo a far crescere la nostra associazione in modo da favorire l'ambiente e la società.

20/20 Board Health Checkup

For organizations updating or reforming their governance models, there are many variables at play. Need guidance? Look no further, as the Association Management Center provides a checklist to help navigate the process.

Governance Area Description	Yes	No	Requires Action
1. Board Size and Makeup			
Not too big, not too small, just right—balanced.			
Crafted on the basis of needed competencies, focusing on the future and diversity/balance.			
2. Board Role			
Respect for fiduciaries—care, loyalty, obedience.			
Respect for conflicts (of interest).			
Respect for the “non-official” fiduciaries of curiosity and foresight.			
3. Board/Staff Partnership			
Appreciation for who is best equipped to do what.			
Empowerment to get the right things done well.			
4. Trust and Respect Among Leaders			
Less focus on former leaders.			
More focus on future leaders.			
5. Civility in the Community			
Maintain civility in community and the boardroom.			
6. Nimble and Focused Decision Making			
Appropriate decision-making methodology and authority to anticipate changes in the competitive environment.			
7. Clarity on Priorities			
Alignment on what we can do.			
Alignment on when we can do it.			
Alignment on the resources it takes to accomplish it.			

Governance Area Description	Yes	No	Requires Action
8. Committees/Work Teams that Contribute Meaningful Work			
Pledge for clarity on what a work team should do.			
Clarity on the authority to get the work done.			
Resources to get the work done.			
Nimble committee/work team structure to accomplish the work.			
9. “Think Big” Leads to Do Big			
Appropriate level of risk-taking to think and do big.			
10. Strategy, Generative Discussions and More Strategy			
First half of each board meeting focused on strategy and generative discussion.			
First half of each board meeting has no reports, updates or operational issues.			
11. No Dysfunctional Harmony			
High quality decisions.			
Managed, thoughtful, respectful conflict.			
12. Culture, Candor and Curiosity			
Mindful board culture of candor, curiosity, inquiry that builds trust.			
Assumption of good intent in all volunteer and staff leaders.			

Image: nndanko/iStock Collection and lightmax/E+ Collection via Getty Images

4 Personality Types to Watch Out for on Your Board



Dominator

These people speak loudly, at length and often. They can overpower less outspoken members of the board and railroad conversation.



Ghost

This type of person is absent, missing meetings or disregarding emails, leveraging their influence by holding up decisions.



Interrogator

People who ask questions simply to sow doubt or derail discussions can be a drag on your board's time and muddy the group's clarity.



Victim

Everyone comes up short once in a while, but this type of person may find a reason to explain their lack of engagement or follow-through in almost all situations.

Adapted from "The 4 Types of Power Players: How They Disrupt Boards and What To Do About Them," by Donald Summers

Images: 4x6 and LightFieldStudios/iStock Collection, stevecoleimages and MATJAZ SLANIC/E+ Collection, via Getty Images

Still Work to Do on Nonprofit Diversity

While inclusion efforts are becoming standard essentials for many organizations, some nonprofit boards are aware that they still have work to do in creating a diverse environment.

61% of nonprofit boards of directors **do not feel their makeup reflects the communities they serve.**

About **70%** of nonprofit board **positions are held by white members.**

Only **11%** of nonprofit boards **have a written statement or policy on diversity and inclusion.**



Source: "The Governance Gap: Examining Diversity and Equity on Nonprofit Boards of Directors," by Molly Delano Brennan with Miecha Ranea Forbes, January 2019



Plan for the Future

Boards that focus on strategic planning at least 25% of the time and operate under a strategic plan have better results. Instead of getting bogged down with day-to-day operational details, they trust staff and team members to perform their duties.

Source: "Effective Governance Practices for Current and Future Success," ASAE

Icon made by monkik from www.flaticon.com



Independent Contractor Agreements

BY KIMBERLY A. PENDO

Q: I UNDERSTAND THAT THERE HAS BEEN RENEWED SCRUTINY OF THE QUALIFICATIONS FOR INDEPENDENT CONTRACTOR STATUS. WHAT NEEDS TO BE INCLUDED IN MY INDEPENDENT CONTRACTOR AGREEMENTS TO AVOID ANY PROBLEMS?

A: To distinguish independent contractor from employer-employee relationships, the most important provisions to be included in an independent contractor agreement are those documenting the individual's independence and control over his or her work. Proper classification of workers as employees or independent contractors is essential, especially in the eyes of the IRS, the Department of Labor and state employment agencies. If a worker is misclassified, the organization may be responsible for substantial federal and state tax, benefits and overtime liabilities. When evaluating whether a person providing services to the association is an employee or independent contractor, an association must consider all information that provides evidence of the degree of control and independence the person will have in performing his or her work.

The facts that provide evidence of the degree of control and independence fall into three established categories—behavioral, financial and type of relationship. Accordingly, independent contractor agreements should provide that, although the individual must report to the organization and follow its policies, the

contractor is responsible for the means, time and manner in which he or she provides services. The organization should not control or have the right to control what the contractor does or how he or she does the work. The agreement also should acknowledge that the contractor may work for others. And, it is prudent to have the agreement explicitly state that the contractor may not speak or act for the organization unless specifically authorized in writing.

Generally speaking, compensation to independent contractors should not resemble payments made to employees. In fact, opportunities for contractors to share profit or loss show greater independence. The agreement also must state the contractor is solely responsible for paying taxes and withholding, for providing benefits for the contractor and his or her employees and subcontractors, and for all expenses incurred in operating his or her business. Ideally, all the foregoing factors, taken together, will help demonstrate that the contractor is in business for him or herself, and not economically dependent on the organization for his or her livelihood.

Organizations must carefully consider and document each of the above factors in the independent contractor's agreement. While there is no established number of factors or criteria that definitively determine that a person qualifies as an independent contractor, the key is to evaluate the entire relationship, consider the degree or extent of the right to direct and control, and to document each of the factors used in making the association's determination. The following are other key provisions to include in independent contractor agreements:

Clarify services, deliverables and timing up front.

Even when a project seems clearly defined at the outset, the independent contractor's view and the organization's view of the "scope of work" may differ. Make sure the agreement specifies the final product and all the elements important along the way: interim reports, phone calls, meetings, access to key contact people and deadlines. Because the scope of the project may change as the project progresses, make sure the agreement requires any changes in scope and cost to be agreed to in writing.

Beware hidden costs or fees.

Fees for the project are inextricably intertwined with the project's scope. The organization must know what costs and expenses are included and what will be extra. The agreement should clearly state whether the fees are estimated or fixed or vary with time spent. The contract should delineate what expenses, if any, the organization will pay or reimburse. If compensation is based on "net revenue," net revenue must be defined.

Own the work product.

A big frustration for organizations is finding out they don't own what they thought they bought. Unless the organization's ownership of the independent contractor's work product is clearly established in writing in the agreement, the creator (the contractor) owns the work, not the person who paid for it. The organization at best only has an implied license to use the independent contractor's work product. And, if third party intellectual property (e.g., software) is necessary to be able to use the work product, the agreement should ensure (1) the contractor has the unencumbered right to use the third party's intellectual property for the organization's purposes and (2) the organization has the right to continue to use the third party's intellectual property—through a

broad license—even after the work is complete or the agreement has been terminated.

Ensure confidential information is protected.

The agreement should provide that the independent contractor will use the organization's confidential information—for example, membership lists, financial data, business plans and the work product itself—only for the benefit of the organization. In other words, the independent contractor may not disclose information to anyone other than the organization or its representatives, such as the contractor's other clients, or use the organization's information in any way that would harm the organization. Provisions prohibiting solicitation of the organization's members or clients may also be important.

Obtain performance assurances.


The independent contractor should be willing to stand behind his or her product or service and warrant that the work will be done professionally and meet other applicable standards in the field (e.g., as a software provider). In addition, he or she also should warrant that the product will not infringe others' copyright or trademark rights.

Include indemnification.

The independent contractor should indemnify the organization for its work and against any representations or warranties made in the agreement. The organization should also consider provisions explicitly limiting its liability to the independent contractor.

Clarify when and how the agreement terminates.

An agreement with an independent contractor should have a specific term, and it should be clear who has the right to terminate the agreement, and under what conditions, before the term expires.

The above list highlights the most important terms for agreements with independent contractors. Other typical contract provisions—notice, choice of law, assignment—also should be included to ensure the organization is well-protected. 

THIS LAW REVIEW WAS WRITTEN BY **KIMBERLY A. PENDO** AND EDITED BY **JED R. MANDEL**, BOTH OF WHOM ARE FOUNDING MEMBERS OF CHICAGO LAW PARTNERS, LLC. CLP SERVES AS THE ASSOCIATION FORUM'S GENERAL COUNSEL.



KIMBERLY A. PENDO, JD

CHICAGO LAW PARTNERS, LLC



JED R. MANDEL, JD

CHICAGO LAW PARTNERS, LLC



STAY UP TO DATE


Find the latest news on Chicago lobbying ethics at chicago.gov/city/en/depts/ethics/provdrs/lobby.html.

As you may be aware, the City of Chicago's City Council adopted a new lobbyist registration ordinance (SO2019-5305) in July focused on ethics reform. Among other things, the new ordinance requires a nonprofit organization's paid staff, contractors and pro bono representatives, as well as volunteer leaders and organizers (in some circumstances), to register as lobbyists with the City if they represent or support a City law or ordinance that would further the interests of the organization or its membership. While generally supportive of the Mayor's efforts to implement ethics reform, the Forum had significant concerns with the new ordinance and was able to share those directly with the Mayor's office and the Board of Ethics.

Specifically, the Forum's efforts focused on improving the new ordinance's overly broad and vague definition of "lobbying" and overbroad and burdensome registration and reporting requirements for nonprofits.

The new ordinance was set to go into effect on January 20, 2020. Given the new requirements and the desire of all stakeholders that the ordinance be rolled out without undue hardship, we are happy to report that the Mayor has delayed the enforcement and effective date of the nonprofit lobbyist registration requirements by three (3) months to April 20, 2020. In the meantime, the City Board of Ethics has been directed to develop rules and advisory opinions to provide further clarity and direction to nonprofits and their leaders regarding their registration obligations under the new ordinance.

We will continue to advocate on behalf of the Forum and its members with respect to the ordinance and keep you informed of developments.

If you have any questions, please feel free to contact Kimberly Pendo at kpendo@clpchicago.com or Jed Mandel at jmandel@clpchicago.com. 

COOK & KOCHER
INSURANCE GROUP

Group Health, Dental, Life, and LTD Insurance

Directors and Officers Liability Insurance

Property/Casual Insurance

Cyber Liability Insurance

Specialty Errors and Omissions Insurance

Jack Cook
CLU, ChFC, RHU
Jackc@cookandkocher.com
www.cookandkocher.com

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

FOCUS

An organization lacking leadership is doomed to lag behind. Learn how to organize your association's governance models to keep members active, engaged and happy.

“Codes of conduct allow us to engage positively and productively within our communities by spelling out the values our organizations wish to foster and, in the process, defining desired behavior.”

Inside Code of Conduct, *pg. 16*

“A thoughtful approach to succession planning allows future administrations to further the work of its predecessors.”

Next in Line, *pg. 18*

“The boards we found to be instrumental in our research had common trends of transparency, diversity, cultivation, anticipatory behavior and identifying core competencies.”

Recruit the Right Board, *pg. 25*

THE RIGHT DIRECTION



Inside

CODE OF CONDUCT

Associations must consider the thoughts and views of all members when crafting bylaws.

By Teresa Brinati



Addressing bad behavior by fans is a top priority for the National Basketball Association (NBA). In a 2019 player poll conducted by “The Athletic,” 13.7% cited fan behavior as the NBA’s most pressing issue.

Last season alone there were several incidents—including racist taunts—directed at players, including superstars Russell Westbrook, DeMarcus Cousins and Kyle Lowry. The fan code of conduct has been a standard announcement in every NBA arena for years. It’s now being shown on gigantic video screens and promoted throughout each game. And the league is continuing to strengthen the code—zero tolerance for abusive or hateful behavior will be the policy moving forward, according to NBA.com.

Professional and trade associations are similarly playing both offense and defense with their codes of conduct to address issues on their own courts—particularly at conferences and on social media where member interactions are heightened. No matter the venue, there’s no room for hateful behavior or bullying, and addressing such violations is crucial. Associations are also finding creative ways to remind members about their codes of conduct, tuning up their codes to apply to virtual environments, and incorporating inclusivity language to fortify policies and procedures. There are both bold and small actions that you can take to help shape members’ positive interactions within your association.

Be Intentional and Aspirational

According to the Ethics and Compliance Institute, a well-written code of conduct clarifies an organization’s mission, values and principles, linking them with

standards of professional conduct. A code spells out values the organization wishes to foster and, in doing so, defines desired behavior.

“We use the code in a proactive way—we intend for it to be aspirational,” says Marty Wolf, co-chair of the leadership team for the Committee on Professional Ethics of the Association of Computing Machinery (ACM). Wolf was part of a volunteer-led initiative that improved the code for ACM’s 100,000 members.

“We envision helping people to have conversations about ethics and social responsibility first as students and then in the workplace,” adds Wolf, who is also a professor of math and computer science at Bemidji State University.

A new Code of Ethics and Professional Conduct was adopted in 2018 and ACM goes to great lengths to promote it. Every ACM member agrees to support the Code when they renew their membership. ACM produced a “Code Booklet” that is distributed to all members and at conferences and workshops.

“We have representatives speak about the Code—and computing ethics in general—at workshops, conferences and workplaces around the world,” Wolf says. “Most textbooks that are geared toward computing ethics include the Code and often contain a chapter that introduces it.”

“We use the code in a proactive way—we intend for it to be aspirational. We envision helping people to have conversations about ethics and social responsibility first as students and then in the workplace.”

MARTY WOLF, CO-CHAIR OF LEADERSHIP TEAM, COMMITTEE ON PROFESSIONAL ETHICS, ASSOCIATION OF COMPUTING MACHINERY

THEY


313%
 LOOKUPS

The gender-neutral pronoun “they” was **Merriam-Webster’s Word of the Year** in 2019, which noted that lookups for the term increased by 313% over the previous year.

In addition to the Code, the ACM has a policy against harassment. Every conference supported by ACM must implement this policy. Participants are advised of the policy at the time of registration. Attendees are reminded of this policy and its highlights during the opening plenary session.

The American Dental Association’s (ADA) codes of conduct apply to its various stakeholders. Its Member Conduct Policy was adopted in 2011 and is part of ADA’s policy manual. Its Professional Conduct Policy and Prohibition Against Harassment is addressed during the onboarding of employees and is included in the ADA employee handbook.

Although the ADA’s core values and precepts—including its codes of conduct and policies of diversity and inclusion—permeate its annual meeting, there is no specific reference to the codes of conduct at the actual conference. ADA’s Professional Conduct Policy does, however, explicitly state that it is applicable at all association functions and events.

In addition, all volunteers participate in an orientation when taking a leadership position at the ADA. The orientation includes a detailed discussion of all aspects of the Member Conduct Policy and Professional Conduct Policy, as well as principles of corporate governance, conflict of interest and

the importance of diversity and inclusion to the sustainability of the association.

Cultivate Online Civility

One of the biggest challenges that associations face is civility on virtual channels. From blogs to websites to social media, there are continuous opportunities for posting and virtual interaction. To elevate discourse and foster meaningful social engagement, the American Medical Association (AMA) has a digital code of conduct that outlines its community guidelines and expectations for those engaging with its posts, as well as for employees who are active on social media and AMA members who amplify AMA messages.

“Our code of conduct is our North Star,” says Caitlin Ganet, AMA’s senior manager for Social Media and Community Engagement. “We strictly enforce our code of conduct when it comes to hate speech, discriminatory language and the spreading of blatant misinformation—all of which are prohibited.”

Violations of the code are dealt with on a case-by-case basis, as each is unique. “With our grounding in science and medicine, we encourage discussion and the exchange of ideas,” Ganet adds. “But when someone is in plain violation of our code of conduct,

CODES OF CONDUCT

You can access the Codes of Conduct for each of the organizations mentioned in this article online, listed here:

- > **American Dental Association:** ada.org/en/about-the-ada/principles-of-ethics-code-of-professional-conduct/ada-ethics-resources
- > **American Medical Association Digital Code of Conduct:** ama-assn.org/general-information/general-information/code-conduct
- > **Association of Computing Machinery Code Booklet:** www.acm.org/binaries/content/assets/about/acm-code-of-ethics-booklet.pdf
- > **Communications Council Best Practice Guide Social Media Code of Conduct:** [communicationscouncil.org.au/downloads_tcc/2012/CC_Social Media Code of Conduct_FINAL.pdf](http://communicationscouncil.org.au/downloads_tcc/2012/CC_Social%20Media%20Code%20of%20Conduct_FINAL.pdf)
- > **Digital Library Federation Code of Conduct:** diglib.org/about/code-of-conduct/
- > **NBA Fan Code of Conduct:** nba.com/nba-fan-code-of-conduct
- > **Society of American Archivists:** www2.archivists.org/statements/saa-code-of-conduct

af | Conference & Room Rentals



Looking for the perfect place to hold your next meeting?
We have it!



For more information visit
associationforum.org/browse/afconfcenter

Discounted rates for
Association Forum
members!

Contact Phyllis Scott for
details at 312.924.7033 or
afconfcenter@associationforum.org

we do not hesitate to hide their post or, if necessary, ban the user from our page.”

Ganet shares a specific example: March 30 is Doctors’ Day, and each year AMA spotlights physicians and medical students, sharing their stories on AMA’s social media channels. In 2019, AMA shared an image and story of a female physician who wears a hijab. The innocuous post unleashed a number of racist comments, all of which were irrelevant and brazenly discriminatory. The comments upset not only the individual being profiled but also a number of AMA members and board members who saw the post.

“Our team rushed into action, hiding comments and banning users who clearly violated our code of conduct,” Ganet states.

“In those instances, we view banning as a warranted response, because there is no place for hate speech in the space we’ve created to celebrate physicians.”

ADA reported that it also maintains a separate policy covering proper use of social media. That policy is applicable to both employees and volunteers. The policy is addressed during onboarding and a copy of the policy is accessible to all employees and volunteers. Infractions by staff would be addressed by the Human Resources Division, while issues with volunteers would be addressed within ADA’s leadership structure, including, if warranted, the Board of Trustees.

Take Small Actions

The Digital Library Federation (DLF), which has nearly 200 member institutions, provides specific examples in its Code of Conduct of how to provide a conference experience that is inclusive of all people. DLF refers to them as “small actions” that attendees and presenters can take to meet this goal: “We suggest: listening as much as you speak; encouraging and yielding the floor to those whose viewpoints may be underrepresented in a group; using welcoming language, for instance by honoring pronoun preferences and favoring gender-neutral collective nouns (‘people,’ not ‘guys’); accepting critique graciously and offering it constructively; giving credit where it is due ...”


Many of these small actions can easily be incorporated by associations. The one gaining traction in

many organizations has to do with language. While using respectful language in general is implicit in daily conduct, there’s a growing sensitivity to pronoun usage, as the DLF code illustrates. In fact, the gender-neutral pronoun “they” was Merriam-Webster’s Word of the Year in 2019, which noted that lookups for the term increased by 313% over the previous year. As Merriam-Webster.com further explains, “More recently, though, ‘they’ has also been used to refer to one person whose gender identity is nonbinary, a sense that is increasingly common in published, edited text, as well as social media and in daily personal interactions between English speakers.”

DLF’s code of conduct helps to foster an inclusive and welcoming environment. DLF requests attendees’ pronoun preferences on conference registration forms and instructs panel moderators to ask every panelist their pronoun preference.

Members have embraced this code improvement. “I have made it a practice to wear an enamel pin to every conference with my pronouns,” says Rebecca Pattillo (she/her), metadata librarian in Archives and Special Collections at the University of Louisville.

Revisit and Reinforce

Codes of conduct allow us to engage positively and productively within our communities by spelling out the values our organizations wish to foster and, in the process, defining desired behavior. Consider what steps your association might take to improve interactions among your members. Whether revisiting your code, developing one specifically for social media, or encouraging the use of inclusive language, it’s an opportunity to reinforce a shared mission. While having a code of conduct may not always be a slam dunk for best behavior, it’s still one of the most important policies your organization can put into action. 

TERESA BRINATI IS THE DIRECTOR OF PUBLISHING FOR THE SOCIETY OF AMERICAN ARCHIVISTS AND MAY BE REACHED AT TBRINATI@ARCHIVISTS.ORG.

Follow the Rules at Association Forum Head online to associationforum.org/codeofconduct to learn about acceptable behavior for members both in person and for online communities.

“With our grounding in science and medicine, we encourage discussion and the exchange of ideas. But when someone is in plain violation of our code of conduct, we do not hesitate to hide their post or, if necessary, ban the user from our page.”

CAITLIN GANET, SENIOR MANAGER FOR SOCIAL MEDIA AND COMMUNITY ENGAGEMENT, AMERICAN MEDICAL ASSOCIATION





**Did you
see page
12?**

...that's us!

GLC is the official publishing partner of Association Forum. If you like what you see here, we can do it for your association publication, too.



Joe Stella
VP, Association Growth
847-205-3127
jstella@glcdelivers.com
glcdelivers.com/associations
a marketing communications agency



NEXT IN LINE

Your association's success relies on volunteer succession.

By *Eric Jacobson*

Establishing and executing a volunteer succession strategy is a daunting, yet necessary responsibility faced by leaders of nonprofit organizations. Poor transition planning for the board and key committees can result in stagnation, disruption and failure for the association. Therefore, it is essential that an organization's volunteer succession plan factors in multiple contingencies to ensure that the organization has the volunteers needed to move and achieve its long-term goals and mission. A thoughtful approach to succession planning allows future administrations to further the work of its predecessors.

A strategic succession plan involves creating a framework that accounts for the what-ifs and life-changing events that affect volunteers. It also entails creating a pipeline of volunteers, and ensuring those volunteers are the right fit and prepared for their future duties. Once established,

the succession plan should grow and evolve with the organization. Following are some tips from organizations that have achieved volunteer succession success.

The Framework for Volunteer Succession

An effective volunteer succession plan starts with goals and a clear vision. What do you want the plan to achieve? What processes are required? What roles does the plan encompass and who are the decision makers?

For Community of Experts of Dassault Systèmes Solutions (COE), the board is proactive in its approach to volunteer succession, says Executive Director Bret Kelsey.

"The best time to create a succession plan is when things are going well and you have good people in place," says Kelsey, a 27-year veteran of association management.

For COE, the focus is on finding the right volunteers to serve on the board.

Committee chairs or task force heads are often tapped, but Kelsey cautions the decision-making should be thoughtful. Not all committee chairs are in strategic roles, because some committees require more hands-on, tactical work. In general, though, committee leaders are a great source of potential board talent. And the pipeline for

committee leadership should be a focus of the organization's overall succession plan.

Another important part of the process is clearly identifying—and communicating—the roles, responsibilities and expectations for each of the leadership positions. COE reports annually to its membership regarding the board succession plans as well as what the board roles entail. The report achieves two goals: transparency about board activities and recruitment for future leadership service.

Other criteria detailed in the plan should include length of service for both board members and officers. Kelsey suggests that boards turn over every four to six years, which would mean two- or three-year terms for individual board members. The board member would then either get in the leadership queue to become an officer or move off the board. Again, there may be individuals who move up more quickly based on need or other circumstances, but this is a basic structure for successful organizations.

Kelsey also recommends having one-year terms for officer positions, but no more than two-year terms. So, if there are three officer positions, and a volunteer eventually serves in each role, this would require another three or four years on the board. In all, you would be asking for a seven- to 10-year commitment from volunteers who serve on the board and move into leadership roles. That's not

including any time spent on committees or task forces. For many associations, this structure effectively identifies and grooms new volunteer leaders while maintaining continuity from one board to the next.

The board should also set aside time for self-assessment to think about board composition in light of the association's overall strategic plan. Which

skills, competencies or representation might the board need going forward to advance the mission and meet strategic goals? More importantly, what is currently missing on the board—such as representation, skills or thought leadership? “You want critical thinkers, but you also want a diversity of opinion. Not people that just ‘think like us.’ You don’t want to slow the organization from growing and innovating,” Kelsey says.

Finally, Kelsey notes that the association should have a rigorous process for identifying and recruiting the right volunteer leaders. This process should run through a Nominating Committee or Leadership Management Committee tasked with finding, recruiting, vetting and assigning volunteers to positions that put them on the right track to become leaders.

Creating a Pipeline

Once a succession plan is in place, long-term success is dependent on developing a pipeline of volunteers. More than a decade ago, the Society of Gastroenterology Nurses and Associates, Inc. (SGNA)—an 8,000-member professional association of nurses and associates dedicated to the safe and effective practice of gastroenterology and endoscopy nursing—faced a volunteer drought. In response, its board launched a robust volunteer engagement effort designed to increase loyalty among its

members, improve retention and produce an always-ready pipeline of next-generation volunteers. Today, after years of refinement, SGNA has found itself in the enviable position of having a healthy reserve of ready-to-serve volunteers for its leadership positions within its board, committees and various task forces.

SGNA's systematic, annual process accomplishes the following:

- Identifies volunteer needs
- Clearly communicates expectations
- Provides mentorship and development opportunities
- Evaluates performance
- Elevates promising volunteers into positions of increased responsibility, from volunteer to association president

For the call-to-action, a multipronged approach is a best practice. Putting out a call through association meetings and events, in-house—or industry—publications, the website and social media sites is an effective way to reach great candidates. But active recruiting must also be a part of the strategy. Some associations even appoint talent councils, whose sole charge it is to find the right people to serve on boards, committees or advisory councils. These talent councils can also be used to mentor future board members. And no matter what tactics are employed, it's not enough to have one conference call a year to brainstorm potential candidates. It needs to be a year-round process.

“Remember to thank your committed volunteers—often,” says SGNA Executive Director Kim Eskew. “Our volunteers deserve to feel appreciated and valued.”

As you create a pipeline of volunteer candidates, Eskew recommends considering a variety of sources. Volunteers can step forward themselves, be nominated by someone else, be recommended by a board member, suggested by staff or be sought out by a nominating committee. Regardless, a vetting process should be conducted to discover which candidates have leadership potential.

“The best time to create a succession plan is when things are going well and you have good people in place.”

**BRET KELSEY, EXECUTIVE DIRECTOR,
COMMUNITY OF EXPERTS OF
DASSAULT SYSTÈMES SOLUTIONS**

WHAT TO LOOK FOR IN FUTURE LEADERS



Set the bar high in your search for future volunteer leaders. The best leadership candidates should exhibit not only the requisite experience and knowledge, but also the skills to enhance your organization. If you see members exhibiting these skills, jump in and ask them to volunteer!

- > Are they strategic thinkers?
- > Do they possess good judgment?
- > Are they consensus builders?
- > Do they value learning?
- > Do they have the time to commit?
- > Are they politically savvy?
- > Have they served in past volunteer leadership roles?
- > Do they have high ethical standards?
- > Do they inspire others?
- > Are they prepared to serve as stewards and ambassadors for the organization?
- > Do they bring diversity to the board in representation, skills or thinking?

The people who embody these qualities should be assigned to positions where they can gain leadership experience and visibility within the association. That might mean assigning them to lead a task force or work group, or appointing them to chair a committee. In these roles, they can hone and demonstrate their leadership skills, while also giving the organization a chance to see how they perform.

"Rather than recruiting each year on a one-off basis, we create a talent lineup that we can tap at any time," Eskew says. "You want to have a pipeline of people in your industry or profession who are interested, eligible and capable of serving."

Ensuring the Right Fit

The process to build that pipeline needs to be year-round, which is the case for the Financial & Insurance Conference Professionals (FICP), an organization that provides access to education, experience and resources targeting the needs of financial services and insurance meeting professionals. "Research proves that most people don't volunteer unless they're asked—so it behooves the board or the committee members to have conversations throughout the year to identify potential new board members and educate them about the process," says FICP Executive Director Steve Bova. "Identifying and recruiting people to serve is a year-long sport."

Keep in mind that the complexity and speed of life today makes it more difficult for people to give the time—or make it a priority—to serve on a board. "It's a pretty big commitment that requires a lot of responsibility," says Bova. "It's not just showing up at a few meetings. It's about being engaged, serving and doing what is right for the organization."


Considering that fact, Bova recommends a proactive approach. The most successful organizations seek out the most talented board members, rather than just letting candidates come to

them. It's important to keep in mind great candidates are usually more than willing to serve if approached. "In many cases, people who seem reluctant to volunteer eagerly do so if asked," says Bova.

In addition, it's vital for people to understand the roles they are being offered and the expectations that come with it before making the commitment to serve. FICP uses a simple handout called "Before You Say Yes," which is a checklist to determine if the candidate understands what's required. For example, it asks if they fully appreciate the time commitment needed and understand the fiduciary obligations of serving. Also, it asks if they have the support of their employer, and if there are any conflicts of interest.


Further, FICP has a resource it gives to potential board members that outlines the benefits of serving. For the individual, it's an opportunity to grow personally and professionally, as well as affect change, give back, and be more involved as an industry leader. It also notes that serving will provide good visibility for the board member's company.

Finally, Bova notes that creating a valuable and beneficial volunteer experience might make volunteer leaders want to stick around indefinitely. However, if the same volunteers keep cycling through, it creates a perception that the organization group is a clique, which can be an unintentional threat to any succession process. A vital step in a good succession plan is ensuring volunteers understand when it is time to step down gracefully and let others step in.

Even with all these best practices in place, an association's volunteer recruitment efforts must be flexible so they can evolve as the organization and its industry or profession. Ultimately, these efforts are the key to ensuring the organization has a lasting and valuable impact. 

ERIC JACOBSON IS THE DIRECTOR OF CORPORATE COMMUNICATIONS AT SMITHBUCKLIN.


 **Donate Your Time** Thinking about volunteering? Go to associationforum.org/network/volunteer to learn more.




MEETING IN BOURBON CITY MEANS BARRELS OF FUN

There's a whole new meeting experience waiting for you in downtown Louisville. From our recently unveiled convention center to eight bourbon experiences within walking distance, it's easy to see why *Smart Meetings* named Louisville one of "11 Cities on the Rise You Can't Pass Up." Because when you meet in Bourbon City, you get so much more than a meeting. Learn more at GoToLouisville.com/Meet



Photo by:  @kevinraybrost | #bourboncity | #louisvillelove



CHARLOTTE, NORTH CAROLINA

MEET IN CHARLOTTE

\$126.9 MILLION CONVENTION CENTER
EXPANSION UNDERWAY

The 16th largest city in the nation, Charlotte's a breeze to access from most major cities, and it's a cinch to navigate once you're here. With a compact, walkable downtown called Uptown by locals, the Queen City is home to diverse attractions, professional sporting venues, innovative culinary offerings and thousands of hotel rooms, making Charlotte a premier destination for planners who aim to impress.



📍 CHARLOTTE CONVENTION CENTER



📍 NUVOLÉ ROOFTOP TWENTYTWO

With one of the top 10 busiest airports in the world — American Airlines’ second largest hub — Charlotte Douglas International Airport is just 7 miles from Uptown and the 550,000-square-foot Convention Center. The centrally located facility is connected to the NASCAR Hall of Fame, across the street from the 700-room Westin Hotel, and within walking distance of the soon-to-be Grand Bohemian, MOXY Charlotte Downtown and the JW Marriott.

When the \$126.9 million expansion is complete in 2021, planners will enjoy an additional 50,000 square feet of meeting room and pre-function space, bringing the total square footage to approximately 600,000. The Convention Center will feature 280,000 square feet of exhibit space and 154,000 square feet of meeting room and ballroom space.

This expansion brings the total individual breakout spaces to 55, which includes the Crown Ballroom, 50 meeting rooms and the ability to divide the 35,000-square-foot ballroom into four 7,700-square-foot breakout spaces. The flexible meeting space related to the expansion will include two 10,000-square-foot spaces each divisible into 19 different configurations with seating capacities from 200-1,200 theater-style.

With more than 5,600 hotel rooms within walking distance of the Convention Center, in the compact convention district, you’ll find a hotel and meeting space to accommodate every request. And steps from Uptown’s arts and culture attractions, sports venues, nightlife hubs and 200-plus restaurants, a bustling cityscape sits on its doorstep. Start planning your Charlotte meeting today.



RECRUIT THE RIGHT BOARD



Research-based strategies
for good governance.

By Megan Toal
////////////////

Will Brown, PhD, and Mark Engle, DM, FASAE CAE, both work closely with nonprofit associations; the former as director of the Center for Nonprofits and Philanthropy at Texas A&M's Bush School of Government and Public Service, and the latter as a principal and board governance consultant at Association Management Center. Noticing that there were very few relevant and up-to-date resources for boards to use, Brown and Engle conducted research for the ASAE Foundation on boards with a full spectrum of competencies. Their research and observations from working with boards pointed to the same conclusion: While high-performing boards shared certain common characteristics, struggling organizations usually did not have optimized boards or a clear sense of strategic direction. As a result, Brown and Engle created "Recruit the Right Board: Proven Processes for

Selecting Critical Competencies” as a resource for current and aspiring association board members. In turn, they are shaping the landscape of board orientation and capability.

In this interview, Brown and Engle provide insights into their research, processes and the essentiality of “Recruit the Right Board.” As many decisions are made in the board room, processes are often stunted or bad decisions are made due to poor practices such as a lack of trust, dominating conversations and voting in favor of doing things as they have always been done. Through their research and in offering “Recruit the Right Board” as a guide, Brown and Engle disrupt and redirect unhealthy cycles in the board room to get boards on the right track and encourage competent board nominations to ensure that association processes and decisions are cultivated by the right hands.

FORUM: In “Recruit the Right Board,” you focus on/discuss exemplary boards that are models for others, and boards that need optimization that you use for your case studies. How did you choose the boards for your study?

Brown: There were several processes for selecting the associations to work with. Mark has a lot of relationships with people who he knew needed help in recruitment selection. He has observed and identified which boards are outstanding. The main question we asked ourselves was, “Are these boards exemplary?”

We wanted a variety of boards as our samples: trade, health-care, national, international, regional and state-based associations. When it came down to it, we had two categories of these boards: the majority group of boards with comprehensive processes and the minority group who do unique things in that model.

Engle: We asked our network of lawyers and consultants to name some organizations that have advanced the makeup of their boards in significant ways. We then vetted the list through questionnaires and ultimately screening calls. The research team ensured we had a balance of trade and professional; state, national and international; various industry; and profession domains. The case studies were not qualified as high-performing. The quantitative analysis did use a marker to determine high-performing boards based on a set of responses to key board functions as identified by BoardSource prior research.

FORUM: What are the characteristics of some of the exemplary boards that you highlight in “Recruit the Right Board” as case studies?

Engle: The boards we found to be instrumental in our research had common trends of transparency, diversity,

cultivation, anticipatory behavior and identifying core competencies. While facing board election and re-election cycles, these associations would look at their strategic plan, identify which competencies already existed on the board to help achieve the strategic plan and then actively seek out nominees to fill the gaps. Then the associations would communicate which core competencies were required for the board selection process, helping minimize the potential for incompetent candidates as well as empowering more competent candidates to apply. The associations would also ascertain that the process was transparent, not nebulous, and would seek out more diversity in the nominees to account for desired competencies as well as assure a more accurate representation of the association members. Finally, the associations had a leadership development committee that would recruit, develop and orient leaders, as well as create succession plans. These boards focus on both the current and future needs of their associations.

FORUM: “Recruit the Right Board” builds on your previous groundbreaking ASAE Foundation governance research. What makes the research groundbreaking?

Engle: One fundamental shift we outline is the shift to noncompetitive elections for leadership and why. As associations compete in a new environment, the old methodology for selecting leadership may not serve the organization well for the future. AMC Consulting Services does considerable work with medical and legal associations. The competition for members and attendees in medical societies and bar associations has increased from private enterprise, institutions and other nonprofit organizations. No longer do these associations “own the field” for education and community.

The skillsets we need in the board room to advance programming and initiatives for the field today are very different than they were 5 and 10 years ago. Both the case studies and the samples are particularly valuable in the book.

FORUM: Can you elaborate further on why board effectiveness is so important? What downsides do you see of ineffective boards?

Brown: Board effectiveness is important because the functions of governance (oversight, strategy and support) facilitate or inhibit an executive’s ability to operate the association. Providing good insight and guidance for the future of an association is incredibly valuable for managers. Similarly, facilitating healthy external relationships can mitigate barriers that executives might confront. The legitimacy of board members can be quite influential among key stakeholders, and the process of getting good people only builds that legitimacy and informs the decisions that they make.

12 SIGNIFICANT AND EMPIRICAL COMPETENCIES IN BOARD MEMBERS:

- > Team Oriented
- > Communicative
- > Relational
- > Influential
- > Reputable
- > Strategic



- Innovative <
- Committed <
- High Integrity <
- Capacity to Grow <
- Knowledgeable <
- Experienced <

FORUM: Why is this research necessary for association professionals? Rather, what information void does it fill?

Brown: Having a good group of people who can serve, govern and fulfill those responsibilities and functions, irrespective of your industry, makes a difference for how these organizations work. It's about having the right people in the room to make decisions and facilitate a process to guide the organization on a strategic level, and this idea of stewardship and leadership at the board level is particularly pressing in associations and everywhere. If we don't have these people, it can create a number of issues and challenges. Before this study, we hadn't articulated the procedures and operations of how you build this stuff out. In this space, in this topic, this is the first taxonomy of its kind, and so it has a high value proposition.

FORUM: If an association's board is not performing well, where is the first place they should start?

Engle: They should consider a board self-assessment to identify where they are not performing well and use the evaluation matrix in the book to determine if they have the right competencies and experience/demographics represented in the room to advance decision making for the organization.


FORUM: If you had to choose one key takeaway from this book, what would it be?

Engle: My one takeaway is that there is so much you can do to optimize your organization when you answer these questions: Can your organization make decisions as fast as the marketplace or profession in which you serve? Is your board made up of individuals capable of advancing key decisions in a timely manner that balances opportunity with risk?

FORUM: What are your predictions for the future of board governance, based on your research?

Brown: I honestly don't see much shift in the way organizations think about governance. Boards are inherently a risk-averse

structure (see Joern Hoppmann's article "Boards as a Source of Inertia" in the Academy of Management Journal 62(2): 437–468). The boards tend not to be open to shifts in structures, and structures are fairly homogeneous. Boards in one organization act and are structured a lot like boards in other organizations. Don't get me wrong, there are variations in every group of board members. Each have their own nuances and organizations have unique histories. Furthermore, we (experts) often give advice that seeks conformity and alignment with "best" practices. Most board members are unwilling to accept major structural changes or modifications. So, what is my prediction? More of the same, well-intentioned individuals trying to make sense of complex opportunities and challenges with limited time and often limited information.

Engle: Our research also supports Will's comment. A big concern we are seeing is boards' lack of capacity to change their decision-making model in order to operate in a heavily competitive market. Outdated governance models do not support the capability to make real-time decisions to take advantage of market opportunities and respond to threats in an appropriate window of time. Many models value "structure over substance," seek broad input to inform decisions, and seek tight or small bodies to make decisions. 

WILL BROWN, PHD, IS A PROFESSOR AT THE BUSH SCHOOL OF GOVERNMENT AND PUBLIC SERVICE AT TEXAS A&M UNIVERSITY. READ MORE ABOUT BROWN HERE: BUSH.TAMU.EDU/FACULTY/WBROWN.

MARK ENGLE, DM, CAE, FASAE, IS A PRINCIPAL AT AMC WHO SPECIALIZES IN BOARD GOVERNANCE AND RECRUITMENT. READ MORE ABOUT ENGLE HERE: CONNECT2AMC.COM/OUR-EXPERTS/MARK-ENGLE.

MEGAN TOAL IS A CONTENT MARKETING ASSOCIATE FOR ASSOCIATION MANAGEMENT CENTER BASED IN CHICAGO. SHE CAN BE REACHED AT 847.375.4772 OR MTOAL@CONNECT2AMC.COM.



*More than enough
column-free space*

NOW THAT'S AN EDGE

Whatever your vision, you'll find the perfect space for it in Chicago Northwest. From amenity-rich meeting rooms to the 100,000 square foot Schaumburg Convention Center, which can handle the most elaborate trade show displays. Accessible. Affordable. Remarkably enjoyable. And so close to O'Hare and downtown Chicago.

Give yourself an edge at ChicagoNorthwest.com.



Over 1,000 Daily Direct Flights | 10,000 Hotel Rooms | Over 400 Restaurants

enjoy
illinois

Speak Easy

CONQUER YOUR FEARS AND NAIL YOUR
NEXT SPEECH OR PRESENTATION.

BY AMY THOMASSON

Image: Cecillie_Arcurs/iStock Collection via Getty Images



While public speaking may not have the dubious distinction of being the most common fear, it still ranked highly enough on Chapman University's annual "Survey of American Fears" to beat out kidnapping, zombies and even the prospect of an apocalypse. However, unlike battling a horde of zombies, delivering a speech or presentation is a challenge you have likely faced and will continue to encounter throughout your career. As association management professionals, we must also address unique demands of not only conquering our public speaking fears, but conveying compelling stories that move our members, volunteers and staff teams to action. Luckily, there are simple steps you can take to move from a novice to a polished speaker, effectively tailor your story to your audience and appropriately address feedback. Your peers are here to tell you how.

Getting Started as a Novice Speaker

1. Nerves are normal.

According to Mark Twain, "There are two types of speakers: those who get nervous and those who are liars." Anyone who has had the privilege of meeting the indomitable Jacqueline Price Osafo, membership and development director, Water Quality Association, would be surprised to find that nerves are still part of her pre-presentation equation. Yet she has learned to harness that energy productively. Price Osafo says, "The key is getting some of the nervous energy out of your body prior to stepping in front of an audience. I am obsessed with the Wonder Woman pose for confidence. One must stand in the Wonder Woman—or for men, Superman—pose for five minutes. The purpose of the pose is to increase your self-confidence. I learned about this pose in Shonda Rhimes' 'Year of Yes' and Amy Cuddy's TED Talk, 'Your Language Shapes Who You Are.' My second act of preparation is to exercise my mouth and body by singing one of my favorite tunes or dancing it out to a favorite song."

2. Observe and apply your learnings.

Scott Oser, President, Scott Oser Associates, partners with associations to deliver customized solutions and strategic expertise. This line of work has resulted in exposure to countless speakers, presenters and facilitators, enabling him to learn by watching others. "I have watched speakers within

“I always try to learn as much as I can about who the audience is and tailor my focus accordingly.”

SCOTT OSER, PRESIDENT, SCOTT OSER ASSOCIATES

the association space and outside of our space to see what they do well and what I can incorporate into my presentations,” he says. While observing and learning from the successes and stumbles of other speakers is important, Oser also emphasizes making your presentations your own. “Be confident and make sure you have your own presentation style. Audiences can sense when speakers are unsure of themselves. Speakers get selected based on their knowledge and experience, so let that shine through.”

3. Prepare to go off script.

Jon Kinsella, senior marketing strategy manager, Association Headquarters, has also spent his career serving an array of association clients. The needs of his clients are as varied as the members they serve, which has afforded Kinsella the opportunity to speak at annual meetings, deliver online educational programs and more. Since he functions as a representative of the organization he is serving, Kinsella has learned that advance preparation is critical to success. “Confidence comes from preparation. Being a subject-matter expert on digital marketing has given me the confidence to pivot off my script and venture into spontaneous streams of consciousness that have produced some of my most compelling content,” Kinsella says. “The level of presence that confidence produces helps me get out of my head and pay attention to my audience. From there, I can key in on what they are responding to and what isn’t hitting home, which helps determine what to expand upon and what to quickly glide over.”

Once you’ve moved from nervous novice to comfortable communicator, you’ll next want to tackle adjusting your presentation based on your audience.

Personalizing Your Message and Delivery Style for Your Audience

1. Understand the organization.

Oser says, “I always try to learn as much as I can about who the audience is and tailor my focus accordingly. When it comes to association audiences, there are many things that can be

triggers for changes in my message, but a few key ones are individual membership versus trade associations, level of experience and size of the organization. Based on that information, I will go more strategic versus tactical, as well as tweaking my talking points to be applicable to a larger portion of the total audience.”

2. Know who is in the audience.

“If possible, I ask for a registration list ahead of time. I look at registrants’ titles and associations. I often visit participants’ websites to evaluate services related to the presentation. For those times when this information is not available, I try to have an in-depth conversation with the event organizer. I also take a quick poll related to the topic of discussion, experience level and association tenure,” says Price Osafo. This polling methodology can be especially useful when presenting to a new audience, such as when she recently presented to her first international audience at the African Society of Association Executives (AfSAE).

3. Make your content applicable and actionable.

“In a field that changes as quickly as digital marketing does, theoretical knowledge must be supported by practical use of action plans. This is always top of mind when I prepare for a speaking engagement, whether the audience is small business owners or association executives,” Kinsella explains. “Context is just as important as content. Each audience has different pain points and challenges, so I make a point to provide real-world, tactical case studies specific to their day-to-day that complement the overarching theory or strategy.”

Finally, a good presenter knows that a presentation isn’t a one-way communication. Your audience is constantly communicating with you, and there are some quick ways to understand what they’re saying and make simple adjustments to reflect their needs.

Recognizing and Responding to Audience Feedback

1. Pay attention to nonverbal cues.

“I pay attention to facial expressions: A confused look translates to the need to adjust my explanation.

The body language of your audience may be an indication of boredom. This is a great opportunity to get the audience engaged and/or add humor to presentation. Sometimes, I will call myself out and say, 'I'm not capturing your attention,' which serves as a cue to reengage. Audience engagement is key," says Price Osafo.


2. Ask questions before the presentation.


"If I don't know who is going to be in the room before I arrive, I often begin my talk by asking a few questions about the audience or their organizations. If there is a large percentage of attendees from a particular segment or category, I will tweak my presentation points if possible," Oser says.

3. Wrap up with more questions and answers.

Kinsella says, "Audience feedback and Q&As are always encouraged because they provide insight into what topics I need to dive deeper on and

what isn't working. They also provide me with ideas for future topics and spin-off presentations, which helps me constantly alter and enhance my offerings."

Although speaking up in the form of a speech or presentation may not be your preferred work or volunteer assignment, with practice and these tips, you can make the experience more pleasant and effective. At minimum, it'll be less intimidating than a vampire, active volcano or shark-infested waters. If all else fails, I'll leave you with my personal mantra whenever my pre-speech discomfort is setting in: "This is what growth feels like." 

 **FURTHER TRAINING ONLINE** Visit the Association Forum Speaker Resource Center at associationforum.org/browse/speaker-resource-center to get additional advice on how to keep your audience engaged.

AMY THOMASSON
IS THE MARKETING
DIRECTOR AT THE
CONGRESS OF
NEUROLOGICAL
SURGEONS.

Customized Board and Governance Solutions

Sustainability and growth begin with a strong foundation. Partner with AMC Consulting Services to achieve operational excellence with

- Governance Assessments
- High-Performing Boards™
- Board Orientation/Role and Responsibilities
- Board Composition and Selection
- Strategic Planning

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





Holiday Showcase Welcoming Environment®

ASSOCIATION FORUM CREATED A WELCOMING ENVIRONMENT® AT HOLIDAY SHOWCASE 2019, AND LOOKS AHEAD TO MORE DIVERSITY AND INCLUSION IN THE COMING YEAR.

BY KIM KELLY, CAE

"For me, Welcoming Environment® means you can be where you are without fear of meeting bias; you are evaluated on what you can control—like effort and mindset—and not what makes you, you."

This is how Tyler Eble, vice president at Association Development Solutions, began the Welcoming Environment® Roundtable session at Holiday Showcase 2019. The roundtable session was



Members listen to speakers and participate in discussions at last year's Holiday Showcase in December.

just one of many Welcoming Environment® initiatives at this year's event. From a special registration area for first-time attendees, to a ribbon wall that included pronouns and self-expressive adjectives, the event put inclusion at the forefront.

Back at the roundtable session, professionals from various associations discussed topics relating to leadership and communication, member and attendee engagement, and psychological safety. Several attendees noted that their association leadership and boards have created committees to address diversity and inclusion, but that the work has been stagnant. It seems that most associations want to create a Welcoming Environment®, but few know where to start.

If your organization is struggling to make formal strides toward inclusion, look at Association Forum's Welcoming Environment® Resource Kit (associationforum.org/welcomingenvironment). The

kit includes definitions of a Welcoming Environment®, best practices and real examples of inclusive work environments in the association profession.

Nicole Blankenship, MBA, CAE, is the director of chapter and district relations for the American Academy of Pediatrics (AAP). She attended the Welcoming Environment® Roundtable at Holiday Showcase looking for ideas to strengthen the work that the AAP is doing in this area.

The AAP Board of Directors formed the Board Committee on Equity in October 2019. This committee is charged with overseeing the implementation of recommendations from the Diversity and Inclusion Task Force and the Bias and Discrimination Task Force. "The AAP feels it is important to look at the root causes of health disparities, including educational inequities, poverty, adverse childhood experiences, food insecurity, racism, lack of access to quality health care, social determinants of health and environmental threats," Blankenship says in an email.

She also notes that the AAP plans to address equity in education, policy, advocacy, research and clinical practice support, and will implement recommendations at every level of the organization. "We recently introduced new policies on racism and immigration to help advance these efforts," Blankenship writes.

The efforts put in place by the AAP echo something discussed at Holiday Showcase—a Welcoming Environment® has to come from an organization's board and be intentionally integrated into every aspect of the organization.

“We recently introduced new policies on racism and immigration to help advance [equity] efforts.”

NICOLE BLANKENSHIP, MBA, CAE, DIRECTOR OF CHAPTER AND DISTRICT RELATIONS, AMERICAN ACADEMY OF PEDIATRICS

The Association Forum strives to be a leader in creating a Welcoming Environment® in order to guide its member organizations. On April 13–14, 2020, Association Forum will host the National Summit on Welcoming Environment® in Chicago. The event will bring association professionals together to explore how to take Welcoming Environment® initiatives from strategy into action. 📍

/// To find out more about creating a **WELCOMING ENVIRONMENT®** or to register for the National Summit on Welcoming Environment®, visit associationforum.org.

My Sutherland Scholarship Year at Association Forum

BY EMILY THOMPSON



Last year was a good year for me. 2019 was sprinkled with special moments, like marrying my best friend, and lifelong lessons in areas like cultivating my career power and learning how to balance it all. While getting married takes the cake for 2019, it was closely followed by being awarded the Association Forum's Bree Anne Sutherland Scholarship.

Winning this scholarship gave me the confidence boost I needed to step out of my comfort zone in my professional life and take control. I thank my lucky stars that I applied for the scholarship and aligned myself with the support system

that is the Association Forum and the nonprofit and event community.

To provide a little background about me, I have a degree in theatre and hail from a tiny town in the Northwest corner of Illinois. Back in college, I imagined a bohemian life of instability throughout my 20s. I moved to Chicago to take auditions and join the happening comedy scene. After a couple of comedy classes and failed auditions, real-life responsibilities made their way to the front of my mind: living expenses, student loans, health insurance, and did I say student loans?

I was waiting tables in Wicker Park and wanted to forge a career path but didn't know which way to go or how to break into any type of corporate work. So when I was presented with an amazing opportunity to work for the American Epilepsy Society (AES) as a temporary employee, and then as a full-time employee, I jumped at the chance.

I knew this was the opportunity I was waiting for! I'd like to give sincere thanks to my strong mentors and leaders at the American Epilepsy Society who took a chance on me, a young temp who wanted to do a great job. I had no association experience, but a full résumé of retail and service industry work. Little did I know that this was the start of me finding solid ground.

My organization was proactive in providing me a baseline of what the association industry was all about. AES registered me for Association 101, which was my first event at the Association Forum. This all-day session gave an in-depth look at the multifaceted nonprofit sector and how it was flourishing in Chicago. I fondly remember the welcoming environment that was created with our facilitators and the Association Forum staff. After that, I excitedly signed up for my first Holiday Showcase in 2017 and

“Throughout the year, Association Forum and this scholarship have been my constant reminder that I am worthy of what I want to pursue, and that I can achieve what I put my mind to!”

knew that the Association Forum was a place where anyone would feel welcomed and supported.

I thought about applying to the Bree Anne Sutherland Scholarship for a couple years, but couldn't quite figure out how to navigate the application process. How could I stand out in a sea of applicants?


For me, it was intimidating, since I never felt worthy of awards or scholarships. So when I was notified that I won the Bree Anne Sutherland Scholarship, I was completely shocked, but ultimately proud.

I feel strong and wise with the experience I've gained thus far in my career. I've always been easygoing, but that has also kept me from pushing for what I want at times. This award allows me to see that I don't have to go with the flow. I can actually set up a trajectory for my career and achieve goals I never thought imaginable, like winning a scholarship. I don't have to settle, but rather I can plan and move forward with a path of my own choosing.

As soon as I was able, I started to research all the education sessions and webinars that the Association Forum had to offer. Going into this year, I wanted to educate myself in every way possible by investigating types of education that would best equip me for my professional goals and future. For example, I took Association Management Essentials: Finance for the Non-Finance Professional, since I help establish budgets for the events I plan. Going to many different sessions, I always feel that wonderful welcoming sensation as I arrive at the elevators for the ride up to the 8th floor. I usually connect with another Association Forum member before I hit the front door and am always greeted with a smile from the staff. I always feel at my best showing up to Association Forum events, and when I leave, I'm inspired and

invigorated with new outlooks and skill sets to take back to my job.

Another invaluable facet of the Bree Anne Sutherland Scholarship was a wonderful mentorship opportunity. I was honored to have the Immediate Past Chair of the Association Forum Board of Directors as my mentor. Lynne Thomas Gordon, MBA, RHIA, CAE, FACHE, FAHIMA, CEO of the American Association of Orthodontists, kindly gave me her time, effort and care throughout the year. The knowledge she so freely passed to me has already proven to be indispensable—from helping me navigate what it means to have a cultivated brand in the ever-evolving professional landscape, to teaching me how to create opportunities and support systems at every stage of my career. I'm forever grateful for all the hours of laughter, wisdom and kindness she has given me. The valuable connection with Lynne will last a lifetime! Many thanks to Lynne for being such an incredible mentor and friend.

Throughout the year, Association Forum and this scholarship have been a constant reminder that I am worthy of what I want to pursue and that I can achieve what I put my mind to! Winning this scholarship has challenged me to apply for more opportunities. I was also awarded a membership grant for the MPI Chicago Area Chapter this year and am honored to be on their Education Content Committee. I am now more active than ever in Association Forum and other professional associations. I am loving the volunteer work, meeting new people, learning and creating lasting connections. When I look back on my journey and professional path, I'll look at this scholarship as a turning point. I urge anyone who is thinking about applying for that next thing, whether it's a scholarship or award, or wanting to take a leap, to just do it. You won't regret it, and you have no idea where it might lead. 

EMILY THOMPSON IS THE EVENTS COORDINATOR FOR THE AMERICAN EPILEPSY SOCIETY.

Leading by Example

FORUM MAGAZINE REMEMBERS THE CONTRIBUTIONS OF JOHN GRAHAM IV, AN INSPIRATION TO MANY.

John Graham IV, FASAE, CAE, former President and CEO of ASAE, was a mainstay in the association world for more than 40 years. His recent passing, after an extended battle with cancer, has saddened the greater association management community.

Graham joined ASAE in August 2003. In his time with the organization, he oversaw incredible growth, more than doubling ASAE's membership, along with leading the charge on a variety of innovative and progressive initiatives that would position ASAE as a true leader in the industry.

Prior to his tenure with ASAE, Graham was part of the American Diabetes Association (ADA) for 24 years, serving as their CEO for the last 13 of those. He also worked for the Boy Scouts of America for nine years before joining ADA. In May 2015, he was honored and recognized as a Distinguished Eagle Scout for his contributions to the organization.

A True Advocate

Graham's résumé only scratches the surface of his contributions and dedication to the industry. His passion for his initiatives helped define his goals for the community: bringing people from all backgrounds together and showing the world why associations are so important to society.

Most notably, Graham invested heavily in ASAE's Diversity Executive Leadership Program (DELP). The mission of this program is to support individuals from underrepresented identity groups in their advancement into the ranks of association management leadership. The two-year program has many goals, most notably:

- To provide individuals from identified underrepresented groups in the association community (people of color, those in the LGBTQ+ community, people with disabilities) with support, access and opportunities for leadership.
- To provide the association community with increased access to a diverse pool of talented leaders.

Graham spent years growing the program, according to Pat Blake, FASAE, CAE, CEO, Heart Rhythm Society. She remembers his work with DELP as influential. "The program was near and dear to John's heart," she says. "Every initiative needs a champion who is passionate about its success and



longevity. The DELP program embodies diversity, equity and inclusion, and John's efforts certainly contributed to its continued success."

Michelle Mason, FASAE, CAE, President and CEO, Association Forum, echoes these sentiments, saying Graham's work provided opportunities for those who were ignored previously. "The DELP program has set the stage for so many professionals to go on to achieve and accomplish their goals in the industry, many of which would not have been realized if not for the work of John. He knew this, and today we are dedicated to creating a welcoming environment for every association professional."

Graham's intense focus on diversity and inclusion was key to the sentiment picking up steam in the association world. "You can't take your eye off the ball," Blake adds. "John knew that, and that's why I think he'll always be remembered for his efforts to make association management accessible for all."

Graham was also invested in the expansion of associations both nationally and internationally. "He believed that associations touch so much of the fabric of society," Mason says. One prime example is his Associations Advance America campaign, which later evolved into The Power of A initiative that we see today. The message was simple yet extremely important: Associations help advance workers' skills and create new employment opportunities, in turn making America and its economy stronger.

His advocacy of associations across many channels, including legislatively, provided a launchpad for the industry to become recognized as a valued contributor to the economy and workforce.

"John believed that the association profession made a difference," Blake says. "Both nationally and internationally, he thought that because associations exist and because of the work we do, the world was a better place."

Positive Influence

Throughout his career, many association professionals credit Graham with impacting both their professional and personal lives. For Mason, meeting Graham changed the trajectory of her career. “When I first met John, I was on staff with ASAE as an associate manager of research. Having the exposure to a leader like John so early on in my career was really a milestone moment for me,” she says. “He was very professional, engaging, smart and definitely passionate about his work in the nonprofit sector.”

For Mason and many others, Graham was an influential mentor, helping shape the minds and careers of countless association professionals. Paul Pomerantz, FACHE, FASAE, CEO, American Society of Anesthesiologists, notes that Graham helped him start his second career in the association management world. “I was at my first association job and was trying to figure out which way was up,” he says, “and he was incredibly warm and friendly. As the new guy in the industry, I was nervous. But he made me feel right at home.”

Blake says that she didn’t ask for much advice from Graham over the years, but there came a point when she began to think about a scenery shift in the industry. “The first person I called was John,” she says, “and I told him I didn’t even know where to begin. He told me to start ‘putting a bug’ in a couple of well-placed people’s ears. Before I knew it, John had already done that for me, reaching out and helping me get the interview for the position I still hold today.”

Not only was Graham’s extensive network impressive, but his personality was contagious and set him apart from others in the field. “He had an engaging sense of humor and a very distinctive laugh,” Pomerantz continues. “He was so concise and articulate. When he conceptualized an idea, he delivered it crisply, where you learned something from virtually everything he said.”



John Graham IV with colleagues at Holiday Showcase 2017.



Lasting Memories

With the passing of such an influential figure, it’s important to not let the personal, more intimate memories fade.

For Pomerantz, one lasting memory he has of Graham is the post-meeting or event extracurriculars, usually involving long and deep discussions over a few drinks at a bar. “He would always have the ‘John Table,’” he remembers. “But it wasn’t an exclusive table at all. Whoever was at that meeting or event was welcome.”

More and more chairs would be added to the table, sometimes growing to as many as 20 attendees, all gathered around Graham, listening to his advice and striking up conversations about the intricacies of the industry. “He would always have his signature drink, a glass of Johnny Walker Red scotch—what I would call beginner’s scotch,” Pomerantz jokes. “He was usually the last one there, closing down the bar. But he’d always show up in the morning for the next session as sharp as a tack.”

Graham’s kindness stretched beyond the professional world, as Blake recalls. “My husband was diagnosed with cancer,” Blake says, “and the first question John would ask me every time he would see me was, ‘How is your husband doing?’ That meant a lot to me. Of all the people that John knows, all the issues he hears about and all the personal information he gets told, he never forgot to ask. John always cared.”

For Mason, the experiences she shared with Graham would never leave her. “We had moments where we were communicating as mentor-mentee, but we also had interactions where we were competing in the same market,” she remembers. “I came out of those conversations much stronger as a result. Even in the moments when things were more tense, he was always teaching me how to be a better leader.”

Graham was one of the true giants in the association management world. The memory of Graham will be a lasting one for all who spent time with him, and his influence will continue to impact professionals and the industry for years to come. **E**

“Having the exposure to a leader like John so early on in my career was really a milestone moment for me.”

MICHELLE MASON, PRESIDENT AND CEO, ASSOCIATION FORUM

CONTRIBUTIONS may be made in Graham’s memory to organizations that were particularly important to him, including:

- The National Capital Area Council, Boy Scouts of America, ncacbsa.org/grahammemory
- The Cradle of Liberty Council, Boy Scouts of America, donations.scouting.org/#/council/525/appeal/1676
- VCS Cancer Foundation, VCS CancerFoundation.org

Remembering a Legend

THE ASSOCIATION COMMUNITY MOURNS THE PASSING OF RODERICK GEER, A RENOWNED EXPERT IN HIS FIELD.

Past ASAE and Association Forum Chair Roderick L. Geer, CAE, passed away peacefully on Jan. 20 at the age of 92 after a long battle with Alzheimer's. He had a long-tenured career, with his most recent association CEO position at the Million Dollar Round Table in Chicago from 1971–1991. He was also President of the Chicago Society of Association Executives (CSAE), now Association Forum, in 1981–82.

Geer was an inspiration to many in the association management world, maybe none more so than Chris Mahaffey, MS, CAE, FASAE, Executive Director, American College of Foot and Ankle Surgeons. Mahaffey considered Geer his “mentor and second father.”

“I first met Rod Geer in 1980 when he was on the Search Committee that hired me as the CSAE Executive Director, and he became my second boss as Board Chair in 1981,” Mahaffey says. “Right out of the box, his professional guidance was amazing. I’d never experienced such support before.”


Known in the industry as dedicated and selfless, Geer won several awards for his work in association management. In 1983, he won the Association Forum John C. Thiel Distinguished Service Award. The honor is bestowed on unsung heroes in the field—behind-the-scenes volunteers who have a long-

term, multifaceted volunteer record with the Association Forum.

Geer was also known for his expertise in the field,

providing advice to those who sought it out. “He was the consummate association executive: positive, confident and supportive,” Mahaffey says.

He was also a passionate Cubs fan; he had season tickets and always took colleagues to games. “He would invite two other CSAE’ers and myself to the games. We became known as the Wrigley Spirits,” Mahaffey jokes. Celebrations wouldn’t end with the last pitch, however, as he would always head to his favorite bar, Bierstube on Irving Park, for a few after-innings drinks.

But most importantly, Geer will always be remembered as influential to all he spent time with. “He mentored dozens of young executives, me included. Like Rod, I know they are all paying it forward to their own mentees,” Mahaffey says. “He was the consummate role model for young association CEOs.” 



AD INDEX

COMPREHENSIVE LIST OF ADVERTISERS

Association Forum	associationforum.org	15, 47
Association Management Center	connect2amc.com	31
Boston Convention Marketing Center	signatureboston.com	3
Chicago's First Lady Cruises	cruisechicago.com	45
Choose Chicago	choosechicago.com	back cover
Cook and Kocher Insurance	cookandkocher.com	10
eShow	goeshow.com	inside back cover
GLC	glcdelivers.com	17
Louisville CVB	gotolouisville.com	21
MEET Chicago Northwest	chicagonorthwest.com	27
Visit Aurora	visitaaurora.com	inside front cover
Visit Charlotte	charlottesgotalot.com	22–23
Visit Phoenix	visitphoenix.com	43

PARTNERS MAKE IT POSSIBLE

Chicago's First Lady Cruises

Melanie Mapes

112 East Wacker Drive
Chicago, IL 60601
847-358-1330

CruiseChicago.com

Dazzle your guests with a fabulous private yacht, party amongst Chicago's glittering skyscrapers and take in skyline views along the spectacular lakefront. Seven luxury vessels accommodate groups of two to 250 and offer best-in-class service with attentive and experienced captains and crew. Enjoy endless city views aboard expansive, open-air rooftops, and relax in the comfortable, climate-controlled salon with warm mahogany and brass tone finishes and large picture windows. Choose to cruise your way with a cruise on the river, lake—or both! As the only party aboard your yacht, you have full control of your event.

Select from six diverse caterers to suit your taste and a variety of bar packages with available upgrades. Add an award-winning architecture guide for a partial tour commentary as part of your cruise and delight your guests with fascinating tales of the sites they will see along the way. Summer fireworks over Lake Michigan on Wednesday and Saturday evenings culminate in the ultimate "wow" for guests.

Whether you're planning a private corporate event, celebrating a milestone or seeking the ultimate venue to experience Chicago's epic skyline with your guests, an event aboard Chicago's First Lady Cruises is sure to make waves. For reservations or inquiries, call 847-358-1330 or visit **CruiseChicago.com**.



Choose Chicago

Dawn Young

301 East Cermak Road
Chicago, IL 60616
dyoung@choosechicago.com

ChooseChicago.com



Chicago is a city unlike any other. We've got the architectural marvels, world-class museums, dynamic entertainment and award-winning dining scene you'd expect from one of the world's greatest cities. But we're more than just another big city—our welcoming residents, inclusive neighborhoods and Midwestern soul truly make Chicago the city that feels like home.

Looking for the ultimate wow factor? You'll find it in Chicago. Conferences, conventions, meetings and special events find their home in Chicago, whether at McCormick Place, the Western Hemisphere's largest convention center; historic Navy Pier, with its stunning lakeside venues; or one-of-a-kind, only-in-Chicago spaces that fill attendees with awe.

Welcome to soaring views from one of the world's tallest buildings, lectures among ancient artifacts, meeting rooms with stunning waterfront vistas—the possibilities are simply endless, and all within a city renowned for its award-winning restaurants, pro sports teams, outdoor recreation, iconic architecture, jaw-dropping attractions and innovative hotels.

Whether you're planning an intimate meeting for 10 or a large-scale event for 50,000, Choose Chicago's experienced Sales and Client Services teams are your one-stop resource for advanced meeting planning, provided to you at no extra cost at all. We'll assist you in finding the right hotels and venues, speakers, entertainers, transportation services, decor companies, caterers and more.

eShow

Michael Horton

Vice President, Sales

5 Executive Court
South Barrington, IL 60010
847-620-4218

Mike.horton@goeshow.com

goeshow.com



No matter the size, need or location of your event eShow has the services "Under One Umbrella."

Formed in 1996, eShow started out as a custom website provider. It was soon after that an event management company came calling. Once they had experienced the eShow product and the flexibility it provided, requests for additional custom products such as registration and exhibitor management solutions followed. From there, eShow continued to learn more about the demands of the event industry to bring us to today where we provide services for every level of an event.

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 the 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.

GLC — a marketing communications agency

Joe Stella

Vice President Business Development

9855 Woods Drive, Suite 105

Skokie, Illinois 60077

847-205-3127

jstella@glcdelivers.com

glcdelivers.com/associations



At GLC, we believe that every brand has a story to tell. At the heart of these stories are people: amazing people who do ordinary things or ordinary people who do amazing things. Whether rooted in thought leadership, best practices or human interest, content has the power to connect, to inspire and to move audiences through positive change and growth both personally and professionally. Through traditional media and innovative new channels, our content programs connect brands to people, driving strategic outcomes and reinforcing the relational value between the two. That's why we do what we do.

What we do

GLC provides turnkey media, marketing and communications services to professional and trade associations. We utilize award-winning design and compelling thought leadership content to attract and engage member audiences. Our approach is informed by data and analytics, as well as our extensive experience in the association marketplace.

GLC's approach is media-agnostic and designed around specific business goals and objectives. Our focus is and always has been to use the power of design and storytelling to develop best-in-class media platforms—whether in print, digital, social or video—that deliver measurable results for our clients. Our process is innovative, collaborative and flexible, while our project management and attention to detail is highly regarded by our 30 association client partners.

While much in the world and our industry has changed, our passion has remained consistent: to help organizations tell stories that empower their audiences. For more than 50 years, this is what has set us apart from our competitors.

Louisville Tourism

David Kinney

Director of Midwest Sales

401 West Main Street, Suite 2300

Louisville, KY 40202

502-379-6105

dkinney@gotolouisville.com

GoToLouisville.com



Louisville has steadily become one of the hottest travel destinations in the U.S. From its booming bourbon renaissance, to its culinary jewels, to its iconic events and attractions, the city offers a menu of things to see and do all wrapped within its

hallmark Southern charm. Not to mention, Louisville has been revitalized with a \$1 billion investment in tourism infrastructure, at the heart of which is the expanded and renovated Kentucky International Convention Center that opened in 2018, accompanied by new hotel development and new Urban Bourbon experiences. It's no wonder Smart Meetings named it one of "11 Cities on the Rise You Can't Pass Up."

Visit Aurora

Justin Clark

15151 East Alameda Parkway, Suite 5200

Aurora, Colorado 80012

720-484-8902

justinclark@visitaaurora.com

visitaaurora.com



Aurora, Colorado, is your Gateway to the Rockies. With more than 65 hotel properties, 13,000+ guest rooms and 1 million sq. ft. of meeting space—explore Colorado's third-largest city. This growing destination artfully melds capacity and an ideal location near Denver International Airport and the Rocky Mountains with plentiful areas to get outdoors, award-winning chefs, craft breweries and a wide range of activities. Discover Colorado's largest resort and convention center, Gaylord Rockies Resort & Convention Center, complete with eight dining locations, a full-service salon and spa, indoor pool, and 517,000+ sq. ft. of meeting space accompanied by showstopping seasonal events. Or dine around the globe without ever leaving city limits at one of the 250+ unique ethnic eateries showcasing food from Korea, Japan, Ethiopia, El Salvador, Italy and more. Dive into the scene, the food and shopping at Colorado's largest aviation factory turned indoor marketplace, Stanley Marketplace, or spend an afternoon at Southlands to get a taste of a modern main street feel. With a Rocky Mountain backdrop, wander the foothills at Cherry Creek State Park to capture a sense of Colorado adventure without being too far from city limits. Stop by Aurora's most-awarded brewery, Dry Dock Brewing Company, to enjoy a Colorado-crafted beverage that is bound to bring you back for more.



Image: rclassenlayouts/iStock Collection via Getty Images

Aurora is your premier destination for business, leisure and convention travel. Make us your basecamp for everything Colorado. For more information go to VisitAurora.com or call 720-484-8902.

Visit Charlotte

Donna Forbes

501 South College Street

Charlotte, NC 28202

704-334-2282

donna@whiteadv.com

charlottesgotalot.com



As the 16th largest city in the nation and third fastest-growing major U.S. city, Charlotte, North Carolina, should be at the top of any meeting planner's list. Thanks to smart development and progressive amenities, the Queen City continues to grow as the premier destination for meetings, conventions and trade shows.

As one of the top 10 busiest airports in the world, the Charlotte Douglas International Airport offers more than 170 nonstop flights to destinations worldwide, including to 40 international cities. Sixty percent of the country is within a two-hour flight of Charlotte, and more than 50% of the U.S. population can make it to the city in less than a day's drive by taking Interstates 77, 85 or 40.

The Charlotte Convention Center reigns supreme as a centrally located meeting hub. The 550,000-sq.-ft. facility has more than 280,000 square feet of exhibit space and 126,500 sq. ft. of meeting and ballroom space. The Convention Center's \$126.9 million expansion is officially underway—and slated for completion in summer 2021. The expansion will add more than 50,000 sq. ft. of meeting room and pre-function space, bringing total individual breakout spaces to 54 (up from 40).

With an increase in business and leisure travel each year, the hotel market in Charlotte is one of the most active in the country. With over 5,600 hotel rooms in Center City, and an additional 1,274 more rooms scheduled to open in Uptown through 2022, there's no better place to meet than in Charlotte.

Visit Phoenix

Michele Lawrie

Director of National Accounts

400 East Van Buren, Suite 600

Phoenix, Arizona 85004

312-216-8777

mlawrie@visitphoenix.com

visitphoenix.com/meetings



Phoenix makes meetings memorable. Hotels and resorts bask in near-perpetual sunshine. Jaw-dropping sunsets paint the desert sky on a nightly basis. And the Phoenix Convention Center sits in the middle of a walkable downtown that—thanks to an influx of entrepreneurs, visionaries, students and artists—is brimming with youthful energy and new investment.

Recently, more than \$5 billion has been pumped into a 1.7-sq.-mi. zone in the downtown core, including new restaurants, bars and breweries, venues and accommodations—which will total just under 4,000 hotel rooms by 2020. In addition, transformative renovations are underway at the Hyatt Regency Phoenix, Renaissance Phoenix Downtown Hotel and Sheraton Phoenix Downtown.

Inspired by the Grand Canyon, the Phoenix Convention Center's natural colors and textures mirror the surrounding desert and canyon landscapes, while incorporating energy-efficient design principles and ongoing sustainability programs.

The convention center is one of the nation's most acclaimed buildings of its kind, offering 900,000 sq. ft. of flexible space, plus 312,500 sq. ft. of continuous exhibit space connecting the North and West buildings, 99 breakout rooms and a 2,300-seat performance hall.

The campus is conveniently located just 4 miles from Phoenix Sky Harbor International Airport, where attendees can catch a ride on the Valley Metro Rail directly into downtown in about 15 minutes for a total cost of \$2.

For those seeking a uniquely Sonoran Desert experience, South Mountain Park and Preserve, Camelback Mountain and Piestewa Peak are Phoenix's most popular spots for snapping a saguaro selfie or capturing a brilliant sunset.



ASSOCIATION FORUM'S
PARTNERS
— *Make it* —
POSSIBLE



Image source: hyatt.com

Hyatt Centric Chicago Magnificent Mile Hotel Receives Prestigious Award

Chicago's **Hyatt Centric Chicago Magnificent Mile** hotel was awarded the prestigious Donald N. Pritzker Franchise Hotel Team of the Year Award. Criteria for the award include overall achievement in the financial success of the property, outstanding guest service experience, creation of a positive work environment and overall display of leadership qualities.

"As we wrap up 2019, extending my ongoing gratitude to the colleagues with whom I am privileged to work at Hyatt Centric Chicago Magnificent Mile—winners of the Donald N. Pritzker Franchise Hotel Team of the Year Award. I'm so proud of this group of hospitality professionals for all that they do to provide genuine care for our guests, each other and the community!" general manager Doug Dean writes in a LinkedIn post.

ISAE Names New Management Team to Lead Association

Pivot Management Professionals assumed management duties for the Illinois Society of Association Executives (ISAE) starting Jan. 1, 2020. ISAE serves more than 400 association members through educational programs, publications and member services. Headquartered in Springfield, Illinois, ISAE helps its members develop professionally while promoting association work to the public.

Pivot Management Professionals leader Sara Decatoire, CAE, IOM, is the newly appointed Executive Director. "Pivot Management Professionals is honored to have been selected to represent ISAE," says Decatoire. "Having served as volunteer leaders for ISAE in the past, we are excited to take on this new role as staff and look forward to the opportunity to collaborate with our friends and colleagues. Working directly with ISAE members will offer us an excellent opportunity to provide value based on individual and organizational needs."



ALA Announces New Executive Director


On Feb. 24, 2020, **Tracie Hall** became the American Library Association's (ALA) new Executive Director. Hall succeeds Mary Ghikas, who has worked for ALA since 1995 and had been Executive Director since 2018.

Hall returns to the ALA where she served as director of the Office for Diversity from 2003–2006. "Her unique combination of philanthropy and library know-how position her to be the leader ALA needs today," writes ALA President Wanda Brown.

Hall started her career directing shelters and transitional housing for homeless youth and then took a position in youth services at the Seattle Public Library, where she notes she "fell deeply in love with libraries." In 1998, she became part of the ALA's first cohort of Spectrum Scholars, a then-new program to diversify librarianship, completing her MLIS at the University of Washington. After working at the New Haven Free and Hartford Free Public Libraries, she went on to become the second director of ALA's Office for Diversity in 2003, where she administered the Spectrum program and became a visible and well-regarded



leader, speaking nationally; delivering diversity, equity and inclusion trainings; commissioning and co-authoring Diversity Counts, ALA's first comprehensive study of gender, race and age in the library profession; and authoring three successful IMLS grants to expand the Spectrum Scholarship Program. She left ALA in 2006 to become assistant dean of Dominican's Graduate School of Library and Information Science. Most recently, Hall worked for Chicago's Joyce Foundation developing grant programs.

Hall became the 10th Executive Director and 24th chief staff officer of the 144-year-old association. 

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



You're not looking for another breakout—you want a breakthrough. In a city where unconventional places meet state-of-the-art convention space, success can be found everywhere you turn. So come, and let Phoenix surprise you.

Explore more at
visitphoenix.com/meetings.



There's More Great FORUM Content Online

Looking for more *FORUM* content to digest? Here's a sneak peek of what's now exclusively available on *FORUM* Magazine Online:

After reading in *Fast Company* that the average CEO reads 50 books a year, Amy Thomasson decided to set a goal. "I travel with a book in my purse or work bag, and use spare time in waiting rooms, lobbies and train cars to engage with learning rather than disengage by scrolling through my phone. Reading has transformed these daily minutes from squandered to significant," she writes. Despite being a working mom, a student and changing jobs, Thomasson read 100 books over two years.

READ about the lessons she learned and the titles of every book she read in this online issue, found on forummagazine.org.

PCMA Foundation Visionary awards: 2020 Supplier Honoree: Bill Grusich, CMP, FASAE

Bill Grusich is best known in the industry for his counsel and dedication to helping others, for which he has received numerous accolades, including ASAE Fellow, MPI Chicago chapter's Hall of Fame and Richard A. Daignault Award (given by PCMA's Greater Midwest Chapter). Grusich has served as an industry trailblazer with a career that showcases his collaborative and ethical sales approach, paving the way for how buyers and suppliers in business events should do business.



Promotions and Changes

Nancy Upke Gargula joined the MacArthur Foundation in January of this year as their manager of special initiatives for people and culture. Nancy is an Association Forum member and volunteers on the Welcoming Environment® Committee.



New Association Forum Members

Individual Members

Noonie Aguilar, DuPage Convention & Visitors Bureau
Allie Boyaris, American Camp Association, Illinois
Tracey Brouillette, Visit Spokane
Christina Dawson, Visit Charlotte
Martin Downs, American Institute of Steel Construction, Inc.
Michael Gallo, CASE, CMP, New York Marriott Marquis Hotel
Nurys Harrigan-Pedersen, Careers In Nonprofits
Michael Hoffman, Gather Voices
Eileen Morgan Johnson, Whiteford, Taylor and Preston, LLP
Sherard Jones, Strategic Futurist Consulting Solutions
Dr. Sherry Keramidas, American Occupational Therapy Association
Brian Knier, IPC - Association Connecting Electronics Industries

Mark Leon, Million Dollar Round Table
Jetaun Mallett, Independent
Nakhia Morrisette, Solar Energy Industries Association
Mir M. Mustafa, CAE, J.D., National Electrical Contractors Association
Paul Plasterer, Starkweather Association Services LLC
Helen Anne Richards, HA Richards Writing & Editing
Gwen Satterfield, TCS Education System
Eddie Slaughter, Gather Voices
John Thurner, North Park University
Brandon Tran, Signature Bank
Heather Zimo, International Association for Healthcare Security and Safety

Forum Plus Members

Michelle Arias, American Association of Neurological Surgeons
Reva Bhushan, Society for Vascular Surgery
Karen Craven, Association for Corporate Growth
Roxanne Dobbs, Executive Director, Inc.
Ben Glick, Association for Corporate Growth
Steve Hall, Society for Vascular Surgery
Lauren Hamm, Emergency Nurses Association
Kate Holzkopf, Urgent Care Association (UCA)
Grethel Huerta, Association for Corporate Growth
Kristopher Huffman, Society for Vascular Surgery
Frank Hugelmeyer, National Marine Manufacturers Association

Stephanie Klavohn, Emergency Nurses Association
Thomas Klemens, Precast/Prestressed Concrete Institute
Ken Lored, Emergency Nurses Association
Michelle McAvoy, Association for Corporate Growth
Caroline Morgan, Society for Vascular Surgery
Abu Muhammad, CCIM Institute
Anand Pillai, CCIM Institute
Rose Portera, Emergency Nurses Association
Heather Shin, Society for Vascular Surgery
Nicole Thompson, Association for Corporate Growth
Zack Wahlquist, Chicago Association of REALTORS®



A NEW VIEW *For Your Crew*

CHICAGO'S
FIRST LADY
— ∞ —

Chicago's finest fleet offers spacious open-air decks, enclosed air-conditioned salons, premium bars and exceptional caterers to make your next event unforgettable.

**TO BOOK YOUR EVENT
CALL 847-358-1330**

TO LEARN MORE VISIT
CRUISECHICAGO.COM



CALENDAR

MARCH

Women's Executive Forum

March 11, 2020
8:30 a.m.–6:00 p.m.
W Chicago, City Center, 172 W. Adams St.,
Chicago, IL

Women leaders in the association and nonprofit community will come together for critical conversations regarding issues unique to women in the industry. Participants will find their unique voice by exploring topics including personal brand, career strategy plans, negotiations and unique value. They will walk away with personal and professional growth ideas and inspiration for their teams and themselves.

Fundraising and Development SIG

March 11, 2020
4:30 p.m.–6:00 p.m.
Forum Headquarters, 10 S. Riverside Plaza,
Suite 800, Chicago, IL

The Fundraising and Development SIG focuses on independent foundations, subsidiary foundations and relations with parent associations and the role of development within them.

Webinar: Tips for Conducting Audience Research and Applying Findings to Increase Member Satisfaction

March 18, 2020
12:00 p.m.–1:00 p.m.

Comprehensive audience research is required to truly assess your members' wants, needs and reasons to become and stay a member. Drawing from real-life case studies, Lead User Experience Designer Ruizhi Liu of Adage Tech will cover research scope definition, types of research, implementation techniques and best practices. The webinar will guide attendees from concept to practical application and provide case studies drawn from the association industry.

CEO Exchange

March 25, 2020
9:00 a.m.–11:00 a.m.
Forum Headquarters, 10 S. Riverside Plaza,
Suite 800, Chicago, IL

This two-hour facilitated roundtable discussion is for association CEOs and Executive Directors to discuss the myriad of unique business challenges and opportunities facing today's executive leaders.

SmartTech Conference®

March 31, 2020
9:00 a.m.–4:30 p.m.
OLC Education & Conference Center,
9400 W. Higgins Rd, Suite 100, Rosemont, IL

The SmartTech Conference® gives participants innovative strategies for using technology and data to increase revenue, drive membership and adapt to today's changing business environment.

APRIL

National Summit on Welcoming Environment®: From Conversation to Action

April 13–14, 2020
April 13 Evening of Celebration begins at 5:00 p.m.,
April 14 Day of Education 8:30 a.m.–4:30 p.m.
Hilton Chicago, 720 S. Michigan Ave, Chicago, IL

A positive office culture is one of the most important elements of a successful organization. It's also one of the most difficult to attain. The culture of a modern office is a Welcoming Environment®.

A Welcoming Environment® uses inclusiveness to empower people to do their best and most innovative work. It attracts the best professionals to your organization and creates a team of diverse viewpoints, talents and ideas.

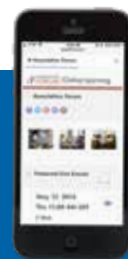
This summit isn't just talk. It's a day packed with real-world examples and data on the impact a Welcoming Environment® has on the growth and sustainability of your organization.

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

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





Launch Your Career, Organization,
and Impact into a New Era



Women's Executive Forum



Women's Executive Forum

Breaking the glass ceiling once and for all requires a Bold and Balanced approach. Take ownership of your personal brand, find your voice, and build the best you with the help of other female leaders.

March 11, 2020 | W Chicago-City Center

Supporting Partners:

Bank of America
Merrill Lynch



C | L | P
CHICAGO LAW PARTNERS



PORTLAND

VISIT
DALLAS

SmartTech Conference®

Navigate a new decade and transform the digital side of your business by incorporating AI and emerging technologies never before seen in the association industry.

March 31, 2020 | OLC Education & Conference Center

Supporting
Partners:



NAYLOR
ASSOCIATION SOLUTIONS
(Achieve More.)

Hosted by:



Transforming
for the
Digital Revolution

National Summit on Welcoming Environment®: From Conversation to Action

The results from our comprehensive diversity and inclusion study will be revealed along with concrete steps for taking action and creating a Welcoming Environment® in your organization.

April 13-14, 2020 | Hilton Chicago

Supporting Partners:

PORTLAND VettedSolutions

Hospitality Partner:



Resource Partners:



Learn more at: associationforum.org/events

What's the One App You Can't Live Without?

When I first moved to Chicago in 2017, I quickly realized the city was difficult to navigate, particularly because of the "L" system and bus routes and learning how to get from one place to another was a challenge. **Google Maps** has helped me navigate the city much more easily by providing directions, street views and live traffic updates. This app has made living in a big city immensely easier.



Sydney Edmond, MHA, Project Manager, Executive Office, American College of Healthcare Executives

I would say my **news apps**—NBC News, CNN, ESPN, NBC Chicago. It is important for me to keep abreast of events, be the events international, national, state, local

or all things sports. Being informed, even about those quirky stories that are sometimes included, makes for great conversation.



Alpha Brady, Senior Associate Executive Director and Chief Governance Officer, American Bar Association

The professional app I can't live without is **LinkedIn**. It helps me stay in touch with colleagues and also keeps me up-to-date on association and other professional news. In my personal life, I can't live without my news apps—I read the top news stories of the day every morning and before I go to bed.



Lynne Thomas Gordon, CAE, FACHE, FAHIMA, CEO, American Association of Orthodontists

Google Maps is my favorite app. It's easy to take it for granted, but it wasn't too long ago that your best option was printing/writing directions before you traveled anywhere. Not only were you out of luck if you took a wrong turn, but you were limited as to your destination. Now, I can easily find whatever I need, wherever I am. It really makes traveling much less intimidating and helps find places (even locally) that I never would have heard of otherwise.



Andrew Lomo, Government Affairs Liaison, Institute of Real Estate Management

TED offers a variety of videos, presentations and learning opportunities (both personal and professional) that inspire, motivate, change and expand my knowledge and perspective on different topics. The sharing of practical advice, knowledge, wisdom and experiences encountered not only inspires me to be a better person, but also a better leader.

Jay Cariño, MBA, CAE, Vice President of Member Services, Association of Nutrition & Foodservice Professionals



All your event management solutions, Under One Umbrella!



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

Official event solutions provider for Association Forum.

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

www.goeShow.com

eshow
event management solutions



CHICAGO. HOME TO GREAT MEETINGS

Looking for the ultimate wow factor? You'll find it in Chicago. Conferences, conventions, meetings, and special events find their home in Chicago, whether at McCormick Place, the Western Hemisphere's largest convention center, historic Navy Pier, with its stunning lakeside venues, or one-of-a-kind, only-in-Chicago spaces that fill attendees with awe.

Whether you're planning an intimate meeting for 10 or a large-scale event for 50,000, Choose Chicago's experienced Sales and Client Services teams are your one-stop resource for advanced meeting planning, provided to you at no extra cost at all. We'll assist you in finding the right hotels and venues, speakers, entertainers, transportation services, decor companies, caterers, and more.

Be sure to scan below to check out our free Meeting Planner Toolkit to help build attendance and promote your Chicago meeting!



CHICAGO
CHOOSE CHICAGO



MAY 2020



END THE NIGHTMARE