

FORUM

MAY•JUN 2020 | V104•N3

INFORMING & INSPIRING
TODAY'S ASSOCIATION
PROFESSIONALS

tackling TECH

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FORUM (ISSN 1056-0092) is published bimonthly 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.

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

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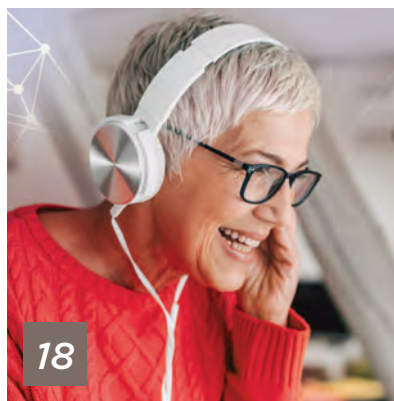
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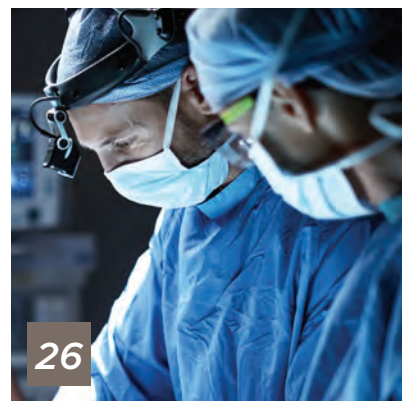
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**GEOFFREY BROWN, CAE**

CHIEF EXECUTIVE OFFICER
NATIONAL ASSOCIATION
OF PERSONAL FINANCIAL
ADVISORS

Before I get to the planned focus of my letter, I want to take a moment to say that we are with you! We know that the COVID-19 pandemic has created unprecedented times for our country, our associations and the professions we serve. It is in situations like this that we can show real leadership by digging deep, tapping into our skills, leveraging our networks and focusing on the future. Association Forum is committed to being a convener and facilitating thoughtful dialogue to help us all get through this challenging event.

I've worked in association management my entire adult life, yet I still consider myself an accidental professional. I fell into this field by chance, but with the influence and support of others, I ended up making it a career. One of the experiences that impacted my career for the better was becoming an Association Forum member. Over the last 14 years, I've gotten so much out of my affiliation and, because of the valuable guidance received from this community, I feel better prepared to address future challenges.

Many of the issues that will impact this community's future need professionals who have been supported in a similar way so that they can confront those challenges head-on. Issues like diversity and inclusion (D+I), meeting the changing expectations of members and preparing the next-generation workforce require forward-thinking professionals. That's where Association Forum is playing a vital role. Through experiences like the Emerging Leaders program, our focus on building a Welcoming Environment® and the development of the internship initiative, we're preparing members to be change agents.

Emerging Leaders

Entering its third year, the Emerging Leaders program focuses on helping advance the careers of association professionals under the age of 35. When the board approved the program, there was so much excitement about the impact those future leaders would have on our community. Having interacted with the first two cohorts, I am impressed with their professional acumen, and I'm confident they will contribute to Association Forum's success. They've already shared their professional knowledge with us at Holiday Showcase and numerous other educational programs. If there is an emerging leader on your staff, I encourage you to make an investment in their future by underwriting their participation in this program.

Welcoming Environment

Through its commitment to creating a Welcoming Environment, Association Forum is setting an example that other associations should follow. Welcoming Environment is defined as the creation of a sense of belonging and connectedness that engages individuals in an authentic manner in which uniqueness is valued, respected and supported through opportunities and interaction. It is this action-oriented and accessible focus that sets Association Forum's efforts apart from other D+I initiatives. Later this year, Association Forum will share results from the first-ever Welcoming Environment research study to illustrate the impact of implementing D+I initiatives in your organization's strategic plan, and the potential results of not taking action. Thank you to our research partner McKinley Advisors and the associations that answered the call to participate in the study.

Internship Program

Last fall, the board of directors approved the creation of an internship program aimed at introducing students, especially those from underrepresented communities, to the association industry. The program's main goals are to raise awareness of associations as a career option, build a talent pipeline to help meet future employment needs and demonstrate that Chicagoland associations are committed to being good corporate citizens of the community by assisting with employment opportunities. While it is currently focused on students, I can envision a future where this program expands to include career changers and those looking to reenter the workforce. I encourage you to think about your association's capacity to support this effort when it is launched. I'd like to thank Choose Chicago and the volunteers supporting the development of this program.

As we navigate new challenges brought on by the pandemic, continuing our focus on creating a Welcoming Environment, educating students and their influencers about careers in association management, and investing in the next generation of leaders are still important. The futures of our profession and this community depend on it. [F](#)

A stylized, handwritten signature in black ink that reads "Geoff Brown".

CEO Michelle Mason's regular letter will return in the next issue of *FORUM*.

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

Be a Welcoming Environment

We are a welcoming environment that actively seeks to enhance the larger community by recognizing the whole is greater than the sum of its parts. We will make everyone who interacts with us feel welcomed, represented, engaged, inspired and empowered.

Embrace Innovation and Quality

We love to try new ideas and seek inspiration from inside and outside the association community—we value improvements big and small. Experimenting with breakthroughs is encouraged and celebrated; however, we know when to pull the plug. We aim to continuously improve.

Have Fun and Stay Positive

It's a fact that you generally spend more time with your co-workers than you do with your own family. We strive to make our work environment one that is fun, positive and an overall great place to work.

Open and Honest Communication and Teamwork

You don't know what you don't know! Effective communication is key. We shall cultivate an environment where we speak openly, honestly and with the goal of building a better team. Candor is constructively embraced. We will work collaboratively to deliver value to members.

Accountability—Own It

We hold each other accountable and expect people to respectfully ask questions and raise concerns. Because work requires interdependent teams and collaboration, we will trust and depend on each other to be responsive and to deliver value and quality services to stakeholders.

Win with Integrity

We operate ethically, contributing our time, talents and know-how to advance our communities where we work and live. We commit to growing our association in ways that benefit the environment and society.

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

提供友好环境

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

欢迎创新和高质量

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

享受乐趣，积极进取

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

开放、诚实的沟通与合作

知之为知之，不知为不知，交流学习才能获得新知！所以，有效沟通非常重要。我们应该创建一个可以开放、诚实交流的工作环境，并将打造更好的团队作为目标。因此，我们积极欢迎坦率的交流。我们将紧密合作，为成员创造价值。

负有责任感

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

用诚信赢得尊重

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

The Tech-Savvy CEO

Even CEOs who don't feel comfortable taking the driver's seat in their organization's technology strategy can still play a vital role in shaping it. Management consulting firm McKinsey & Co. outlined questions that all CEOs should be asking when it comes to their organization's IT plan. Ten questions can help CEOs determine whether their companies' IT functions possess the qualities that make IT effective.

Modern IT function

Role

- Collaboration with the business on shaping strategy and streamlining operations
- Alignment between IT and the business
 - Targeted technology investments
 - Advocacy for end users

Resource model

- Talent, methods and tools to accelerate innovations
- Ample engineering talent
 - Agile working methods
 - Leading-edge tools
 - Targeted vendor partnerships

Technology foundation

- Flexible, scalable systems that speed up releases of IT products
- Modular architecture
 - Enterprise-wide data and artificial intelligence (AI)

What the CEO should ask to accelerate technology transformation

1. How are we making key technology decisions at all levels of the company?
2. How do we track and maximize the value produced by our major technology investments?
3. How often do our tech teams seek input from users?
4. Have we placed high-caliber engineers in IT roles that contribute the most value to the company?
5. How many projects has IT shut down because they weren't providing value?
6. How long does it take for our company to deploy new applications?
7. Which of our IT capabilities do vendors provide and why?
8. How much custom development work goes into building new IT solutions?
9. What percentage of business decisions are we making with help from AI?
10. For our developers, is cybersecurity a hindrance?

Source: McKinsey & Co., "The CEO's New Technology Agenda"



The Path to Cybersecurity

The Cybersecurity & Infrastructure Security Agency within the Department of Homeland Security has an array of resources in its “Stop. Think. Connect.” toolkit. Among them is “5 Ways to Be Cybersecure at Work.” Here are some of the key takeaways to share with your organization:

- Treat business information as personal information. Along with trade secrets and company credit accounts, it also includes employee personally identifiable information (PII) through tax forms and payroll accounts and member information.
- Remember that security measures only work if used correctly by employees. Smart devices are constantly “talking” to one another. In order to prevent data breaches, take proper security precautions and ensure correct configuration to wireless devices, like smartphones, laptops and wireless printers.
- Keep your software updated to the latest version available. Use automatic updates and scans, so you don’t have to worry about falling behind.
- Social media is part of the fraud tool set. A simple Google search can give cybercriminals information about your partners, vendors and internal departments. “Employees should avoid oversharing on social media and should not conduct official business, exchange payment or share PII on social media platforms.”
- It only takes one time. Data suggest that many breaches can be traced back to one security vulnerability, like an employee clicking on a seemingly harmless link. “Be wary of unusual sources, do not click on unknown links and delete suspicious messages immediately.”



Source: cisa.gov

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Strategic Technology Planning Update

Is your association’s technology strategy part of your all-encompassing strategic plan? If you need some guidance on developing or modernizing your tech plan, Association Forum has just updated “Strategic Technology Planning for Associations,” one of many Professional Practice Statements available online at associationforum.org. The statement offers members direction every step of the digital way, from guidelines on needs assessment, budgeting and project management, to implementation and evaluation. Here is an excerpt from the statement:

“A successful IT strategy is one that furthers the organization’s mission by supporting the overall goals of every functional area to best serve members. The process of developing the strategy should begin with a clear view of the organization’s overall strategy and business goals, and it should include collaboration and communication with stakeholders at every level. These overall goals should be translated into goals for the IT department, which then form the basis for the IT strategy. Finally, the supporting IT processes must be carefully planned to translate the IT strategy into action.”

71%
**OF PROFESSIONAL
ASSOCIATION MEMBERS**
say they worry about data
privacy and security, but
it does not prevent most
of them from sharing
information if they feel it is
secure and/or for their benefit.

/// **START STRATEGIZING.** Read the full statement at associationforum.org/browse/practice-statements.

Source: Community Brands, “The Digital Evolution Study”



Drug-free Workplaces: Up in Smoke?

BY SUSAN F. CARLSON

Q: WITH RECREATIONAL CANNABIS NOW LEGAL IN ILLINOIS, CAN WE CONTINUE TO ENFORCE OUR DRUG- FREE WORKPLACE POLICY?

A: Yes. Although Illinois residents aged 21 and over can (as of Jan. 1, 2020) legally consume, purchase and transport cannabis and related paraphernalia, and possess defined limits of cannabis and cannabinoid products, the Illinois Cannabis Regulation and Tax Act (the “Act”) has explicitly affirmed that employers, including associations, may continue to adopt and maintain zero tolerance and drug-free workplace policies.

Specifically, the Act permits employers to adopt “reasonable” drug-free workplace policies that:

- subject employees and applicants to drug testing;
 - forbid employees from possessing, being under the influence of, or using cannabis while in the workplace, performing job duties, or on call; and
 - incorporate disciplinary measures up to and including termination.
- The Act falls somewhat short, however, in that it fails to define “reasonable” in the context of a drug-free workplace policy. As an additional complicating factor, the legalization of recreational cannabis means that, in the absence of a “reasonable” workplace drug policy, the Illinois Right to Privacy in the Workplace Act (“RPWA”) prohibits employers from discharging, refusing to hire, or disciplining an employee through disadvantageous compensation, benefits, terms, etc. for using lawful products during nonworking and non-call hours.

The Act does provide some guidance in requiring employers to have “a good faith belief” that an



employee is in possession, or under the active influence, of cannabis in the workplace prior to imposing any discipline or termination. To make such a determination, employers may look for symptoms that demonstrate impairment or decreased performance of the employee's speech, physical dexterity, agility, coordination, or demeanor, and they may assess whether they believe the employee exhibits irrational or unusual behavior. In addition, employers may look for signs of negligent or careless operation of machinery, disregard for safety, involvement in an accident that causes injury or damage, disruption to production or carelessness that results in injury to others. If an employer concludes an employee is under the influence and takes disciplinary action, the employer must provide the subject employee with an opportunity to contest its determination.

Although a connection between monitoring for cannabis and monitoring for alcohol can be made, cannabis testing is more difficult as it cannot establish recent use as reliably as alcohol testing can. Accordingly, a positive cannabis test result can be misleading.

Given the dependability issues, employers should recognize that cannabis testing within the confines of an established policy may not provide straightforward answers or a clear basis for disciplining an employee.

In addition, the Act specifically reminds employers to apply drug-free policies in a nondiscriminatory fashion and expressly states that it does not "enhance or diminish" protections afforded by the Compassionate Use of Medical Cannabis Program Act ("Medical Cannabis Program") or the Opioid Alternative Pilot Program ("Opioid Program"). The Medical Cannabis Program permits cannabis possession and use by individuals diagnosed with certain debilitating medical conditions. The Opioid Program grants patients diagnosed with certain medical conditions the right

to seek medical cannabis instead of recommended or prescribed opioid treatment. Like the Act, the Medical Cannabis Program expressly acknowledges an employer's right to adopt a drug-free workplace. At the same time, employers should be aware that those employees covered by the Medical Cannabis Program necessarily carry a recognized diagnosis, which potentially provides them additional job protection arguments. In those situations, and for every situation, employers should ensure that their policies and testing programs do not single out any person or group.

Going forward, associations with employees in Illinois should review their employee handbooks and existing policies to:

- evaluate whether to adopt a zero-tolerance or drug-free workplace policy; and
- assess if current policies warrant updates to be more "reasonable."

Given the legalization of cannabis in Illinois, employers should consider taking a common-sense approach to adopting or enforcing such policies. For example, it would be prudent to evaluate which jobs and job tasks are appropriate for routine or random cannabis drug testing (e.g., use of heavy machinery, operating a vehicle), rather than attempting to test for cannabis for all employees. In short, focusing on workplace safety will help Illinois employers tailor appropriate and reasonable drug-free policies to their places of employment and give themselves the best opportunity to successfully implement those policies.

Finally, associations should be aware that federal laws remain more restrictive than the Act, and state laws vary. Thus, organizations with employees in multiple states must take care to review their employee handbooks and other applicable employment-related policies to confirm compliance with the relevant laws in each jurisdiction. **E**

THIS LAW REVIEW WAS WRITTEN BY SUSAN FEINGOLD CARLSON AND EDITED BY JED MANDEL, BOTH OF WHOM ARE FOUNDING MEMBERS OF CHICAGO LAW PARTNERS, LLC. CLP SERVES AS THE ASSOCIATION FORUM'S GENERAL COUNSEL.



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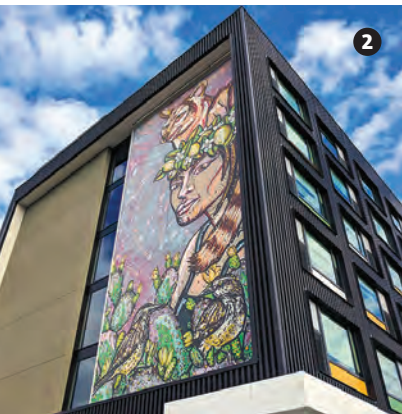
PHOENIX, ARIZONA



BRIGHTER DAYS AHEAD. In Phoenix, lush desert landscapes give way to an inviting and revitalizing city. When the time is right, our state-of-the-art convention center, new and reimagined accommodations, iconic sunsets and urban hiking trails will be here.

In Phoenix, meetings are still our specialty. And we invite you to rise with us.

Greater Phoenix is home to more than 66,000 rooms at more than 480 hotels and resorts, and the city's downtown core offers more than 4,000 hotel rooms, with more on the horizon.



The **Cambria Hotel Downtown Phoenix Convention Center**, a 127-room property opened in late 2019. The \$26 million hotel features a rooftop bar that can accommodate up to 499 guests and 900 square feet of indoor meeting space.

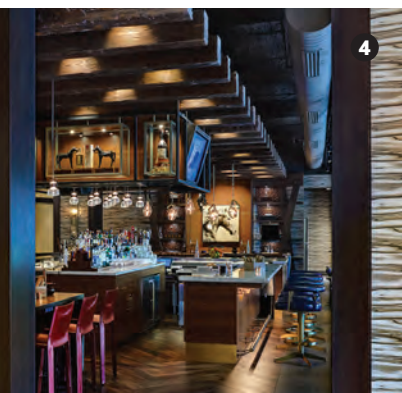
The **AC Hotel by Marriott Arizona Center** broke ground in September 2019. The 199-room hotel is scheduled to open in 2021.



The **Sheraton Phoenix Downtown** is revamping its 1,003 guest rooms, followed by lobby, restaurant and meeting space updates.

The **Hyatt Regency Phoenix** kicked off floor-to-ceiling renovations of its 693 guestrooms as well as revitalization of meeting spaces and three new meeting rooms.

The **Renaissance Phoenix Downtown Hotel**, which completed a \$12 million lobby and exterior renovation in 2017, has now shifted focus to remodeling their guestrooms rooms.



- ❶ The downtown Phoenix skyline from Phoenix Mountains Preserve.
- ❷ The newly opened Cambria Hotel Downtown Phoenix Convention Center in the Roosevelt Row Arts District.
- ❸ The Hyatt Regency Phoenix is one of three convention hotels to reveal reimagined looks and renovated spaces.
- ❹ Dust Cutter, in the Renaissance Phoenix Downtown Hotel, debuted elevated pub plates and cocktails following the hotel's renovation.

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Destination Stats

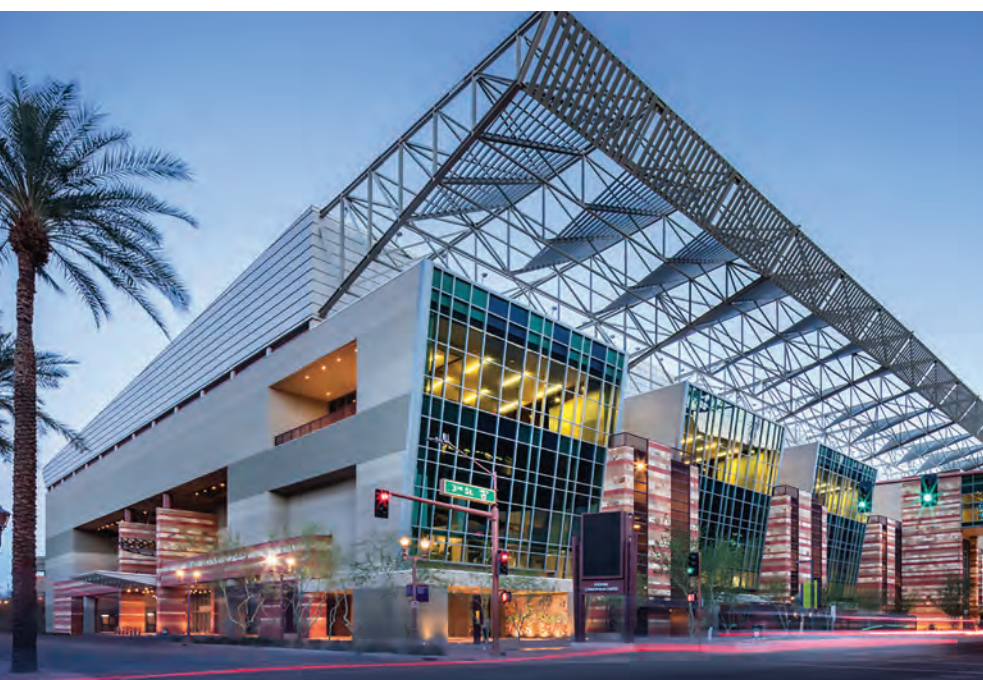
- The Phoenix Convention Center has 900,000 square feet of flexible meeting space (indoor) and recently unveiled Canyon on Third, 80,000+ square feet of urban outdoor event space.
- Phoenix is home to more than 200 miles of trails, including 50 at South Mountain Park and Preserve, located less than 8 miles south of the Phoenix Convention Center.

Airport Proximity

The city's downtown core is 4 miles – about a 10-minute drive – from Phoenix Sky Harbor International, which was ranked No. 1 in the nation by the *Wall Street Journal* in 2019.



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FOCUS

Expertise in technology is more than an asset — it's a necessity. Learn how to develop and leverage your tech strengths to keep your association moving forward.

“It's very rare for any kind of significant tech improvement to come from the bottom up. It has to first be embraced at the top.”

Tackling Tech, *pg. 14*

“But the fact remains that having online, self-paced courses does meet a pretty big market niche and is worth pursuing.”

Digital Lifelong Learning, *pg. 18*



THE FUTURE IS
NOW

“It's important to really talk about your members as the humans they are and show some empathy for them in ways that perhaps haven't been communicated before.”

Member-First Approach, *pg. 22*

tackling TECH

How to
overcome your
association's
struggles with
technology



By Meredith Landry

If one thing is certain in this modern digital age, it's this: The pace of technology is not slowing down anytime soon. As the number of users, programs, platforms and tools continues to grow exponentially, the only option for any kind of business is to get on board or risk becoming irrelevant.

It's no secret that, for some associations, staying current on technology is a struggle. Whether it's because of frequently changing leadership, a shortage of IT resources or a lack of agility, keeping up to date can seem daunting.

But to deliver real value to members in today's ever-evolving digital world, staying technologically relevant is not just a value-add — it's a necessity.

"Our members are more sophisticated, and they expect us to act and provide the same 24/7, mobile, personalized experiences that other subscription, product or service companies provide. Often, they expect us to provide a 'concierge' experience due to the exclusive nature of our relationship," says Simona Rollinson, chief technology officer at global technology association ISACA, headquartered in Schaumburg, Illinois.

"Changing a Tire at 60 mph"

If technology's importance is indisputable, why do some associations have trouble keeping up? Experts agree that the sheer speed of all the advancements makes it easy to fall behind.

"As the pace of technology change is increasing, the pace of software and hardware end-of-life exceeds the velocity in which organizations can change," Rollinson says.

Associations tend to accumulate "technical debt" since their average lifespan is longer. This means that not only do associations have to keep up with the new and expanding expectations of their members, but also upgrading legacy systems.

"Changing a tire at 60 miles per hour is how I refer to this fragile balance," Rollinson says.

Another hurdle that can prevent technological advancement is changing leadership roles. When these roles change so often in associations, it can be difficult to stay on top of change management and technology.

Lastly, associations may lack the adequate resources to address a dearth in technology, says Dan Hickey, strategic consultant, technology management for Chicago-based tech consultancy DelCor Technology Solutions.

THE THREE TECH AREAS ASSOCIATIONS SHOULD MASTER NOW

No matter where an association is along the technology continuum, there are certain tools to consider now. Simona Rollinson suggests focusing on these three areas first:



A mobile-first approach



A solid understanding of artificial intelligence and how it can help you automate portions of your business to focus talent on higher-level functions and priorities



Cybersecurity (Turn to page 7 for tips on starting a cybersecurity plan)

But more important than the specific technologies, it is paramount to understand your environment and business to build a solid foundation. Once you put in place strong capabilities around risk-based and data-driven decision-making, you are on a solid ground.

“Technology evolves so quickly right now, and many associations struggle to find the right people in tech roles to facilitate that,” he says. “You can’t just have an IT department focusing on technology anymore — all staff use a variety of digital technologies. They don’t have to be experts, but the entire organization needs to embrace and understand the role technology plays in their association.”

It’s important to keep in mind that technology isn’t just about adopting the latest tools and shiny gadgets. It’s about streamlining your processes, improving efficiency, enabling your staff to work from anywhere and delivering the most value to your members, who are growing increasingly hungry for new, personalized experiences.

“The old adage that ‘every company is a technology company’ has never been truer than it is now. Technology is no longer about networks and email — it is about business enablement and disruptions to business models,” Rollinson says. “We need to continuously reimagine ourselves so we stay relevant. As costs and barriers to technology-driven innovation decrease, the speed of business change continues to accelerate, and new/unknown competitors enter the scene.”

The longer an association waits to address technology, the more complicated it becomes, says Jim Young, co-founder and CEO of Realcomm, a San Diego-based digital media and events company focused on technology, innovation and operations for the commercial real estate industry.

“If you’ve ignored it for three to five years, it will probably be way too much to jump into,” he says.

“Eventually, it just gets too complicated, and the association will struggle greatly.”

If you feel that your association is struggling, then it is time to get to work.

Addressing the Problem

How can an association begin to evaluate its technological shortcomings?

The first thing to do is to admit to and identify any weaknesses.

“They must first admit, out loud, how far behind they truly are,” Young says. “Especially at the senior level, folks have to admit that they are not experts in technology and that their lack of expertise may have allowed the association to fall behind.”

The next thing to do is to stop thinking of technology as just an IT problem. It is a business problem and must be addressed that way.

“Ensure the ongoing success of the technology rationalization and investment effort by gaining the active engagement and leadership of business executives, and get a seat at the table,” Rollinson says. “Also, change the focus of rationalization of technologies and platforms from an IT initiative to a business initiative by focusing on business process standardization.”

Hickey agrees that without the buy-in from all of an association’s leadership, any new technology will be dead on arrival.

“It’s very rare for any kind of significant technology improvement to come from the bottom up,” he says. “It has to first be embraced at the top. This will then

trickle down throughout the organization. If the top prioritizes a technology initiative, it's easier for everyone else to get on board."

Outside Help

Once you assess your location on the tech spectrum, it's time to get some help. Since most associations won't be able to adequately address their technology issues internally, it's a good idea to hire an outside consultant.

Look for a consultant who not only knows the tech space, but also knows how associations work, Young says.

"Associations are unique entities, so you want a consultant who understands your association's specific goals and needs," he says.

He also advises against assembling a member-based tech committee to lead the charge. It's too

late to tackle it internally, he says, and members won't move as quickly as a consultant will. On top of that, it's difficult for internal teams to openly and honestly review their own skill sets.

A consultant will not only be able to implement change faster but will also stay objective. Because of

that, he or she will be able to more clearly outline a plan that is aligned with your business strategy.

Looking to the Future

If you want your business to move forward technologically, so too should your staff. When you interview potential new employees, ask them about their tech competency. Make sure that all new hires have the aptitude to work with the digital tools that are becoming commonplace, Hickey says. "Everyone uses it, it's not going away, so all of your employees should have a solid foundation in working with technology," he says. "The more people who understand it and use it, the better."

Keeping those employees happy and engaged means empowering them to work from anywhere at any time on any device. To recruit the best talent, and to improve efficiency association-wide, implementing a telecommuting policy is critical.

"Given the circumstances surrounding the coronavirus, the entire world has had a 30-day crash course on digital transformation," Young says. "Organizations all over the world have told their staff to work from home, and videoconferencing has become the norm for

kindergarteners to CEOs. Can your association handle that? If you're still running your organization like you did 30 years ago — expecting people to come into the office every day — you can't be competitive anymore."

Also going forward, you should become more focused on data. As an organization, you're undoubtedly collecting data on any number of things, including your members and your marketing efforts. Do you have the knowledge and expertise to make meaningful decisions from that data?

"We see associations sit on loads of data yet don't know whether to make heads or tails of it," Hickey says. "But all that data is information you can use to answer important business questions and grow your association."


Growing Pains

As you build your tech toolkit, keep in mind that there may be some hiccups as you get started. Some of the tech you implement may not be a perfect fit. Some employees may be resistant to adopting new technology. And some old habits might be hard to break. But it is worth all of the trial and error.

"Often the thought is to just 'throw technology at it and things will get better,'" Rollinson says. "But in my experience, this approach never works without equal, if not more, attention to both people and process. The three-legged stool is 'people, process, technology.' You can't balance on only two of these legs."

While hiring a consultant, buying new technology and replacing legacy systems will cost money, the cost of not doing it could be devastating, Young says.

"Failing to invest the time and resources in tech these days is not an option," he says. "Associations that have been kicking the can down the road are about to run out of time. They have no choice but to catch up or get crushed."

Fortunately, by taking the appropriate steps, you won't have to make that choice. 

MEREDITH LANDRY IS A FREELANCE WRITER.

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“Associations are unique entities, so you want a consultant who understands your association's specific goals and needs.”

JIM YOUNG, REALCOMM

LIFELONG DIGITAL LEARNING

ASCM's Modern Approach to Continuing Education

By Sam Carlson

E-learning has transformed the educational landscape, presenting challenges and opportunities for associations that provide continuing education. At the same time, professionals increasingly need to be lifelong learners to stay competitive in the modern workplace. Associations are well-positioned to take advantage of new technologies to successfully engage today's learners, facilitate lifelong learning and drive revenue.

The Association for Supply Chain Management (ASCM) did just that when it shifted its print-based, face-to-face courseware to BenchPrep's configurable cloud-based learning platform. The modernized approach allows ASCM to cater to busy, on-the-go supply chain professionals through on-demand

learning that can be consumed in small chunks and is available on any device. Users get a personalized learning experience that, according to ASCM, can encourage remediation and increase knowledge retention.

An Opportunity to Seize

Headquartered in Chicago, ASCM is the largest nonprofit association for supply chain professionals. ASCM works with its 45,000 members, 180 North American chapters, 100 international partners and the general supply chain community to improve every aspect of the supply chain — from supplier to customer — and all the information, money and materials that flow in between.

Known primarily for its three certifications (Certified in Production and Inventory Management [CPIM], Certified



Image: blackred/istock, RgStudio/E+ Collection via Getty Images

Supply Chain Professional [CSCP] and Certified in Logistics, Transportation and Distribution [CLTD]), ASCM has been working to expand its continuing-education offerings to new audiences, including professionals who are new to the supply chain and not ready for certification; workers peripheral to the supply chain, such as those in IT or finance, who need to understand how supply chain works but don't need certification; and people looking to change careers.

ASCM also wanted to upgrade how it delivered its continuing education.

"Most of our education products were just face-to-face courseware," says Bob Collins, senior director of learning and development for ASCM. "We really wanted to expand into mobile and online."

ASCM's primary educational product is an industry mainstay called Principles of Operations Management, which covers topics essential to the profession. Initially, the program was available only as an instructor-led course, typically hosted by a corporation or one of ASCM's 180 chapters throughout North America. Course materials were printed and packaged as participant workbooks, which were sent to each site.

ASCM recognized the need to modernize its educational offerings to meet the needs of today's workforce. Busy, on-the-go and distracted, the modern lifelong learner wants on-demand education that can be consumed in small chunks. ASCM set out to find a partner who would help it create a user-friendly product that would be available anytime, anywhere, on any device.

"We wanted to have an online, mobile-friendly, self-paced extensive set of courses that folks could use to brush up on skills, learn things they didn't know and maintain their certifications as well," Collins said.

Partnership Approach

After researching potential partners, ASCM chose Chicago-based BenchPrep, a configurable cloud-based learning platform, to take its educational products online. BenchPrep works with education and training companies,

including credentialing organizations and associations, to help the end user achieve academic or professional success.

Principles of Operations Management was an obvious place to start. Its set of five courses was specifically designed to be mixed and matched. Each could be taught as an individual course, or any of the 45 total sessions could be pulled out and combined with any other sessions. This flexibility allowed companies to tailor education to specific groups of employees. Instructors had access to banks of questions to use for midterm and final exams, depending on the lessons they taught and what the learners needed to know.

"That made it even better online," Collins said. "We could get down to smaller chunks of material and help people be more focused on the type of education they wanted to get."

Over the course of more than a year, staff from ASCM and BenchPrep worked together to transform Principles of Operations Management's roughly 180 hours of face-to-face courses into 10- or 15-minute bite-sized sections. They added quizzes, videos, games and other activities and put all the content on a cloud-based platform white-labeled to ASCM. Because the look and feel of the program is configured based on the ASCM brand, users see a familiar ASCM platform, not an external service, says Ashish Rangnekar, CEO and co-founder of BenchPrep. In many cases, it is integrated with ASCM's workflow using a single sign-on. After extensive testing and piloting, ASCM rolled out Principles on Demand in January 2019.

The new program gives users the ability to set their own pace and follow personalized learning pathways. Plus, they can earn certification points for their work.

"Not only are users getting best-in-class content, but they're getting it in a format that is very personalized to them," Rangnekar said.

In addition to offering the courses to members and other supply chain professionals, ASCM sells individual licenses, or "seats," to corporations as part of a subscription.

Unlike the printed materials used in the past, the digital learning platform

draws on a rich collection of data and analytics to deliver valuable insights to all stakeholders involved: the learner, the instructor and ASCM.

Learners know how they are progressing, where their strengths and weaknesses are and in which areas they need to improve.

Instructors see how each learner is performing, down to how much time he or she is spending on a particular area.

ASCM gains insight into every piece of content: how many times a video has been watched or a lesson has been viewed, and how many users have marked the lesson as high confidence versus low confidence.

"Our job is to give all of the insights to Bob so that his content team can make changes to the program, which leads to overall program success," Rangnekar said.

Proof in the Numbers

As of March 2020, Principles on Demand was averaging 420 monthly users, who averaged 4.5 learning sessions per month that lasted about 40 minutes per session. When launching the program, Collins said ASCM anticipated (and budgeted for) selling 1,000 corporate seats in the first year. Within 14 months, the association had almost tripled that number, selling 2,900 seats.

The success of the program also created a potential new revenue stream for ASCM, as a couple of large organizations showed interest in reselling the courses as an add-on to their existing education and services.

ASCM had minimal problems adapting to the new platform. But because Principles of Operations Management was created to

3x

ANTICIPATED NUMBER OF SEATS SOLD

When launching the program, Collins says ASCM anticipated (and budgeted for) selling 1,000 corporate seats in the first year. **Within 14 months**, the association had almost tripled that number, **selling 2,900 seats**.

DIGITAL LEARNING: THE FUTURE IS NOW

Associations are in a unique position to effectively leverage digital learning to better serve their members and drive revenue. According to Ashish Rangnekar, CEO and co-founder of BenchPrep, there are four major trends shaping how associations should think about digital learning.

Lifelong learning has become an economic reality.

No longer merely a buzzword, lifelong learning is essential to workers who must remain competitive in rapidly changing professions. Companies such as Amazon and AT&T are spending hundreds of millions of dollars to “upskill” and “reskill” their workforces.



The need for verified credentials is more important than ever.

Lifelong learning is even more valuable when it is competency-based. Because learning is a means to an end, like getting a new job or earning a promotion, professionals must demonstrate they have mastered a concept. A verified credential is a great way to do it.



The modern worker is busy, mobile and distracted.

Associations are not only competing for learners' attention with other associations and continuing-education providers; they're competing with the likes of Amazon, Facebook and Netflix. The challenge is figuring out how to meet learners where they are.



Content is still king, but it's not enough. It takes more than great content to engage today's professional. To be successful, content must be integrated into a meaningful, personalized, immersive learning experience that can be delivered across multiple devices.



be an instructor-led course, the material was separated into instructor versus participant. ASCM had to merge the content into a program suitable for self-study.

“It wasn't particularly difficult work, but it was time-consuming,” Collins says.

Advice to Share


Of the many lessons other associations can take from ASCM's experience, one of the most crucial is that personalized, digital learning is here to stay (see sidebar).

“There's a lot of hype around the whole education space and how it's changing,” Collins says. “Some of it is worth listening to, and some of it is a little exaggerated. But the fact remains that having online, self-paced courses does meet a pretty big market niche and is worth pursuing.”

And associations need not go it alone. BenchPrep brought several capabilities that ASCM would have had to hire or purchase otherwise, including technical expertise and system maintenance. Plus, BenchPrep had the experience of successfully rolling out similar programs with other clients.

“Look for the right partner for you, try something and see how it goes,” Collins says. “You don't have to invest all your dollars up front.”

Associations have the opportunity to capitalize on professionals' need for lifelong learning. Those who decide to invest in modernizing their educational offerings can improve member engagement — and their bottom line.

“If done right, this is a phenomenal, high-margin revenue stream for associations,” Rangnekar says. “This is not a cost center. Professionals are willing to pay associations for really impactful learning experiences.” 

SAM CARLSON IS A FREELANCE WRITER SPECIALIZING IN ASSOCIATIONS.

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MEMBER- FIRST **APPROACH**

When it comes to improving the digital user experience, empathy is crucial

By Jamie Friedlander

In the past few years, the American Society of Anesthesiologists (ASA) has undergone a total digital transformation. Gonzo Schexnayder was brought on to the ASA team in July 2017 as the director of digital product management.

He has spent the past two-and-a-half years transforming the association's digital user experience by setting measurable goals and tracking them, collecting detailed user feedback and mapping member journeys.

We spoke with Schexnayder about the ASA's digital transformation and what other associations can learn from their journey.

FORUM: When you began focusing more on the digital user experience, what types of goals did you set?

Gonzo Schexnayder: When I was at other companies, the key performance indicator (KPI) of a website was always how much traffic you got in the form of sessions and page views — especially for ad-driven websites. My goal at the ASA was to have members visit our website more frequently but spend less time and fewer page views getting there.

Anesthesiologists are really busy. We know they're constantly moving between operating rooms, and they're in very high-anxiety roles. I don't want them visiting the website for something they need to help them in their career and spending any time on the website getting to it. I want them to find it immediately.

To facilitate this, some of our goals have been improving navigation, improving search results and improving page speed and how quickly a page loads. All of those things factor into the decisions we make when we look at improving various aspects of the digital experience.

FORUM: What type of data have you collected in order to inform your decision-making?

GS: We've reviewed the registration process to ensure it has the best user experience possible and highest conversion factors across each of the pages.

We also do a lot of research with our members. In product management, you can't make decisions without research and data. I'm deeply involved with Google Analytics and outcome data from the experiences our users have. We look at both quantitative and qualitative data. For example, when a member services representative gets a call from a member who's had a horrible experience, they'll often forward them to me, and I'll give them a call to talk about it. Nine times out of 10, what they bring up will help me find a way to improve the website.

We've also been doing a bunch of interviews. Two years ago, we launched the Lifecycle and Ecosystem Project in which we look at the lifecycle of a member from the moment they decide to be an anesthesiologist to the moment they retire. We've been interviewing members in various cohorts to

understand their lives as anesthesiologists — where they go for information, what kind of information they get, the level of anxiety they have at various points of their career. We want to really understand them, so we can support them better.

We can look at all of the phases and transitions of their career and target our products and services to each of those phases and transitions in order to figure out where we might have holes in the value we provide to our members.

FORUM: What results have you seen so far?

GS: When I first started at the ASA, we were using an expensive survey tool to ask about user satisfaction. I switched over to Google's Website Satisfaction Survey that asks users four simple questions:

- Overall, how satisfied are you with this website?
- What, if anything, do you find frustrating or unappealing about this website?
- What is your main reason for visiting this website today?
- Did you successfully complete your main reason for visiting this website today?

We've made significant improvements. Since early 2018, I've run the same survey quarterly. When we launched our new website in October 2018, our satisfaction scores dipped, which is expected when you make a big change. But since then, we've seen a gradual return of our satisfaction scores above base level.

In Q2 2018* when we initially began collecting data, 40.9% of respondents were very satisfied with their experience on the website, and 23.2% were somewhat satisfied (a combined 64.1%). In Q3 2018, when we launched the new website, these numbers went down to 38.7% and 18.4%, respectively (a combined 57.1%).

In Q4 2019, our results showed that 49.0% were very satisfied with their experience on the website, and 22.3% were somewhat satisfied. My goal this year was to raise that combined percentage above 73%. Right now, we're at 71.3%.

FORUM: Focusing on the user experience can be a shift for some associations. Did ASA have to shift its mindset in any way?

GS: Just the language of user experience and product management was new to the staff.

With associations, a committee will often come up with an idea — we want to build this thing or write this thing or do this thing — and the general rule is that the staff does what the committee members want.

One of the things product management really helps with is establishing what part of our membership this “thing” is for. For example, building a guide for anesthesia department administration professionals doesn’t serve every single member of our association. But knowing exactly who something is for can help you not only create that content, but also talk to those specific members to make sure that content serves their needs.

FORUM: What are some of the biggest lessons you’ve learned during your digital transformation?

GS: It’s important to really talk about your members as the humans they are and show some

empathy for them in ways that perhaps haven’t been communicated before.

When we interview our members, they talk to us a lot about production pressures. We’re never going to be able to personally change their working environment. But we can recognize that they’re under production pressures, and we

can make sure that when we communicate with them, we use the language they use, and we make decisions in light of that.

This means reducing the number of page views on a form, reducing the amount of time someone spends on the website or making it easy for them to get into an education product they bought last week. We don’t want them spending 10 minutes surfing the website trying to find it.

FORUM: What are some of your biggest goals moving forward?

GS: One of the things we’ve realized from interviews is that our current website navigation doesn’t support our members as well as it should. Our hypothesis going into this project is that a task- and role-based website navigation is going to be more conducive to our members finding what they need than our current organizational- and topic-based navigation.


We are going to start out by doing a card-sorting experiment both in person and with a group of members online. This will help us understand how our

members think about grouping content. We will apply that research to some wireframes, and then we’ll take those wireframes and put them in front of another group of members to get their feedback on whether the new navigation supports their needs better than the current navigation.

FORUM: What advice do you have for associations embarking on a similar journey as yours?

GS: Talk to as many of your members as you can about what they need in order to be successful. Every chance you get, find out where they go for information, where they go to complete the tasks they need to complete, why they go to those places and whether it’s your association’s website or not. Take a very empathetic approach to their careers and understanding how you can support their needs.

Your members are never going to be able to tell you exactly what they need. But a lot of times, if you listen to what they say, you can figure out what they need—even if they can’t expressly state it. Our job is to interpret what they say and build the products and services to support that need.

A marketing survey might not point out the real human nature of a high-pressure environment the way an interview will. The more you talk to people and share those interviews throughout your staff, the more human your members become and the more opportunity you’ll have to meet their needs. 

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 **Develop Your Plan** For guidance on fine-tuning your tech plan, **turn to page 7** for a peek at Association Forum’s Professional Practice Statement “Strategic Technology Planning for Associations.”

*A Google Website Satisfaction Survey “quarter” is not a typical calendar quarter, but a three-month period based on when the survey runs. Every three months, it automatically ends the data collection and starts over again.

ASA quarters mentioned above:
Q2 2018: June 6, 2018 to Sept. 6, 2018
Q3 2018: Sept. 6 to Dec. 6, 2018
Q4 2019: Dec. 6, 2019 to March 6, 2020

“Talk to as many of your members as you can about what they need in order to be successful.”

GONZO SCHEXNAYDER, ASA

WE

The world has been stunned by
COVID-19.

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like no other event in modern times.

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Achieving 'Zero Harm'

HEALTHCARE ASSOCIATIONS CAN
LEVERAGE THEIR VITAL ROLE TO
INCREASE PATIENT SAFETY

BY HEATHER SWINK, CAE

Image: shapecharge/E+ Collection via Getty Images



A misdiagnosis leaves an Iowa man suffering after an unnecessary procedure. An Illinois woman dies after catching fire in surgery. A Tennessee hospital performs surgery on the wrong infant. A brain surgeon drills a hole in the wrong side of a patient's head.

These errors, which unfortunately happen too frequently, highlight the need for a strong recommitment to quality in healthcare.

So association healthcare experts gathered at Association Forum's fourth annual Winter Healthcare Collaborative, themed "The Business of Quality in Healthcare Associations," to discuss the challenge. Held in January at the American Dental Association in Chicago, the event gave experts the opportunity to share what associations can and are obligated to do to increase patient safety — and the likelihood of desired health outcomes.

"We're all here today because we're all trying to solve common problems," Paul Pomerantz, CAE, CEO of American Society of Anesthesiologists (ASA), said during his opening remarks. "We still haven't made much movement on the quality journey ... We're here to learn who and what defines quality, what our role is as associations, what programs and services we need to provide — and how we organize and resource them."

'The Next Decade of Healthcare Quality'

The current state of quality in healthcare is lacking. Routine safety processes, like medical administration, patient identification and even hand hygiene, consistently fail. In fact, only 40% of the workforce in healthcare settings follow proper hand hygiene protocol, according to The Joint Commission, the nation's leading accrediting body in healthcare.

Existing methods of quality evaluation don't detect excellence, or how well an organization is performing above the standard. They only highlight deficiencies, said keynote speaker Mark Chassin, M.D., FACP, M.PP, M.PH., president and CEO of The Joint Commission.

"The current approach is not producing the results we want. It's evaluating performance project by project ... It's very difficult to sustain a high level of performance or spread it to other areas this way.

"Thinking and acting differently about quality is the answer," Chassin said. He challenged healthcare organizations to lead the way to "zero harm."

"Zero harm is a commitment to zero as the ultimate goal. It will not be achieved rapidly; it's the beginning of a journey. It's more than eliminating patient complications — it means zero harm to

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caregivers, [finding] missed opportunities to provide effective care and [no] episodes of overuse.”

“[Zero harm] means understanding and tracking errors in order to avoid them propagating. That’s the next decade of healthcare quality,” Chassin added.

Striving for Zero

The Joint Commission offers a framework for its new approach to quality. It is based on 10 years of work with academics and practitioners from high-reliability organizations in nuclear power, military, commercial aviation and amusement parks along with The Joint Commission’s experiences accrediting and certifying more than 23,000 hospitals, ambulatory centers, laboratories, homecare and other organizations.

First, leadership must become committed to the goal of zero harm. “You must put aside the objections that, ‘It’s impossible,’ or ‘The boards or doctors won’t go along,’ ‘It will cost too much,’ ‘We don’t know how,’” Chassin said. “Because if not zero, how much harm is OK? If we don’t commit to this now, then when?”

A culture of safety must be embedded throughout an organization, he added. Root out exposure to intimidating behavior, and ensure safety rules are consistent across the organization for all individuals.

Robust Process Improvement (RPI) is producing the next generation of best practices, customized to key causes. The Joint Commission has fully adopted RPI — a combination of Lean Management, Six Sigma and change management — and all components of a safety culture. Lean empowers employees to identify and act on opportunities to improve processes and increase value by eliminating steps in processes that represent pure waste. Six Sigma

improves outcomes of processes by identifying and targeting causes of failure.

“Together, these technical solutions are the most effective way to improve processes,” Chassin said. “It only fails when an organization does not accept or implement it.”

Change management is the rocket science of improvement, Chassin added. “It’s a systemic way to implement and sustain good solutions.”

Increasingly more hospitals and systems are using RPI tools, but they are used differently, not comprehensively, with training limited to a small group of experts. The Joint Commission’s Center for Transforming Healthcare is training hospitals and systems to adopt RPI to drive major improvements.

“A one-size-fits-all best practice is inadequate — you can’t get to zero that way,” Chassin said. “Complex problems need a more sophisticated approach to problem-solving. Each [issue] requires a different intervention. Five to six key causes explain the vast majority of failures. RPI can address your key causes ... leading to safety solutions, protocols, process for high reliability healthcare.”

A handful of hospitals and healthcare systems are approaching zero harm, Chassin said. For instance, Memorial Hermann Systems achieved 71% improvement with hand hygiene — achieving 95% compliance — after implementing a solutions tool targeting hand hygiene. They discovered the causes of hand hygiene failures: dispensers were inconveniently located and often empty, providers’ hands were often full, and there was a lack of accountability. Each cause required a different intervention to be implemented, and, as a result, Memorial Hermann mastered control of the hand hygiene issue. The

hospital system began to report zero harm as their most common monthly result across a spectrum of safety events — from catheter-associated urinary tract infections to mismatched blood transfusions. In fact, over a 10-year period, Memorial Hermann hospitals have performed 1.37 million blood transfusions with zero infections.

Re-Commitment to Quality

In our professional lives, we need to have a north star, a moral compass that guides

With proper interventions in place, hospitals can gain control of issues like proper hand hygiene in the workplace.



us, said American College of Surgeons (ACS) executive director David Hoyt, M.D. ACS offers four guiding principles toward continuous quality improvement: 1) standards, individualized by patient and backed by research; 2) the right infrastructure, e.g., staff levels, specialists, equipment and checklists; 3) rigorous data, from medical charts, post-discharge tracking and data backed by research; and 4) verification, external peer review that creates public assurance.

To drive the transformation of quality for surgical patients, ACS created a quality safety manual, THRIVE: Transforming Healthcare Resources to Increase Value & Efficiency. ACS also developed quality programs in collaboration with other organizations to provide new standards for cancer and trauma, focus on pre-operative care and other best practice recommendations.

"We all need to re-commit to quality; it's the only way we're going to achieve it," Hoyt said. "Success is all ultimately about deciding what our commitment is to quality. For stakeholders, [commitment to quality] will mean cost transparency and predictability with reduced medical and administrative costs, reliable episode-specific quality metrics, efficient processes and decreased complexity, and a healthier population."

Sherry Keramidas, Ph.D., CEO of the American Occupational Therapy Association (AOTA), provided an overview of the association's quality initiatives. AOTA began its quality work in 2012; advanced a quality strategy in 2014; appointed a director of quality in 2016; created a set of tools called Occupational Profile — its first clinical resource to facilitate quality improvement; launched its Volume to Value program — offering a central location for payment change and quality improvement; and, in 2019, introduced its Choosing Wisely program, which outlines five areas patients and providers should question regarding quality, effective and valuable care.

"In this journey, we learned to identify practice gaps and create tools and resources for use in clinical practice and diverse practice settings, collaborate across the association for a consistent message to members, ... combine education on [regulations], reimbursement, practice and quality, and keep education accessible [by offering] free, 30-minute webinars with a focus on practice areas," Keramidas said. "Today, we're looking at how to move forward and create partnerships."



“Because if not zero, how much harm is OK? If we don’t commit to this now, then when?”

MARK CHASSIN, M.D., FACP, M.P.P., M.P.H., THE JOINT COMMISSION



Healthcare association leaders gathered at Association Forum's Winter Healthcare Collaborative in January.

At ASA, quality and practice management recently became the association's newest business unit. The unit's mission is to enhance patient safety through access to quality management. "The unit's objective was created to deliver value and resource that value," Pomerantz said.

When asked whether associations should be in the business of quality, Kathleen O'Loughlin, DDS, executive director of the American Dental Association, said it's imperative.

"If we don't enter that space, someone else will who doesn't understand the dual purpose of our organizations — to deliver patient care and grow the art and science of our profession," O'Loughlin said. "If we aren't involved, we could lose control of the real purpose of healthcare."

Ultimately, Chassin said it's up to everyone in healthcare to make the necessary changes.

"If we're not happy with the results in quality and safety, we need to think and act different, adopt the goal of zero harm and adopt the process improvement tools," Chassin said. "This needs to be the highest priority."

Pomerantz agreed with Chassin's approach and ambitious goal of zero harm to improve care and reduce mortality.

"Don't strive to improve, strive for zero," Pomerantz said. "Anything else doesn't seem reasonable." **E**

HEATHER SWINK, M.A., CAE, IS A FREELANCE WRITER AND EDITOR IN THE CHICAGO AREA SERVING ASSOCIATIONS.

“Do Not Be Distracted by the ‘Noise’”

AN INTERVIEW WITH THE 2020 WOMAN OF INFLUENCE

DEBORAH J. BOWEN, FACHE, CAE

PRESIDENT AND CEO
AMERICAN COLLEGE OF HEALTHCARE EXECUTIVES



“Associations play influential roles in the lives of others, and I love the work. Being able to influence decision makers to make a difference in healthcare is challenging but very rewarding.”

1. You've had a successful career in association management. What led you to this work? And what made you stay?

I began my career as a social worker working with heroin addicts. Often, heroin addicts have difficulty getting better because the systems around them do not support their recovery. I started thinking about how to change the systems, and that led me to a physician—the chairman of the Wisconsin Medical Society. He convinced me to work there, and I have never regretted the decision. Associations play influential roles in the lives of others, and I love the work. Being able to influence decision-makers to make a difference in healthcare is challenging but very rewarding.

2. What is important to you in your career? What makes you successful?

I never really thought about my career per se. I have always focused on doing the best job I can, which helped me succeed. That being said, there is no substitute for a good career plan. I once heard: “If you can't see it, you can't be it.”

3. There are so many technologies and communication channels vying for our attention today. How do you stay focused?

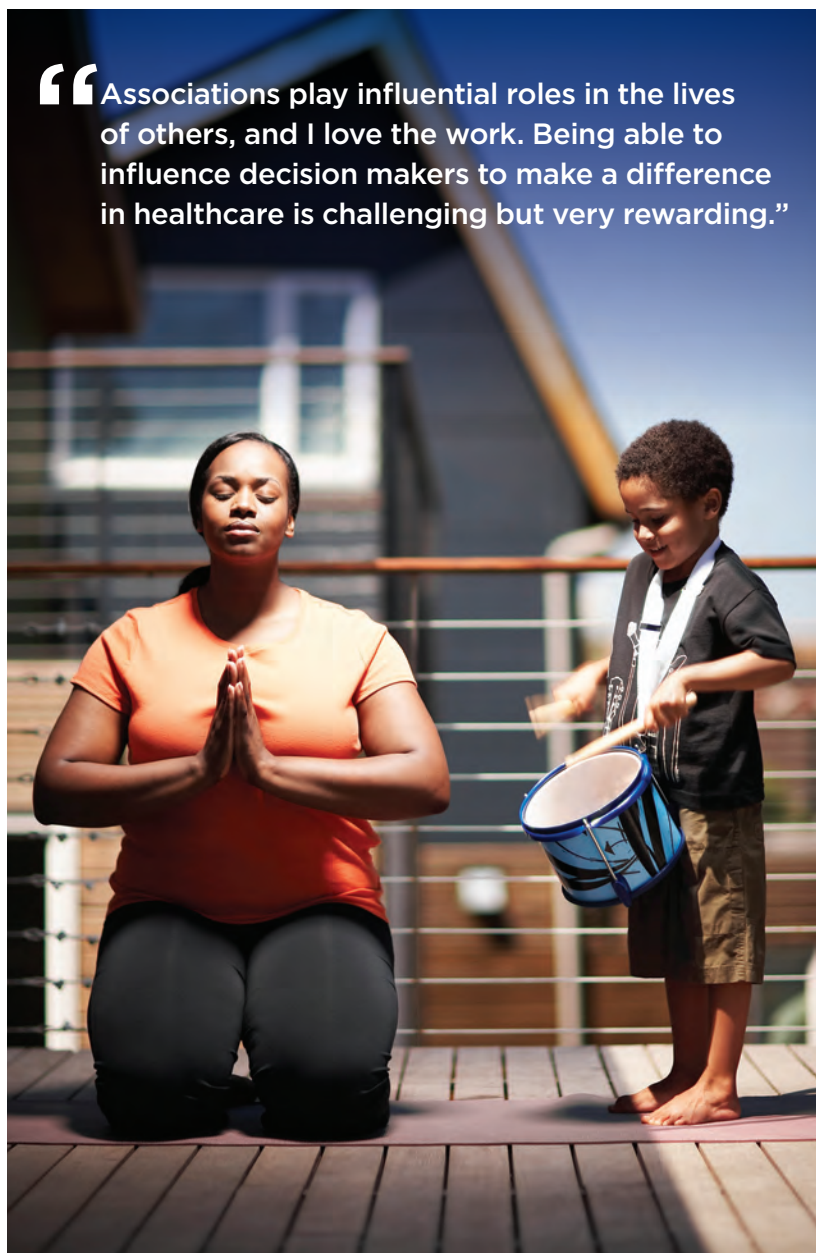
Like everyone, I am challenged with keeping up. I get more email than I can responsibly respond to. I think it is important to keep in mind technology is a powerful tool for communicating with our members and stakeholders. Therefore, I try to leverage it in the work today. Also, hiring talented professionals who have more experience in this arena than I do has helped us drive momentum and innovation.

4. Who has influenced you in your career?

I have been fortunate to have great role models—from my mother, to (former ACHE CEO) Tom Dolan, to the team I work with every day. I am always learning.

5. How do you balance work and the rest of your life?

I am not particularly good at this, but I am trying to get better. I live and work downtown, but I escape to nature as often as I can. I am also working on more family time. I try to support my team in their work-life balance as well.



6. What advice do you have for women starting out in the association industry?

- Be a student of your industry.
- Understand your strengths and development needs.
- Have courage.
- Do not be distracted by the “noise” (whether it is the voice in your head or external messages that do not help).
- Look for opportunities to expand your skills.
- Network, network, network.

7. You have two master’s and one bachelor’s degrees, and you completed the executive program in healthcare management. How has learning and continuing education impacted your career?

Learning and leadership go hand in hand. Healthcare is changing rapidly and as a leader in healthcare, it is my responsibility to make sure we are paying attention to change. I also believe the process of learning allows you to reinvent yourself. As Don Berwick, the founder of the quality movement in

driving to zero harm said, “We must do the work and improve the work.”

8. Healthcare is seeing more changes now than ever. How do you stay innovative? What advice can you lend to associations in other industries facing new technologies and disruption?

I learn from others and pay close attention to disruptors. As associations and individuals, we need to disrupt our traditional paradigms and approaches to ensure future success. Technology partners are also key. I am a big believer in importing expertise to build speed. That is the beauty of the association community—supplier partners and executives all working together.

9. What do you consider to be your greatest accomplishment?

I relish all wins. I have been fortunate to have the work of ACHE be acknowledged by Association Forum and Baldrige. This is a people business and I like to celebrate the great work that everyone does—people need encouragement and I am grateful to have a great team. **F**

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Announcing the 2020-2021 Association Forum Board of Directors

Association Forum is pleased to introduce its 2020-2021 board of directors, which assumed office April 1. Our board represents the wide diversity of organizations that form and support the Chicago-area association community.



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(automatically succeeds from Chair-Elect)

Geoffrey Brown, CAE
Chief Executive Officer
 National Association of Personal Financial Advisors



CHAIR-ELECT

(automatically succeeds from Secretary-Treasurer)

Paul Pomerantz, FASAE, CAE
Chief Executive Officer
 American Society of Anesthesiologists



SECRETARY-TREASURER

(one-year term)

Kimberly Mosley, CAE, CPE
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Congratulations to the 2020 Class of CAEs

Association Forum congratulates the 2020 class of CAEs who successfully completed the CAE examination administered nationwide on Dec. 6, 2019. ASAE: The Center for Association Leadership administers the CAE program in order to elevate professional standards, enhance individual performance and designate those who have acquired and demonstrated the knowledge essential to the practice of association management.

This year, 190 association professionals became CAEs. Association Forum recognizes the new CAEs in Illinois below.

Jim Amorin, MAI, SRA, AI-GRS, CAE
Chief Executive Officer
Appraisal Institute
Chicago, IL

Nicole Basso, CAE
Membership Manager
Institute of Food Technologists
Chicago, IL

Amy Biedenharn, CAE
Director, DPG/MIG/Affiliate Relations
Academy of Nutrition and Dietetics
Chicago, IL

Scott Brody, CAE
Senior Manager, Professional Resources
Appraisal Institute
Chicago, IL

Nathan Chamberlain, CAE
Membership Operations Manager
American Association of Nurse Anesthetists
Park Ridge, IL

Alicia Davis-Wade, MA, CAE
Assistant Executive Director
Illinois State Veterinary Medical Association
Springfield, IL

Amanda Decker, CAE
Deputy Account Executive
RSNA
Oak Brook, IL

Rachel DePauw, CAE
Director of Programs
National Kidney Foundation of Illinois
Chicago, IL

Elizabeth DeWolfe, CAE
Membership Engagement Specialist
American College of Occupational and Environmental Medicine
Elk Grove Village, IL

Brenda Dreier, CAE
Chief Operating Officer
Society for Laboratory Automation and Screening
Oak Brook, IL

Kathy Gilmore, CAE
President
Valley Industrial Association
Geneva, IL

Kristin Gover, CAE
Director, Communications
Academy of General Dentistry
Chicago, IL

Lori Granich, MBA, RDN, CAE
Director, Lifelong Learning and Engagement
Academy of Nutrition and Dietetics
Chicago, IL

Deepa Gudipally, CAE
Application Development Manager
American Society of Anesthesiologists
Schaumburg, IL

Amanda E. Hortsman, CAE
Staff Attorney
Society of Critical Care Medicine
Mount Prospect, IL

Jesmarie Johnson, CAE
Executive Director
Planning Accreditation Board
Chicago, IL

Matthew Jones, CAE
Account Executive
Bostrom
Chicago, IL

Tim Moberly, CAE
Senior Director of Technology Services
Society of Actuaries
Schaumburg, IL

Christopher G. Mundschenk, CAE
Executive Director
SmithBucklin
Chicago, IL

Courtney K. Nashan, CAE
Senior Director, Member and Stakeholder Engagement
Society of Actuaries
Schaumburg, IL

Carrie O'Connor, CAE
Account Manager
Radiological Society of North America
Oak Brook, IL

Kristin Pekoll, CAE
Assistant Director of the Office for Intellectual Freedom
American Library Association
Chicago, IL

Shannon Peterson, CAE
Director of Membership and Communities
Conference of Consulting Actuaries
Long Grove, IL

2020

Diana Scott, CAE
Quality and Registries Coordinator
American Association of Orthopaedic Surgeons
Rosemont, IL

Angela B. Taylor, CAE
Director, Membership, Marketing & Communications
Society for Vascular Surgery
Des Plaines, IL

Kim Wiatr, CAE
Association Manager
SmithBucklin
Chicago, IL

Jamie Wigand, CAE
Executive Director
Association for the Assessment of Learning in Higher Education
Crystal Lake, IL

WANT TO JOIN THE 2021 CLASS? The Association Forum CAE Study Group starts in September to prepare for the December 2020 exam. Check the online events calendar this summer at associationforum.org/events.

When you're ready.
We will be here to welcome you.



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ASAE Commemorates John H. Graham IV

In January of this year, the American Society of Association Executives (ASAE): The Center for Association Leadership lost its CEO and president, John H. Graham IV, to an ongoing battle with cancer. In celebration of his life and legacy, ASAE's board of directors approved the creation of a diversity, equity and inclusion (DEI) fund established through the association's Research Foundation.

According to ASAE, the fund will be partially restricted to DEI efforts, which will allow resources from the fund to be allocated to any DEI program as needed, guided by volunteers and determined by staff.

"The decision of the ASAE fellows and past chairs to establish this fund in John's memory is a fitting tribute," said Susan Robertson, CAE, interim ASAE president and CEO. "His commitment to DEI will be reflected through the experiences of the next generation of association professionals who will benefit from the future programs this fund will help support."

ASAE's board of directors has approved a cash distribution of \$100,000 to commemorate John and ignite the fundraising. Additionally, the ASAE board has approved a match of all gifts

at a 1:1 ratio. ASAE members, associations, industry partners and friends who choose to honor John in this way can expect 100% of these funds to support the various diversity, equity and inclusion programs of ASAE.

SUPPORT THE MISSION Email asaefoundation@asaecenter.org for more information.



Introducing the 2020 MDRT Leadership



2020 executive committee from left to right: Randy Scritchfield, Ian James Green, Regina Bedoya, Ross Vanderwolf and Peggy Tsai.

Million Dollar Round Table (MDRT), the association for finance professionals, has a diverse new leadership team at the helm. Among the leaders are Regina Bedoya, CLU, ChFC, who will serve as 94th president, and Peggy Tsai, RFP, CFP, as secretary. Ross Vanderwolf will move into the immediate past president role. Ian James Green, Dip PFS, and Randy L. Scritchfield, CFP, LUTCF, will move into their new roles as first and second vice

presidents. The leaders, with a combined experience of more than 130 qualifications, are committed to empowering MDRT members to achieve ongoing success.

"MDRT's most valuable asset is its membership, and we continue to invest in initiatives that enhance benefits, allow our members to explore tailored resources relevant to their region, experience the magic of MDRT and bring us closer to our full human potential," Bedoya said.

CEO Update Honors Association Leaders

CEO Update has announced its 2020 Association Leadership Award winners. Chosen by an independent panel of association experts, the awards recognize executives who exemplify best practices and create an environment ripe for member success. **Michelle Mason** was honored with the Professional Society CEO of the Year Award for her bold efforts to increase diversity and inclusion, like Association Forum's Welcoming Environment® initiative.

The other 2020 honorees are:

- Trade Association CEO of the Year—**Matthew Shay**, National Retail Federation
- Association Lobbyist of the Year—**Kevin Keane**, American Beverage Association

ASSOCIATION LEADERSHIP
AWARDS

Susan Robertson Appointed President and CEO of ASAE

NATIONAL SEARCH FOR PRESIDENT AND CEO WILL COMMENCE ON OCT. 1, 2020

The ASAE board of directors announced an executive staffing decision that will position the organization for sustained growth following the death of longtime president and CEO John H. Graham IV, FASAE, CAE, in January.

Effective March 1, 2020, **Susan Robertson, CAE**, was named president and CEO on an 18-month engagement. Robertson oversees all ASAE operations, including centennial-related activities and a recent board-approved strategic planning process. Since last June, Robertson has been serving as interim president and CEO during Graham's illness and has more than 19 years of experience at ASAE, including most recently as executive vice president of ASAE, and president of the ASAE Research Foundation. Robertson is the first woman to lead ASAE as president and CEO in its 100-year history.

"I'm thankful for the board's confidence and look forward to working with them and the great ASAE staff to keep us firmly on course as an organization,"

Robertson said. "I work with a very talented team, and together we fully understand and truly appreciate that ASAE represents the entire association community. We do not take that responsibility lightly, and everything we do is with an eye toward giving association leaders the tools and resources they need to be successful in their own organizations."

The board also announced that a national executive search for the next president and CEO will begin in October 2020, with the intention of a new CEO beginning Sept. 1, 2021. Information about the executive search will be posted on ASAE's website, in CEO Update and other pertinent industry publications.




AMC Forges Partnership with Psychonomic Society



Earlier this year, Association Management Center (AMC) announced a new partnership with the Psychonomic Society (PS).

Founded in 1959, PS's mission is to foster the science of cognition through the advancement and communication of basic research in experimental psychology and allied sciences. PS has an international membership of more than 4,300 scientists who conduct cognitive research on memory, learning, problem solving, decision making, language and perception. PS publishes seven peer-reviewed journals and holds a large annual meeting.

PS's executive director, Louis Shomette, will lead a team of AMC staff who will provide operations, education, program and meeting planning support.

"We are excited to be partnering with AMC," says Shomette. "We are impressed by their staff's deep knowledge and experience, breadth of resources, and strong policy and procedural controls. Together, we will work to help the Society realize its mission, forge a path for future growth and success, and continue to advance the field." 



Promotions and Changes

The Society for Academic Emergency Medicine (SAEM) board of directors voted unanimously to extend the contract of CEO **Megan Schagrin, MBA, CAE, CFRE**, through 2028.



The board noted several accomplishments and her leadership and vision as key to their decision to extend Schagrin's contract. Schagrin looks forward to continued success with SAEM. "I have had the opportunity to work at several prestigious medical associations in my career, but SAEM is truly special," she said. "The board, membership and staff all truly believe in our mission. When you have so many caring and smart people directing their focus in the same direction, it is amazing how much can be

accomplished. I feel very privileged to be part of this organization."



Jim Gibson, DelCor strategic consultant, technology management, has been promoted to vice president, Midwest. In his new role, he will continue to manage DelCor's Chicago office, which he has done since it opened in the summer of 2017, and increase his focus on business development.



Jacqueline Price Osafo, MBA, CAE, has accepted a new position as vice president of membership at American Health Information Management Association (AHIMA.)

New Association Forum Members

Individual Members

Edith Addo, American Board of Oral and Maxillofacial Surgery
John Bacon, Naylor Association Solutions
Janet M. Barrett, LaQuinta by Wyndham
Marc Bernstein, American Society of Anesthesiologists
Joan Cairney, Independent
Andrea Chang, Adage Technologies
Carolyn Dolezal, The Committee of 200
Patrick Everett, Offsite Chicago, LLC
Brian Gray, Visit Wichita
Susan Hall, National Certification Board for Diabetes Educators
Deana Hill, Fabricators
Dennis Johnson, Sort Sol Group

Dzidra Junior, MGM Resorts International
Richard M. Kasyoki, Amita Health
Shannon Margaret Kelly, Finishing Contractors Association of Illinois
Sonal Malavia, Cloud 9 Infosystems
Timothy Richard McNichols, LIG Solutions
Tom Nugent, Gather Voices
Leslie O'Neal, Akron/Summit Convention & Visitors Bureau
Lori Schiavo, Refrigeration Service Engineers Society
Russell Schoen, FourSight
Jacob Stolmeier, McKinley Advisors
Deborah Zak, National Association of Boards of Pharmacy

Forum Plus Members

Karen Ettorre, American Academy of Dermatology
Nancy Naranjo, American Academy of Dermatology
Rachel Pulido, American Academy of Dermatology
Breon Smith, American Academy of Dermatology
Elizabeth Usher, American Academy of Dermatology
Stacia Weaver, American Academy of Dermatology
Nazar Rizvi, American Academy of Orthopaedic Surgeons
Amber Simpson, American Academy of Orthopaedic Surgeons
Natalia Pergamentseva, American Association of Law Libraries
Miranda Sanks, American Association of Medical Assistants
Dennis Rizzo, American Association of Neurological Surgeons
Katelyn Bracken, American Bar Association
Xochithl Marquez, American Bar Association
Carmela Martini, American Bar Association
Jody Slate, American Bar Association
Susan Gell-Horton, American Burn Association
Usman Haseeb, American Burn Association
Erin Morrison, American College of Foot and Ankle Surgeons

Erin Ravelette, American College of Foot and Ankle Surgeons
Svetlana Abramova, American College of Healthcare Executives
Ariel Franklin, American College of Healthcare Executives
Illana Hodges, American College of Healthcare Executives
Mary Howorth, American College of Healthcare Executives
Ronney Hunter, American College of Healthcare Executives
Gina LaMantia, American College of Healthcare Executives
Kevin McCann, American College of Healthcare Executives
Jessica Porucznik, American College of Healthcare Executives
Belinda Roman, American College of Healthcare Executives
Blaize Stewart, American College of Healthcare Executives
Tracy Hollenbach, American Dental Association
Monét Jelks, American Epilepsy Society
Rick Abrams, American Medical Association
Laura Baker, American Medical Association
Sarah Langill, American Medical Association
Shane Mcgoey, American Medical Association
Kathleen O'Shea, American Medical Association

Jason Ranville, American Medical Association
Jill Lammers, American Osteopathic Association
Snaiga Busma, American Society of Anesthesiologists
Lauren Edmonds, American Society of Anesthesiologists
Alexis Smith, American Society of Anesthesiologists
Lisa Steininger, American Society of Anesthesiologists
Michelle Schaeede-Guy, American Society for Dermatologic Surgery
Tamika Walton, American Society for Dermatologic Surgery
Juan Jaimes, American Society for Gastrointestinal Endoscopy
Nakena Johnson, American Society for Gastrointestinal Endoscopy
Lauren Loeding, American Society for Gastrointestinal Endoscopy
Kristy Radcliffe, American Society for Gastrointestinal Endoscopy
Terri Turner, American Society for Gastrointestinal Endoscopy
Kristine Olson, American Society of Neuroradiology
Amber Auge, American Veterinary Medical Association
Liza Beltran, American Veterinary Medical Association
Lisa Howard, American Veterinary Medical Association
Michael Murphy, American Veterinary Medical Association
Paula Parker, American Veterinary Medical Association
Matthew Salois, American Veterinary Medical Association
April Campbell, Association of Legal Administrators
Summar Jonas, Association Management Center
Lance Mueller, Association Management Center
Sarah Tiwana, Association Management Center
Karen Szymiski, Association of Nutrition & Foodservice Professionals
Lauren Sherby, CCIM Institute
Leida Perkins, Chicagoland Apartment Association
Katherine Hastings, Coin Laundry Association
Rebecca Wyant, Congress of Neurological Surgeons
Kevin Cleary, Healthcare Information and Management Systems Society (HIMSS)
Jared Kimball, Institute of Real Estate Management
Stephanie Majercik, Institute of Real Estate Management
Yasmin Spiro, International Interior Design Association
Sheri Buergey, ISACA/IT Governance Institute
Marco Aguillon, Million Dollar Round Table
Stephen Donaldson, Million Dollar Round Table
Michelle Mangia, Million Dollar Round Table
Kirsten Rencher, Million Dollar Round Table
Cindy Ganze, National Association of Personal Financial Advisors
Mohammed Hamed, National Board of Certification & Recertification for Nurse Anesthetists
Marvin Irby, National Restaurant Association

Jennifer Shaffer, National Sporting Goods Association
Gina Florzak, Selected Independent Funeral Homes
Imani Berry, SmithBucklin
Clare Brennan, SmithBucklin
Juana Camacho, SmithBucklin
Dorothy Christoforou, SmithBucklin
Jamie Donohue, SmithBucklin
Amy Everett, SmithBucklin
Susanne Griffin, SmithBucklin
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Anna Clarke, Society of Actuaries Research Institute
Andrew Peterson, Society of Actuaries Research Institute
Lauren Scaramella, Society of Actuaries Research Institute
Michael Wolfe, Society of Actuaries Research Institute
Pam Lewis, Society of Gynecologic Oncology
Brenna Markle, Society of Surgical Oncology
Phyllis Collins, Turnaround Management Association
Michelle Dallas, Turnaround Management Association
Mary Anne Difatta, Turnaround Management Association
Scott Zeller, Turnaround Management Association
Tom Bruursema, Water Quality Association



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*Recognizing the unsung heroes whose support
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Over the years our partners have helped us deliver our mission. It is during this time that we stand united, together, and supportive.

The weeks we were forced to spend apart reminded us of how much we truly need one another.

At Association Forum, we pride ourselves in supplying our members with education, resources, and knowledge stemmed from the most innovative leaders in our industry.

However, none of it would be possible without the generous support of our partners.

Over the decades we've experienced many unexpected hardships, and we've overcome them all to remain as vital and relevant as ever. It's a testament to the strength of our community.

We'd like to take a moment to express our support, our deepest appreciation, and to recognize the partners who have undeniably made it all possible.

Thank you.



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

Upcoming Events

Forum Forward

Aug. 26, 2020
7:30 a.m.–5:30 p.m.
Venue SIX10, 610 S Michigan Ave., Chicago

Join us for a full day of education and networking as we explore what is on the horizon for associations. With an eye to the future, explore opportunities for your career, your organization and your impact. Together we will be a catalyst for change for the association industry.

- **Your career:** Where is your career headed? Whether you're looking to learn from your industry peers or develop your leadership skills, bring the potential for your future advancement into focus.
- **Your organization:** What are your organization's goals and how can you help realize those goals? Whether your organization is focused on improving its digital savvy offerings, its diversity and inclusion initiatives or reinventing a core program, get the tools to advance your organization's goals.
- **Your impact:** What does your organization's impact look like going forward? How can you help focus that mission? Learn how to leverage your organization's impact in a meaningful way so that it becomes central to propelling your organization forward. **Register at forumforward.org!**

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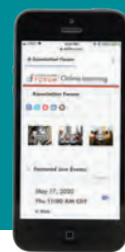
Transforming for the Digital Revolution
Sept. 30, 2020
8:30 a.m.–5:00 p.m.
OLC Education and Conference Center
9400 W Higgins Rd., #100, Rosemont, IL 60018

Navigate a new decade and transform the digital side of your business with tools and techniques for incorporating AI and emerging technologies. Keynote speakers include Simona Rollinson, chief technology officer, ISACA, and Jordan Morrow, global head of data literacy, Qlik. **Register at associationforum.org/smarttech2020.**

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Association Forum live webinars are now free for all members!

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Virtual Event Planning

If you've ever considered hosting a virtual or livestreamed event, there's never been a better time than now. In *FORUM* Magazine's web exclusive, experts from the Professional Convention Management Association (PCMA) and Matchbox Virtual Media offer their tips on how to strategize and bring your virtual event to life. Read the whole story at forummagazine.org.



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Establishing how much to charge for your e-learning offerings is a major piece to the continuing education puzzle. Get Blue Sky eLearn's expert advice on how to develop an e-learning pricing strategy in *FORUM* Magazine's web exclusive at forummagazine.org.



Transforming for the Digital Revolution

Sept. 30, 2020



Simona Rollinson,
Chief Technology Officer, ISACA



Jordan Morrow,
Global Head of Data Literacy, Qlik

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Barnes & Thornburg's Associations and Foundations Practice Group represents a wide range of non-profit organizations. We are outside counsel to more than 500 national and international professional and trade associations and societies, healthcare organizations, charities and foundations, universities and other tax-exempt organizations. We help non-profits serve their members and operate effectively and efficiently. Our value-driven approach is what you should expect in your law firm. Find out more at btlaw.com.

Boston Convention Marketing Center

Bob Pellegrini

Vice President of Sales

877-393-3393

sales@SignatureBoston.com



Known as a hub of innovation with a revolutionary spirit, Boston offers the perfect mix of history, invention and hospitality to inspire your attendees and produce event results beyond your expectations. Our two award-winning convention facilities, the Boston Convention & Exhibition Center (BCEC) and the Hynes Convention Center (Hynes), offer convenient access to the most qualified attendees within a two-hour radius in North America. Both facilities can host events of all sizes and scope, including outdoor events at The Lawn On D Powered by Citizens Bank, a vibrant, flexible, outdoor space offering two pavilions, connected to the BCEC.

Boston Convention & Exhibition Center

Built by users for users, the BCEC is minutes from Boston Logan International Airport and is the most flexible and technologically advanced convention facility in the world.

- 516,000 sq. ft. of contiguous, nearly column-free exhibit space
- 82 meeting rooms, multiple registration and function spaces, and a 40,020-sq.-ft. column-free ballroom
- Free Wi-Fi throughout, state-of-the-art digital displays, 10-gigabit fiber network and in-house IT support

Hynes Convention Center

Just 4.7 miles from Boston Logan International Airport, the Hynes is the best located major convention center in the world, located in Boston's historic Back Bay neighborhood.

- 176,480 sq. ft. of customizable exhibit space and 38 meeting rooms
- Auditorium with seating for 4,000+, and a 24,544-sq.-ft. column-free ballroom
- Free Wi-Fi throughout, state-of-the-art digital displays, 10-gigabit fiber network and in-house IT support

- Connected to over 3,100 hotel rooms and two premier shopping destinations.

DelCor Technology Solutions

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DelCor's holistic approach to IT is rooted in 35 years of helping associations and nonprofits advance their technology. Based on hundreds of strategic and enduring engagements, we developed the IT Maturity Model to help assess technology and align IT investments with business goals. DelCor is immersed in the culture and operations of the association and nonprofit community, and we remain uniquely qualified to expand clients' vision of the possibilities technology offers and partner with them to realize these possibilities for their greater success.

We wouldn't work in any other industry. We're passionate in the belief that associations and nonprofits create value for society. We know that fulfilling your organization's mission is the first, and foremost, measure of your success. So, we make your measure of success our own. Our mission, simply put, is to help your organization fulfill its mission.

As your strategic technology partner, DelCor can help move your IT maturity from a restrictive stage to an innovative one. Our services include technology assessments, IT strategy, system selection, technology project management, CIO as a Service, managed IT services, cloud migration, cybersecurity, 24/7 support, MS Office 365 and virtual event planning.

Our website at DelCor.com features a robust resources page with independent, informed insights on technology trends and topics. This includes, among others, our Reboot IT podcast, Association TechTalk video series, and educational webinars and blogs. DelCor is a proud Association Forum partner.

eShow

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eShow's full line of event management solutions provides event managers with web-based and onsite event management solutions for all event sizes—all under one umbrella. Our products include Registration Management, Housing & Travel Management, Exhibit Sales & Floor Plan Management, Mobile Apps, Event Websites, Virtual Event Management, Speaker & Session Management, Abstract & Committee Management, and much more.

When you select the eShow products that fit your needs, you tap into a powerful engine that no single-function supplier can hope to match. We have created solutions for all phases of a successful event, and we look forward to helping you build one-of-a-kind events for your attendees. eShow is the official event solutions provider for the Association Forum. For more information or to schedule a demo, visit goeshow.com.

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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.

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Louisville Tourism

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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 \$1B investment in tourism infrastructure, at the heart of which is the expanded and renovated Kentucky International Convention Center, 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."

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We are closely monitoring the COVID-19 developments and will be issuing full refunds in the event that this roundtable is canceled or postponed.



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Dustin Arnheim

Vice President of Convention Sales & Services

Visit Baltimore

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Synchronicities unites the vibrant cities of Anaheim, San Antonio and Baltimore to give meeting professionals consistent service, customized engagement, booking incentives and an opportunity to maximize ROI. We're committed to making your meetings successful as well as memorable.

Enhanced Marketing/Attendance Building In addition to customized destination marketing tools, Synchronicities works with you to identify key audiences and need areas to build attendance across the three cities.

Seamless Knowledge Transfer We share profiles, convention center reports, programs and key learnings from prior years to make your job easier. We can even send service representatives to gain firsthand experience at each of your Synchronicities meetings in preparation for the next.

Customized Welcome Program When you're in a Synchronicities city, we roll out the red carpet with an enhanced welcome program that makes attendees feel right at home. Welcome programs are customized to best fit your needs.

Financial Booking Incentives Book with Synchronicities, and a customized financial incentive package will be created to best affect your bottom line. The more cities you book, the more lucrative the financial offerings will be.

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Driven by an undeniable momentum and a powerful sense of community, Kansas City will be there when you're ready to meet in the heart of the new Midwest. Find a new energy fueled by creativity and a renewed spirit in every neighborhood. And see why the center of the country is quickly becoming the center of attention.

Kansas City has plenty of room to run with big ideas. The state-of-the-art KC Convention Center recently completed a \$150 million expansion and technology upgrade—and features 800,000 square feet of flexible meeting and event space, including 388,800 square feet of column-free exhibit space. Conveniently located in our walkable downtown, the convention center puts attendees just steps from hotels, dining and entertainment options, plus a free (and green) KC Streetcar line makes it easy to get around in style.

In Kansas City, you can anticipate vibrant breakout spaces and revamped venues. A new single terminal is coming to Kansas City International Airport in 2023. And with 34,000 hotel rooms within major brands and upscale boutiques—with more on the way—there's a spot for everyone in your group.

We can't wait to show you #HowWeDoKC. For more information, or to submit an RFP, get in touch at VisitKC.com/Meet.


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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

How Do You Balance Work and Life?

Work-life balance is extremely important to me! I make sure to schedule trips and spa days throughout the year. I go on date nights with my fiancé, spend quality time with my friends and family, read books and involve myself in anything that can be classified as "self-care." I make sure to unplug as much as I can if I am on PTO or vacation, so I can focus on myself and my loved ones. This year I want to incorporate therapy and fitness to my self-care routine. Work-life balance is essential to overall physical, mental and spiritual health.



Monae Redmond, MBA, manager of member care at Chicago Association of REALTORS®

I've had the good fortune of reporting to individuals throughout my career who stressed that my time away from the office is my own, something I repeat to myself (and my team) on a daily basis. I value this balance and am purposeful in disconnecting when I leave the office for the day by doing things I enjoy, like listening to a podcast, reading or taking a yoga class, to mentally shift gears.



Scott Brody, CAE, IOM, senior manager, professional resources, Appraisal Institute

With constant access to email, it can be difficult to achieve a work-life balance; however, it is important to maintain a healthy balance. My motto is always to work smart and play on my strengths. Understand that not every task is equally important, and it is best to accomplish fewer things and do them to the best of your ability. I prioritize my day in an attempt to categorize tasks that may be important and urgent to be accomplished first. Most importantly—take time to make time and do something that is important to you.



Donna Malert, CAE, director, governance and affiliate relations, American Academy of Orthopaedic Surgeons

This has been an ongoing question with the advent of technology that blurs the lines. To me, we each have one life to manage: our own. We all do work on personal time, as I am now, and we all take personal time at work, be it taking calls, emails, texts from family and friends, purchasing that special gift for a friend or loved one at the holidays, etc. Each of us needs to establish and respect those boundaries that make sense for us as individuals. Like riding a bike, balance is scary at first, but with experience we learn to find the right balance that helps us go faster, safely.



D. Bradley Kent, senior vice president & chief sales officer, VisitDallas



At the beginning of each year, I make a list of 20 professional goals I want to achieve. Then my wife and I make a list of 20 fun activities to complete as a family throughout the year. I write these down, pin it to a bulletin board in my office and cross off items as they are accomplished. This keeps my "to-do" list front and center and ensures that I'm able to keep things in perspective and devote the time I need to both my work life and my personal life. It also gives me something to look forward to in both areas of my life.

Brad Rysz, MBA, CAE, director of marketing & communications, Association of Nutrition & Foodservice Professionals

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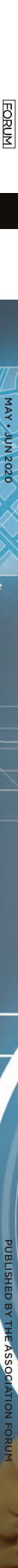


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PUBLISHED BY THE

JOURNAL

MAY • JUNE 2020

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