

JUL•AUG 2020 | V104•N4

INFORMING & INSPIRING  
TODAY'S ASSOCIATION  
PROFESSIONALS

# TAPPING INTO THE GEN NEXT

Fostering engagement  
and building  
connections with  
tomorrow's young  
professionals

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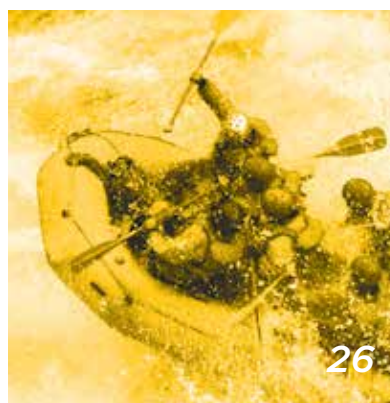
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**FORUM's** mission is to serve as an innovative resource that anticipates the needs of the association management profession.

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*"It's not the strongest of the species that survives, nor the most intelligent that survives. It is the one most adaptable to change." - Charles Darwin*

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## Let's All Breathe

"I Can't Breathe" are three words that changed the world. These are the final words spoken by George Floyd, an unarmed black man who was killed by a police officer in Minneapolis. These are the final words heard from Eric Garner, an unarmed black man who died in New York City from excessive force used by law enforcement. These despicable crimes are happening far too often. The black and brown communities cannot breathe until there is a greater level of accountability in addressing the systemic racism in America and all communities unite for a cure.

As a black female, I grieve because these words could have been spoken by my brothers, uncles, cousins and friends. These words are forever engraved in my soul, because it reminds me there is more work ahead and complacency has no place.

While this is a tense time for everyone, and there is so much raw pain and emotion, the peaceful protests are an opportunity to elevate the voices of those seeking to be heard. It is the youth who are driving the change and demanding that we uphold the words of Dr. Martin Luther King, Jr. when he said, "I have a dream that my four little children will one day live in a nation where they will not be judged by the color of their skin, but by the content of their character."

Let's open our minds and hearts as we start to reopen our world. Please use this as an opportunity to have deep and meaningful conversations with someone from a different race or ethnic background. Someone with whom you wouldn't normally associate. Seek to authentically understand their journey and path. How did it shape their life? Be consistent in your compassion to develop a meaningful connection. Let's move from not breathing to breathing together.

How do we breathe? People want change and action. It is a systematic approach. Let's move from protesting to voting for policy change. Let's move from statements to action. This isn't a black or white issue or a partisan issue. It is a humanity issue. We are all created equal and want to be treated fairly. We want a welcoming environment. An environment that creates 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.

Bias, discrimination and racism have no place at Association Forum. We represent association professionals from all backgrounds who are committed to advancing the practice of association management in their industries and to social justice for all. We are committed to uniting with our members to be agents of change and unity. Let's use this moment as an opportunity to hear, heal and help. It is time to change the narrative and uplift the conversations for a united and peaceful tomorrow. We know the problems. Let's unite on solutions. Let's all breathe. **F**

A handwritten signature in black ink that reads "Michelle". The script is fluid and cursive.



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

## Be a Welcoming Environment

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

## Embrace Innovation and Quality

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

## Have Fun and Stay Positive

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

## Open and Honest Communication and Teamwork

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

## Accountability—Own It

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

## Win with Integrity

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

Como parte dos esforços de oferecer aos nossos membros um Welcoming Environment®, ou seja, um ambiente acolhedor, providenciamos uma versão em português dos nossos Valores fundamentais traduzida pela Interpro Translation Solutions, Inc.

## Ser um ambiente acolhedor

Somos um ambiente acolhedor que busca ativamente formas de beneficiar a comunidade ao reconhecer que o todo é sempre maior do que a soma das partes. Faremos o possível para que todos se sintam acolhidos, representados, engajados, inspirados e capacitados ao interagir conosco.

## Abraçar a inovação e a qualidade

Adoramos testar novas ideias e buscamos inspiração dentro e fora da comunidade da nossa associação. Valorizamos todas as melhorias, sejam elas grandes ou pequenas. Incentivamos e comemoramos experimentos com novos avanços, no entanto, sabemos o melhor momento para interrompê-los. Nosso objetivo é manter a melhoria contínua.

## Manter o pensamento positivo e se divertir

Muitas vezes, passamos mais tempo com nossos colegas de trabalho do que com a nossa própria família. Por esse motivo, fazemos o possível para tornar nosso ambiente de trabalho mais divertido, positivo e bom para se trabalhar de maneira geral.

## Comunicação honesta e aberta e trabalho em equipe

Não podemos trabalhar com informações que não temos. A comunicação eficaz é a chave. Devemos cultivar um ambiente em que possamos falar de maneira aberta e honesta com o intuito de crescer como equipe. A sinceridade deve ser abraçada e valorizada. Trabalharemos de maneira colaborativa para agregar valor aos nossos membros.

## A minha, a sua, a nossa responsabilidade

Assumimos nossas responsabilidades e esperamos que as pessoas tirem dúvidas e levantem questões de maneira respeitosa. Como o nosso trabalho exige colaboração e equipes interdependentes, confiamos e dependemos uns dos outros para melhorar nossa capacidade de resposta e prestar serviços de alto nível e qualidade às nossas partes interessadas.

## Vencer com integridade

A ética é uma parte fundamental da nossa operação, o que contribui para que nosso tempo, nossos talentos e nossa experiência promovam avanços nas comunidades onde trabalhamos e vivemos. Nosso compromisso é ampliar a nossa associação de formas que beneficiem o nosso ambiente e a sociedade.

# Embracing the Power of Pessimism and Learning

Excessive and unfounded optimism is not the best way to prepare for the pandemic-related challenges that associations will face in the months and years ahead.

An alternative and more appropriate mindset for these uncertain times is “short-term pessimism with long-term learning,” said Jeff De Cagna FRSA FASAE, executive advisor for Foresight First LLC, during the Association Forum webinar, “Developing Your Association’s COVID-19 Scenarios of the Future.”

Short-term pessimism means coming to terms with the fact

that things will never go back to pre-pandemic “normal” again and there will be no business-as-usual going forward. As for taking the long view, association decision-makers must let go of their deep-seated orthodox beliefs — beliefs that some associations have already had to reevaluate. Examples include:

- Associations need bureaucracy to get their work done.
- Associations need to have large in-person conventions.
- Boards and task forces must meet face-to-face.

Said De Cagna, “The COVID-19 pandemic is an inflection point for the entire

world, but the reinvention of associations won’t happen on its own; it will require an intentional and sustained learning effort.”

## PREPARE FOR THE FUTURE.

Learn more about cultivating a future-focused mindset and hear all of De Cagna’s valuable advice in Forum’s Online Learning library at [pathlms.com/association-forum/courses/17420](https://pathlms.com/association-forum/courses/17420).

When asked which of the two ways of thinking is harder for their board to adopt, 56% of 80 attendees answered “taking the long view” and 44% answered “the pessimistic mindset.”

56%



TAKING THE LONG VIEW

44%

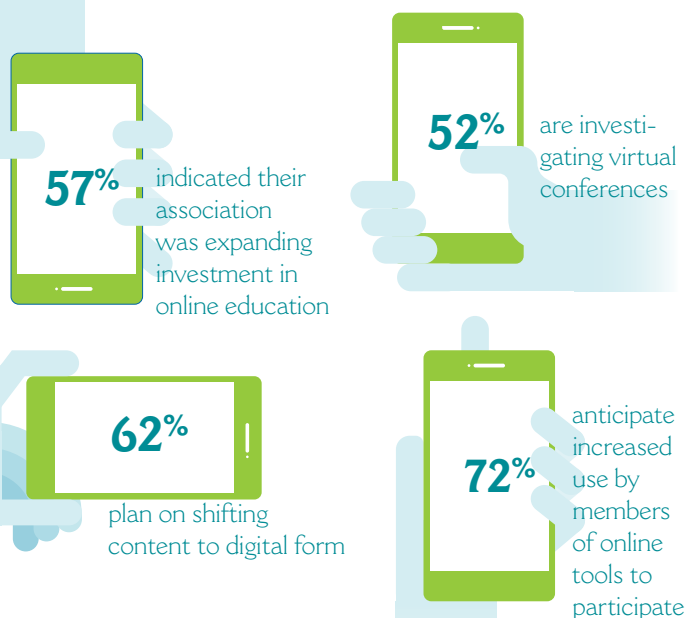


PESSIMISTIC MINDSET



# Expanding Online Relationships

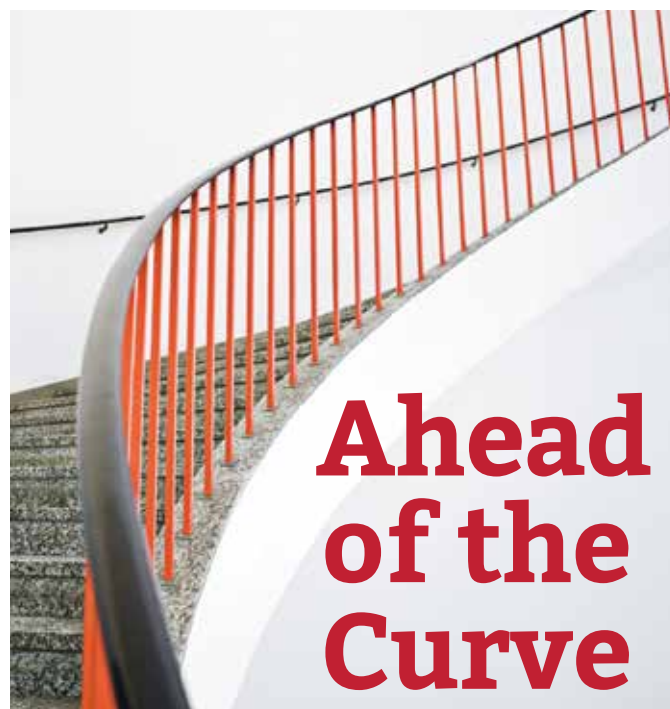
Leaders from more than 1,000 associations — including Association Forum — offered their plans and projections in the face of the pandemic for Association Laboratory's "The Strategic and Economic Impact of COVID-19 on Associations" report. Conducted in late March, the survey revealed the community's desire to expand online member relationships. Of responding association leaders:



As cancellations have increased and associations continue navigating their options, the report offered key considerations "to inform the development of goals, strategy and the eventual digital membership value proposition":

- **Include Diverse Voices.** How do you incorporate the diverse voices of critical audiences (within resources) into your strategy so that they are embraced by leaders and members within the profession?
- **Validate Decision-Drivers.** What are the motivators influencing decisions and the features of a digital membership with the greatest influence on the decision to join?
- **Configure and Price Wisely.** What is the optimal configuration and pricing strategy for a new or revised digital membership that meets the association's mission-based and business objectives?
- **Test.** How does the association conduct a pilot test so that the conclusions identified in the research stage can be validated in the real world?

SOURCE: Association Laboratory Inc., "The Strategic and Economic Impact of COVID-19 on Associations"



## Ahead of the Curve

The value of education can't be overstated — especially in uncertain times. Whether for members and volunteers or your own leadership team, lifelong learning brings a variety of benefits, such as making you more adaptable in response to change and more accepting of risk. Learning, openness and curiosity all can have a positive impact on your health and boost confidence and self-esteem.

If you're looking to refresh your educational offerings, Association Forum's Professional Practice Statement "Lifelong Learning and Association Professionals and Volunteers," offers plenty of valuable ideas. Here are just a few that are featured:

- Prioritize learning and make learning a part of a normal routine. Constantly read, watch and listen. Publications, in-person and online education, webinars, podcasts and other learning platforms and technology tools are excellent resources for insight, trends, issues and challenges affecting the association field and can help individuals grow and develop as professionals.
- Create and review an annual Professional Development Learning Plan as part of your association's annual goal-setting process. Engage supervisors in a discussion around the individual's organizational development needs and gain agreement on a learning plan.
- Seek those who hold opposing viewpoints and engage in civil debate. Encourage them to explain and defend their position in order to better understand the varied ways that issues affect the community.

**LEARN MORE.** To read the full statement, including the section on professional practices for the governing body, visit [associationforum.org/browse/practice-statements](https://associationforum.org/browse/practice-statements).

# Examining the Rules

## EMPLOYMENT POLICIES IN THE TIME OF COVID-19

BY KIMBERLY PENDO

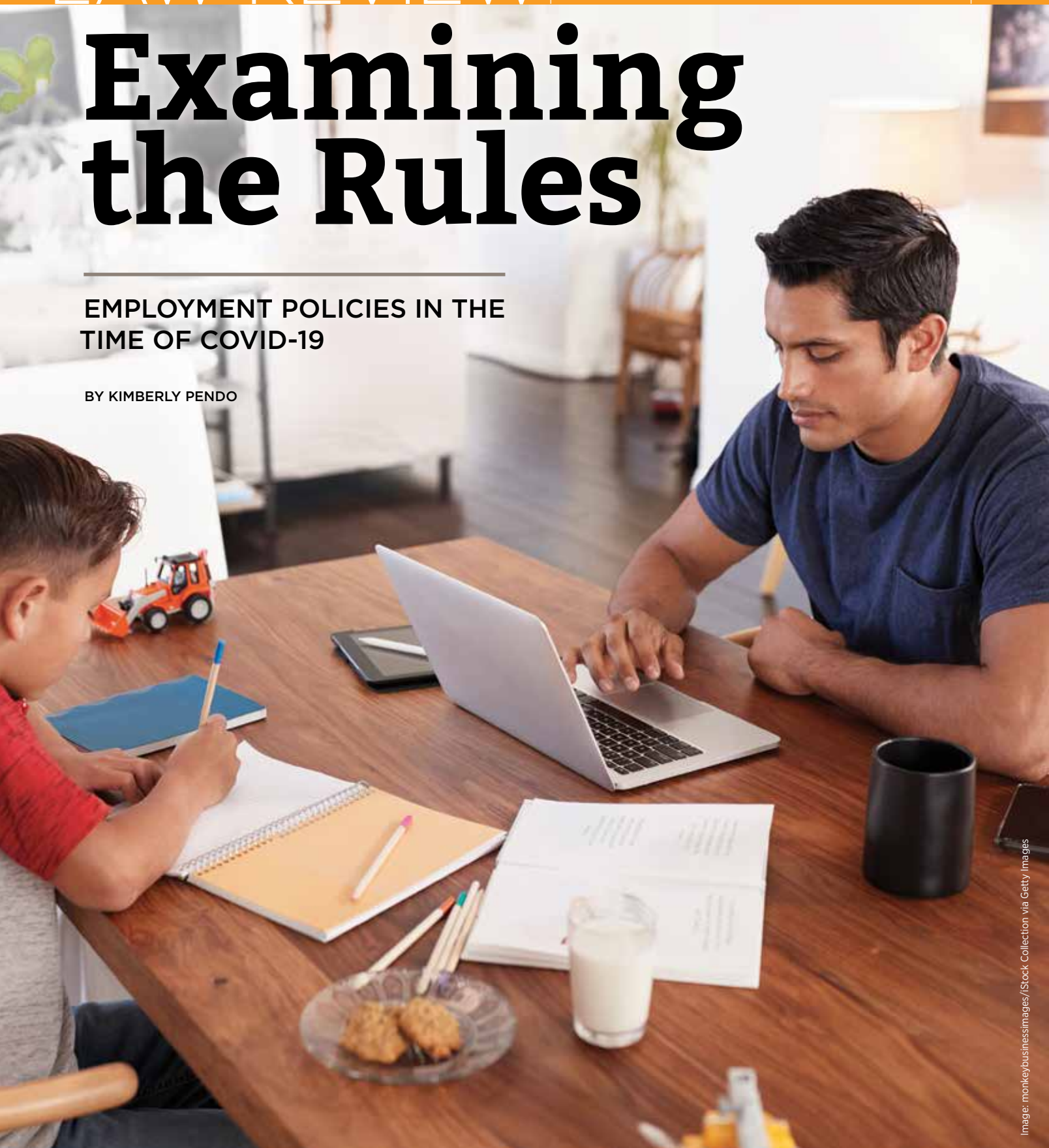


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## **Q: What are some of the workplace policies I need to consider in light of the COVID-19 crisis?**

**A:** To respond to the legal and practical impacts of the COVID-19 pandemic, many associations will need to modify and add to their workplace policies. For example, the recently adopted Families First Coronavirus Relief Act requires employers with fewer than 500 employees (including associations) to provide their employees with paid sick leave under the Emergency Paid Sick Leave Act (Sick Leave Act) and paid family leave under the Emergency Family and Medical Leave Expansion Act (Family Leave Act) through Dec. 31, 2020. In addition, recent Occupational Safety and Health Administration (OSHA) recommendations and state and local stay-at-home orders have made it a practical necessity to implement policies outlining new workplace protocols and protections.

Adoption and implementation of the following policy revisions and additions should help associations meet their legal obligations as employers while providing their employees with the guidance they need to navigate the workplace changes brought on by the pandemic.

### **Leave Policies**

In addition to examining the adequacy of existing sick leave policies, associations with fewer than 500 employees should adopt policies that include the temporary paid leave benefits required by the new legislation. The Sick Leave Act requires employers to grant two weeks of emergency sick leave to employees who cannot work due to: (i) a COVID-19-related federal, state, or local quarantine or isolation order; (ii) self-quarantine upon the advice of a healthcare provider based on COVID-19 concerns; (iii) the existence of COVID-19 symptoms for which a medical diagnosis is being sought; (iv) an obligation to care for a family member for one of the aforementioned reasons; or (v) an obligation to care for a child whose school or childcare has closed or is unavailable because of COVID-19. Employees who take sick leave for their

own illness or quarantine are eligible for up to 80 hours of leave at their regular rate of pay, but not more than \$511/day or a total of \$5,110. Those who take leave to care for a child or other family member are eligible for two-thirds of their regular rate of pay, up to a maximum of \$200/day or a total of \$2,000.

Adopted as a complement to the Sick Leave Act, the Family Leave Act requires associations to provide employees with up to 10 additional weeks (i.e., 12 total weeks) of paid leave due to COVID-19 issues. Employees are eligible for Family Leave Act benefits if they are unable to work because of a bona fide need to care for a child whose school or care provider is unavailable due to COVID-19. Under the Family Leave Act, employees taking leave receive two-thirds of their regular rate of pay, up to \$200/day and a maximum of \$10,000.

In limited circumstances, associations with fewer than 50 employees may be able to claim an exemption from the requirement to provide leave requested due to school closings or child care unavailability under the Sick Leave Act and/or Family Leave Act if the leave requirements would jeopardize the viability of the business as a growing concern. To do so, an authorized officer of the association must document that providing leave to an employee will (i) cause the association's expenses and other financial obligations to exceed available business revenue and cause the organization to cease operating at a minimal capacity; (ii) pose a substantial risk to the organization's finances or operational capacity because of the employee's specialized skills, knowledge of the business or responsibilities; or (iii) place the association in a position in which it does not have sufficient other workers who are able, willing and qualified, and who will be available at the time and place needed, to perform the labor or services provided by the employee requesting

leave, and these services and labor are needed to operate at a minimal capacity. There is no affirmative duty to send such documentation to the Department of Labor (DOL), but associations that claim the exemption should carefully review the regulations to determine the specific records required to verify eligibility.

### Work-from-Home Policies

Statewide stay-at-home orders have forced associations, by necessity, to embrace broader — if not wholly new — work-from-home policies. Even as some employees have returned to offices over the past few months, large numbers continue to work remotely. In addition, a new surge in COVID-19 cases is possible and, with it, a new array of stay-at-home orders. Thus, associations should revisit existing work-from-home policies to ensure the terms provide clarity on eligibility, expectations, compensation, work hours, workspaces, equipment and services (including expense reimbursement), use of PTO, communication and evaluations. If not already included, it would be a good time to add an “emergency” provision that grants the association discretion to alter policy requirements temporarily (e.g., expanding work-from-home eligibility or providing “flex-time”).

### Infectious Disease Prevention and Response Policies

Given the ease of transmission associated with COVID-19, associations should consider adopting an infectious disease policy designed to comply with OSHA’s General Duty Clause (i.e., the duty to provide a workplace free from recognized hazards). The policy should incorporate both local requirements (e.g., use of face masks and social distancing) and practical strategies (e.g., prohibiting in-person meetings) for preventing infectious disease transmission. Such policies also should establish measures for reducing transmission, identifying and isolating sick employees, and notifying employees and family members of a potential exposure


(e.g., regular cleaning of frequently used surfaces, daily temperature-taking, maintaining current emergency contact information). One challenge with respect to these policies will be striking the appropriate balance between sharing important employee health information and maintaining employee privacy.

### Travel Policies

Associations also should review and revise their travel policies to confirm that they reserve the right, subject to guidance published by the U.S. Centers for Disease Control (CDC) or other governmental authority, to curtail or otherwise severely reduce employee business travel, including travel for professional development (e.g., conferences). In addition, travel policies should notify employees of the potential for additional personal restrictions, such as temporary work-from-home requirements following travel to or from certain regions. Finally, associations should consider providing guidance to their employees on their use of public transportation.

### Other Recommendations

- Implement procedures to stay abreast of federal, state and local public health recommendations.
- Coordinate with benefit providers to advise employees about available resources (e.g., telemedicine options).
- Assess work level and schedule changes with tax professionals and legal counsel, as hour reductions and furloughs can affect employees’ insurance, compensation, benefits and even immigration status.

Associations should adopt workplace policies that not only provide flexibility in responding to the changing circumstances of COVID-19, but also comply with federal and state law and public health recommendations. Doing so will protect employees while limiting uncertainty and the risks of harm and/or liability. Remember to consult with counsel to ensure that policies are drafted and implemented in a nondiscriminatory manner consistent with applicable federal, state and local laws. 



**KIMBERLY A.  
PENDO, JD**

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CHICAGO LAW  
PARTNERS, LLC

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



Despite undeniable struggles and uncertainty, associations are proving this new era can be a time of innovation, fine-tuning and progress. Read ahead for ideas and inspiration as your association moves forward.



## PREPARING FOR TOMORROW

“Gen Z is on track to become the most educated generation yet and is looking to continue that learning and career development.”

Tapping into the Next Gen, *pg. 14*

“There has never been a greater need for organizations to become master listeners.”

Finding Your Balance, *pg. 20*


“Get creative and plan ahead — what opportunities do you have to involve your sponsors and exhibitors in the virtual space?”

Ready for Anything, *pg. 26*

# TAPPING INTO THE NEXT GEN







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## Fostering engagement and building connections with tomorrow's young professionals

*By Chasity Cooper*

For most people, 2020 certainly will be a year to remember. The global COVID-19 pandemic has upended life as we know it. Specifically, for the graduating class of 2020, this year will be remembered as a time when classrooms turned into daily Zoom conference calls, major social events and celebrations were postponed indefinitely, and final assignments were (quite possibly) accepted in the form of YouTube or TikTok videos.

For those gearing up to enter the workforce, the economic climate is uncertain, at best. It's no longer business as usual. Since March, the pandemic has left many companies and organizations with more questions than answers about the future of their operations. Senior-level management teams have had to make unfortunate layoffs and budget cuts, forcing them to reinvent processes with their leaner teams. If young professionals are fortunate enough to gain employment, they will likely be onboarded courtesy of Microsoft Teams or Skype, as managers and human resources teams continue to adhere to strict guidelines of social distancing.

**“While recruitment is crucial, we’ve shifted our focus to more student engagement.”**

—KARI NATALE, CAE, ICPAS

Pandemic aside, connecting with Generation Z (those individuals born between 1996 and 2012) is paramount, as this cohort is the most diverse and largest in the United States — making up more than 25% of the population, according to a 2018 study conducted by Deloitte. The first generation to never know a world without the internet, Gen Zers are tech-savvy and entrepreneurial, and they highly value diversity and inclusion. They also prioritize financial security, having witnessed their parents' experiences during the Great Recession.

One particular area of opportunity for associations when it comes to the next generation is education. Gen Z is on track to become the most educated generation yet and is looking to continue that learning and career development. The Deloitte study showed that Gen Z “will be more drawn to organizations that focus on investment in learning and skill/capability development,” an attribute associations should note.

For associations eager to recruit and maintain members of this next generation, run a quick scan of your organizational offerings and ask these questions: In what ways can we learn from young professionals? How can we empower them as professionals? What areas of our organization need to be revitalized (or eliminated)? How can young professionals help us reach our goals? How can we be innovative in our educational offerings? How can we emphasize the benefits of membership, knowing the values of younger generations?

Since hosting events and conferences has been put on pause for the time being, associations can and should get creative to effectively foster a deeper connection with their young professional members. Through online educational resources, webinars and scholarship opportunities, associations with a solid next-generation membership base can choose to reiterate the importance of their organization's mission and pivot their outreach initiatives in order to meet the needs of students and young professionals at this time. Associations focused on lifelong learning and demonstrating their membership value are already successfully doing this.

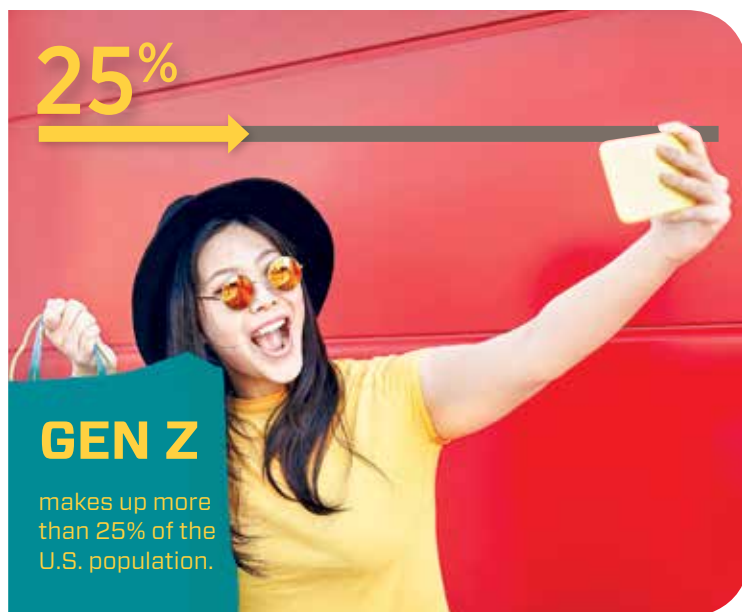
## Recruit and Engage

For almost a decade, Kari Natale, CAE, has worked to “pave the way for tomorrow's CPAs.” As senior director of both the CPA Endowment Fund of Illinois and planning & governance at the Illinois CPA Society (ICPAS), she oversees the pipeline and diversity initiatives that focus on future generations of CPAs.

“I am responsible for recruiting and engaging student members,” says Natale. “My team members manage our programs and resources for students and conduct campus outreach.” With 2,500 student members across 35 campuses, ICPAS counts on student ambassadors and accounting faculty to help with recruiting efforts. Unlike many associations, ICPAS offers free membership to students and shares valuable educational resources during campus visits. They made the decision to stop charging students a small fee several years ago because it was a barrier to entry for many.

“While recruitment is crucial, we've shifted our focus to more student engagement,” says Natale. “When we get in front of students, we will talk about hot topics not directly related to accounting — like how to improve your LinkedIn profile — and then tie back the work we do to help them throughout their career.” On some visits, Natale's team will also bring young accounting professionals who are alumni of the college to share their experience with current accounting students.

After a student graduates, they receive a complimentary one-year membership, and then they can choose to continue their membership as a working professional. The ICPAS Young Professionals Group (YPG) provides opportunities for these members to develop leadership skills that will enable them to stand out in their career, gain credibility and make those all-important connections. “Many of our young professionals will go on to work for the large accounting firms that support the Society's efforts and will pay for their membership,” says Kristin McGill, CAE, senior director of membership for ICPAS. McGill has



been with ICPAS for four-and-a-half years, and her position is quite different from a typical membership role. “In addition to membership recruitment and retention, we also oversee our young professional and women’s initiatives, as well as outreach to public accounting firms, corporate finance members and chapters,” she says.

Currently, ICPAS has more than 23,000 members, with 4,500 of those members being young professionals. ICPAS is an organization focused on serving the needs of certified public accountants, those who are pursuing a CPA, as well as non-CPAs working in accounting and finance.

While networking is a major draw for new association members and the YPG, this is a perk that has to be reimagined as conferences and events across the country have been canceled or postponed. Normally, ICPAS hosts quarterly events like happy hours and other networking events for young professionals, new members and new CPAs. However, several of those are being postponed or moved to a virtual setting. Their Young Professionals Leadership Conference, which is the premier event for young accounting and finance professionals and attracts 250 attendees, was scheduled for August and has recently been changed to a virtual event.

“Right now, we’re encouraging our members to connect via our online community and take advantage of on-demand webinars, conference simulcasts and COVID-19 resources on our website, all of which can be accessed at their convenience,” McGill says.

## Careers and Community

The Institute for Real Estate Management (IREM) has been very active in engaging young professionals not just in the United States, but across the globe. With 80 domestic chapters and 17 international chapters, IREM works with 36 academic institutions with property management and real estate programs to provide textbooks and curriculum support at no additional cost. “We’ve recognized a need for students and young professionals, and work to create space for them as they grow in the industry,” says Eileen Patton, who serves as manager of academic and next-gen engagement at IREM. Recently, IREM collaborated with 30 other commercial real estate organizations to create Careers Building Communities, a website that highlights the various careers within the industry. “With the website, we want to bring awareness not only to real estate management, but to other occupations that support commercial real estate like landscaping, architecture, finance management and development,” Patton says. “It’s a great entry point for

students to figure out what opportunities are available outside of just selling property.”

For a one-time fee of \$50, IREM student members have full access to all IREM online resources, educational

courses, events and other benefits as long as they’re enrolled full-time at a college or university, and that membership lasts until they graduate. Their membership also allows them to connect with IREM on both the local and national levels.

“The membership program is a great opportunity for students to have that first entrance into the professional setting while they’re still taking their classes and getting their degree,” says Patton.

In her role as CEO and executive vice president at IREM, one of Denise LeDuc Froemming’s priorities is to ensure that Patton and her team are supported in providing students and young professionals with the tools they need to succeed. “When I speak publicly to our industry partners and members, I am always letting them know about the wealth of opportunities we have for students,” Froemming, a CAE, says. “Our responsibility is to ultimately move forward IREM’s strategic plan: engaging and empowering the next-generation workforce and identifying what we can do to create those pathways and opportunities.”

In addition to developing curriculum and work with its global chapters to provide internships, job opportunities and mentorship, IREM spotlights students and young professionals within their broader community through two unique initiatives: Student of the Year and 30 Under 30.

The Student of the Year program, which is application-based, recognizes a full-time college student for academic achievement with aspirations and career goals in real estate management. The winner receives an all-expenses paid trip to the IREM Global Summit — online this year — and will be recognized at an awards ceremony during the conference. “IREM works with many of its partner academic institutions with property management programs to offer scholarships for other students to attend the Global Summit,” says Patton. “It’s a wonderful experience for students to connect with property management professionals and build relationships with future mentors.”

**“The membership program is a great opportunity for students to have that first entrance into the professional setting while they’re still taking their classes and getting their degree.”**

—EILEEN PATTON, IREM





**The first generation to never know a world without the internet, Gen Zers are tech-savvy and entrepreneurial, and they highly value diversity and inclusion.**



Many IREM members are mentors to young professional members and help them to get connected to projects within their community. “Our approach is top down, because we believe it provides an opportunity for more powerful connections,” says Froemming. “Together, we’re able to connect and leverage each other’s strengths.”

In addition, IREM’s 30 Under 30 program acknowledges the next generation of real estate management leaders. Each year, the program highlights 30 young professionals who have already made significant impact on the industry and in their communities. Patton also serves as liaison for two boards that touch the young professional/next-gen group — both of which take a strategic, holistic view of the real estate management profession and how IREM can create a pathway for recent grads.

## Answering the Call

In light of COVID-19, both ICPAS and IREM have stepped up to the plate to provide extra support for their student and young professional members.

“We realized that colleges statewide were starting to shut down, and students were going to have to attend

virtual classes, and a lot of accounting students don’t have access to good laptops,” says Natale. “It’s hard to complete your spring semester when you are sharing laptops with roommates, siblings and parents, or were relying on school or public libraries to have access to a computer and now have nothing. We were hearing from a lot of students that they were afraid they weren’t going to be able to complete the semester.” ICPAS took action and launched an emergency laptop scholarship for students who didn’t have a computer of their own to use. “We had 216 students apply, which showed that there was an overwhelming need. We were originally going to give away five scholarships, but we got approval from our board to give away 16.”

IREM has created a coronavirus response team and has made most of their live courses virtual and free. “Our priority right now is to provide vital information from the front lines for our property managers,” Froemming says. “We’ve had to pivot quickly to offer resources for those on the ground so that they can immediately put them into practice.”

With so many in-person events canceled or postponed, both organizations are increasing their online activity to keep members engaged and encouraged.



**Gen Z is on track to become the most educated generation yet and is looking to continue that learning and career development.**



Both offer the lesson that now, more than ever, an opportunity exists to authentically connect with the next generation of leaders and put your association in a position to succeed in the future. ICPAS and IREM are two organizations that not only adapted quickly but also are thinking ahead to better serve student and young professional members.

Despite social distancing, economic downturns and fears, passionate students and young professionals are still out there, eagerly and boldly pursuing their careers. And, as these associations have proven, it is the perfect time to embrace that. [F](#)

CHASITY COOPER IS A CHICAGO-BASED WRITER AND EDITOR.

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**KARI NATALE, CAE**

ICPAS



**EILEEN PATTON**

IREM



**DENISE LEDUC FROEMMING, CAE**

IREM



**KRISTIN MCGILL, CAE**

ICPAS





# FINDING YOUR BALANCE



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## Membership in the age of coronavirus

*By Amy Thomasson*

**W**hile many associations have been forced to shut their physical doors, they are focused on finding the key to unlock new avenues

of value creation in times of crisis. Associations must straddle the line between continuing business operations and being sensitive to the current environment, as well as the line between appropriate communication tenor and volume.

How can we achieve this delicate balance when we can't even see the tightrope? In this interview, strategist Lowell Aplebaum, FASAE, CAE, CPF, offers guidance on how to forge a path forward during these uncertain times, as well as important questions every association should be asking right now. Aplebaum is the CEO and strategy catalyst



of Vista Cova, a company that partners with organizations on strategic visioning and planning. He is a facilitator, connector and expert on the needs, challenges and opportunities present across the spectrum of the association landscape.



## **FORUM: What recommendations do you have for associations seeking to remain relevant and find new ways to provide value?**

**Aplebaum:** There has never been a greater need for organizations to become master listeners. What information flowing from government and health agencies directly impacts your members? What are the greatest challenges emerging daily that your members are facing — and are you hearing it from their perspective? What are the challenges the industry is facing? And, of your solution partners, why are they concerned for their customer base and what is keeping them up at night?

When this moment started, many were seeking as much information as they could get as quickly as they could get it. The need for a quick turnaround on what is happening has not diminished — but it is once again turning to quality over quantity. We can fill our days with webcasts, news updates and Zoom meetings, but what is going to be the most valuable use of time for what we need? Which headlines have the biggest impact on the industry, and what action needs to be taken? How is all the information your association is collecting curated for easy access by the end user? Consider prioritizing resources based on value rather than just throwing everything onto a web page where the new replaces the old.

In this moment of pivot, more than ever, associations need to not be the Google search function for COVID-19, but the “page one of results” — curating the most relevant and helpful.

## **FORUM: What standard practices should associations be stopping or altering in the wake of COVID-19?**

**Aplebaum:** In this moment in time, how well do you know the resources your members have? Has their business been impacted and are they cash-low? Are they in the trenches where they cannot isolate and are surrounded by the risk of COVID-19 each day? Are they working from home while home-schooling, and is their time capacity reduced?

With the best-projected picture of what resources they have at hand, what are the

## **IGNITE THE RESTART**

While COVID-19 has caused hardships and unprecedented challenges, this crisis has also proven that associations are

more vital than ever before. As this community continues to weather the storm, Association Forum is committed to supporting the industry every step of the way.

Our COVID-19 resource page, Ignite the Restart, has an abundance of information to keep our members pushing forward. Along with webinars, advocacy efforts and pertinent *FORUM* Magazine articles, you'll find inspiration from other member associations and the ways they have become involved in recovery efforts and increased their member value. Below are two impressive examples:

- In addition to providing news, tips and a members-only report, “COVID-19: Pathways to Recovery,” the American Hospital Association (AHA) has expanded the West Coast-based Providence health system’s “100 Million Mask Challenge” to provide personal protective equipment (PPE) for health and hospital professionals nationwide. Along with providing this essential equipment, this AHA campaign has gathered resources on recruiting volunteers, healthcare worker-specific discounts and other ways to unburden these essential workers and members.
- Committed to serving both the medical community and its patients, the American Medical Association (AMA) has provided numerous resources on their advocacy and mission, a checklist on how to safely reopen a physician’s practice and a wealth of knowledge in the *Journal of the American Medical Association (JAMA)*. AMA has also compiled the “Physician’s Guide to COVID-19,” which features evidence-based research and data for AMA members’ easy reference.

/// **Learn more about our efforts.** Visit the Ignite the Restart resource page at [associationforum.org/browse/coronavirus](https://associationforum.org/browse/coronavirus) for more inspiration and ways to get involved.



top things they need at this moment? Not the nice-to-haves — the need-to-haves — where your organization is the best fit to provide it? Translation of legislation that will impact their daily work? Connection to colleagues who speak their language and with whom they can talk about what they are experiencing? Come up with that top five or top 10 list — and put all else on the back burner for maintenance but not emphasis. That list should not be static; it should be dynamic, ever-updated and prioritized to reflect the member perspective as you hear what is happening on the ground and get feedback on the solutions and experiences you are producing.

### **FORUM: How can associations continue to keep members engaged during these uncertain times?**

**Aplebaum:** I know this may sound trite, but do the above. At this moment, marketing isn't about selling. It is communicating the tangible, real-time value that comes with affiliation that eases the burden and hardship of living in isolation during a pandemic and potential economic downturn. Engagement will come from demonstrating that you are actively seeking the member perspective and are on the forefront of offering the knowledge, information, community and experiences that are unique and needed in this unprecedented time.

While it isn't an "if you build it, they will come" moment exactly, it may not be far from the truth. With that said, the real question is how we keep members engaged after the crisis. Our organizations are demonstrating the ability to quickly pivot and create the solutions our members need in real time. If, after this moment of crisis has passed, we return to doing the same things we have always done instead of learning from this moment of forced innovation, I think the value our members are finding today will be temporary, as will their affiliation.

### **FORUM: What are your thoughts on gated (members-only) content vs. free content during times of crisis?**


**Aplebaum:** Though our organizations are member-based, most of the time the messaging I hear from an organization is that they are the voice of the industry. I think this is a pivotal moment for all our organizations. If we want to be able to say that we are the professional home for an industry, we need to adjust based on crisis.

Most organizations seem to be providing free content to their industries at this moment. The industry

includes your members, your past members, your potential members and even your "never members."

Associations providing the right meaningful value are seeing past members, who can afford to do so, come back; members renew; and those who never joined or even knew about the association come through the doors for the first time.

One model is to provide resources to members first and then release them to others. Another model is to make resources available to everyone, but the community discussions are only available to members. At the end of the day, there is no one answer that is right for everyone. I would ask you to consider: Who are we? If we exist to impact society by how we represent an industry, then in this moment of crisis, we need to represent the whole industry.

One final point: If an organization is creating value beyond posts on a web page, they should be capturing the contact information for those who are accessing the resources. Registering the number of hits or downloads is great for tracking trends, but useless for following up once the crisis has passed. 

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

**CONSIDER YOUR STRATEGY.**  
Read more about gated vs. free content in the **FORUM** web exclusive at [forummagazine.org](http://forummagazine.org).

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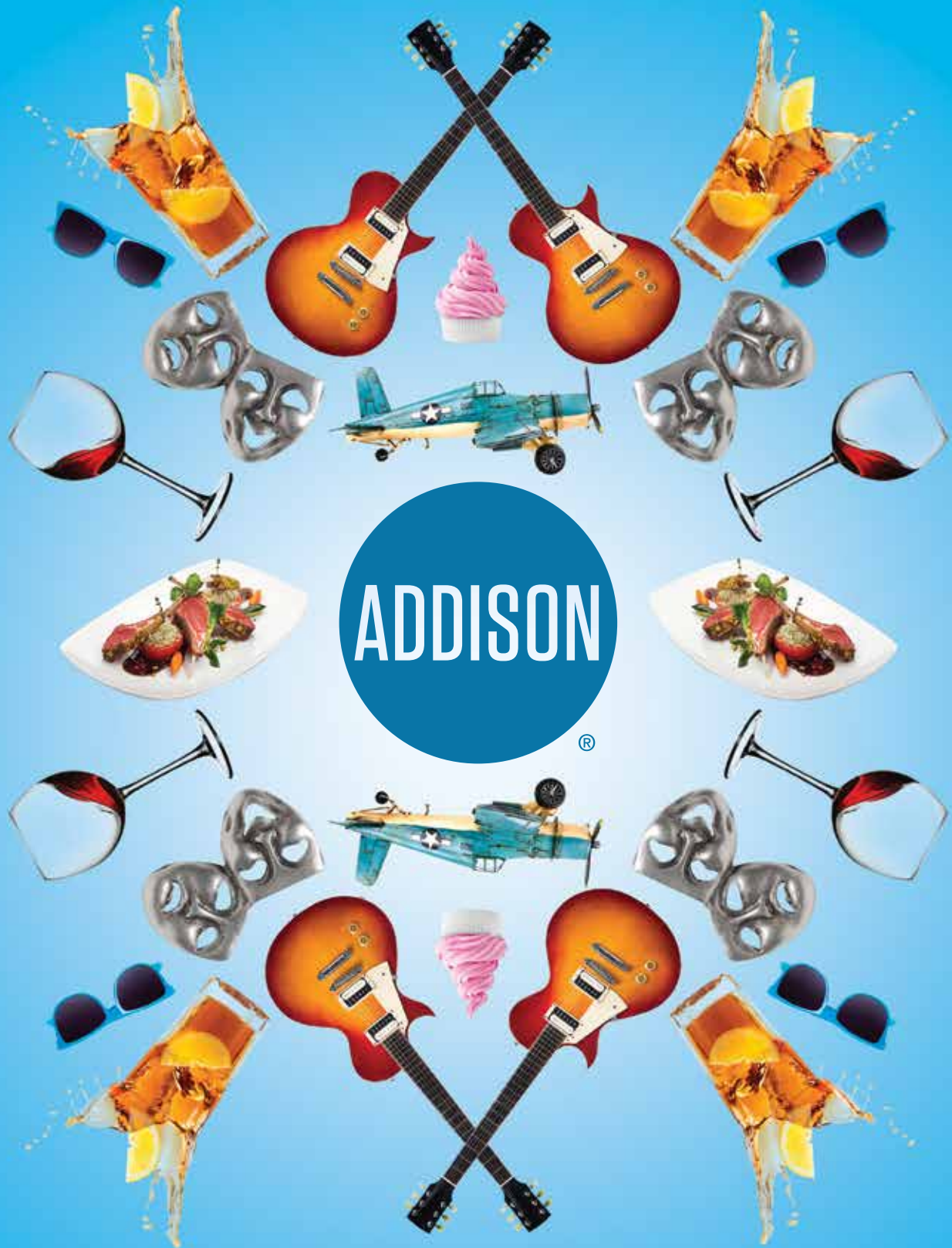
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# READY FOR ANYTHING



Attendees gather at HOPA Ahead 2020, which took place before Florida's stay-at-home order was issued.

Thanks to teamwork and quick pivots, HOPA kept its conference afloat amidst COVID-19

*By Emma Clawson*





**T**heodore Roosevelt may have said it best when he declared, “Do what you can, with what you have, where you are.” These wise words were certainly put into action by the Hematology/Oncology Pharmacy Association (HOPA)

earlier this year. Every spring, HOPA hosts its annual conference, HOPA Ahead. As an association of healthcare professionals, we were aware of and monitoring the COVID-19 epidemic long before it hit the United States. What we didn’t anticipate, however, was the sudden, powerful impact it would have on our conference.

The meeting was planned for March 11–14, before a stay-at-home order was issued in Florida. During the course of the four-day meeting, HOPA Ahead 2020 was slated to present 37 educational sessions featuring 78 different speakers. We were on track to have record attendance, with registration numbers approaching 1,300 live and 200 virtual attendees. But, a week and a half before the meeting, the news of a rapidly increasing number of positive COVID-19 test results in the U.S. spurred a chain reaction. Academic institutions, medical centers and pharmaceutical companies began imposing institution-wide travel bans, inhibiting speakers from traveling to Tampa, Florida, for the event. Five days before the conference, 17 of our 78 speakers were affected by travel bans; just three days later, that number had nearly tripled.

So, what do you do when a pandemic wreaks havoc on your event just days before it begins?

Cry?

Panic?

Roll up your sleeves, and just “figure it out”?

In my experience, it was all of the above.

## The Plan

With fewer than three days until our opening session, and determined to serve our members, our team sprang into action to keep the conference moving forward. Our first step was figuring out how to keep our promise to provide 37 sessions’ worth of continuing education (CE) when 80% of those sessions had at least one speaker who was unable



# 5 TIPS

## FOR QUICKLY TRANSFORMING YOUR MEETING

After having time to reflect, the meetings team at the Hematology/Oncology Pharmacy Association (HOPA) has come up with some tips for delivering a conference during a crisis:

**1 Don't reinvent the wheel.** So many virtual meeting platforms you may already use (e.g., GoToMeeting, Zoom, etc.) have capabilities built in that can be used for virtual presentations. Features such as mouse control, screen sharing and chat functionality can be used to maximize your attendee and virtual presenter experience.

**2 Conference apps aren't just for live attendees.** Sure, apps are great for attendees to build their schedule and read speaker bios, but if your app has the capability for attendees to submit questions to the speakers, it doesn't matter if that happens live in the session room or virtually from across the country. We used our app's Q&A feature to pull in questions from both our live and virtual attendees, so our speakers were able to address everyone's questions for an interactive experience.

**3 Educational sessions aren't the only things that can be virtual.** HOPA Ahead features close to 300 completed, late-breaking and trainee research posters every year. With dozens of poster presenters unable to travel to the event, we used our conference website to post electronic versions of the research posters online for all attendees to see. Attendees could not only view the posters, but also reach out to the poster presenters with questions or feedback on their projects.

**4 Lean on your vendors.** Chances are, you aren't the only client who has dealt with a similar situation, so utilize the expertise of your vendors who have gone through this. Explain your hopes, needs and budget, and then see what the experts suggest. You don't need to carry this load by yourself!

**5 Relax.** This situation is out of your control. You can't control a pandemic. You can't control a natural disaster. What you can control is how you approach the solution. Lean on your team members for ideas and support. In times like these, there's no such thing as a bad idea.

to attend in person. Looking to our existing technology, we decided to use GoToMeeting to livestream those speakers and have them present virtually.

We then had three types of sessions we were offering:

- Live sessions – speakers presenting on-site
- Hybrid sessions – some speakers presenting on site, some presenting remotely
- Virtual sessions – speakers presenting remotely

Upon arriving in Tampa, we worked with our AV company to test our idea. We needed to make sure our virtual speakers could not only be heard in the session room, but also that they could hear the co-presenters, moderators and attendees who were on-site. With testing complete, we set up training sessions for our virtual speakers to become familiar with the GoToMeeting platform. During these trainings, we tested sound quality and mouse control capabilities for advancing slides remotely, and we answered logistical questions. Finally, all speakers were sent individualized emails with information on how to log in to GoToMeeting for their session. Then it was time to wait and hope for the best.

## Plan B Turns into Plan C

Though Day One ran smoothly, Day Two presented a new challenge that caused the team to have to pivot yet again. We received news that someone who had attended an event at the convention center the week prior had tested positive for COVID-19. The health and safety of our attendees is always our top priority, so we made the decision to postpone Days Three and Four of the conference.

While the decision was not one we took lightly, we knew it was the best course of action based on the situation at hand.

Our team was faced with a new question: how would we keep our promise and provide the remaining 18 educational sessions to our attendees? Once again, we turned to the technology we had in place and created a fully virtual conference for our remaining sessions.



Above: An on-site attendee visits the cyber cafe.  
Left: Speakers who could not travel to HOPA's conference presented virtually via the GoToMeeting platform.

Over the course of four days, we worked with our remaining speakers to schedule their sessions as live webinars. We then offered attendees the option of tuning in for the live broadcast of each session or watching the recording within an hour of the live presentation. Thanks to the flexibility and perseverance of our speakers, no continuing education was lost.

## The Outcome

Even with so many factors stacked against us, our team considers this conference to be a great success. Thanks to the technology we already had in place and the nimbleness of our staff and speakers, our attendees were still able to have a valuable experience, even if it was different from anything they had experienced with HOPA before.

The attendee feedback was overwhelmingly positive. Both live and virtual attendees were thankful that none of the sessions were canceled due to the pandemic. We learned that content is king for HOPA attendees, regardless of delivery method. Even though 80% of our sessions were presented virtually in some way, our attendees were able to gain the necessary education to advance in the field of oncology pharmacy. One of our in-person attendees said it best: "I was sitting in that room for 10 minutes

before I even looked up to notice there wasn't a speaker on the stage – it's amazing what technology can do!"

As we continue to survey our live attendees, virtual attendees and those who did not attend HOPA Ahead 2020, we look for trends that can help us plan for an even better virtual or hybrid conference experience in the future. No one knows when COVID-19 will cease to be a risk at large group events. What we do know, however, are the steps we can take to better prepare for live events during a crisis.

## Preparing Your Own Crisis Plan

Every event has different formats and attendee expectations, so there is no one-size-fits-all approach to help you prepare for your own virtual or hybrid meeting. However, there are some things you can consider as you navigate your association's contingency plan.

- What content or experiences will not translate well into a virtual setting? Let's face it, some things are just better face-to-face. Things like roundtable discussions, workshop-style educational sessions and hands-on learning may not lend themselves to a virtual platform. Take a moment to analyze your schedule and determine which sessions make sense to present virtually. Once this decision is made, work with your virtual platform vendor to see what opportunities there are for attendee interaction, polling or gamification to increase engagement.
- Do your speaker contracts contain verbiage in relation to last-minute session cancellations or presentation format changes? No one wants their live, in-person event to suddenly become virtual, but it's best to prepare not only your staff members, but also your speakers, should the need arise. Outlining your plan in the contracts allows for transparency and sets up clear expectations for all parties involved. The language doesn't need to be detailed, but some simple verbiage to prepare the speaker for a worst-case scenario can eliminate headaches down the road.
- How quickly are you able to rework your marketing plan? Marketing plans for live events can take weeks of hard work to develop. But what happens when your event needs to change in a matter of hours, and you need to communicate to your attendees, vendors, speakers and other

stakeholders? Plan ahead by building in some talking points or communication strategy if major, last-minute changes occur. By preparing for the worst, you will be able to effectively and quickly communicate your message.

- How will you make up for lost revenue? In addition to registration income, many associations rely on sponsorship and exhibitor funds to turn a profit at their events. In the world of virtual meetings, however, it can be incredibly difficult to bring in the same type of revenue. Get creative and plan ahead — what opportunities do you have to involve your sponsors and exhibitors in the virtual space? Can product showcases or commercially supported symposia be transitioned into sponsored webinars? Do you have the opportunity to send sponsored email blasts to your membership? Have conversations early with your corporate sponsors — they want to support you just as much as you count on them to succeed.

No one knows when COVID-19 will cease to be a risk at large group events. What we do know, however, are the steps we can take to better prepare for live events during a crisis.

To reemphasize, no two events are the same and no two associations can respond to a crisis in exactly the same way. But with these suggestions and some deep breaths, you too will find yourself doing what you can, with what you have, right where you are. **F**

EMMA CLAWSON IS THE FORMER EDUCATION MANAGER FOR THE HEMATOLOGY/ONCOLOGY PHARMACY ASSOCIATION (HOPA).

### PREPARE FOR THE UNEXPECTED.

Visit [associationforum.org](https://associationforum.org) for a variety of resources and pointers on virtual events, livestreaming and more.





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## Rising to the Occasion

GOVERNMENT  
AFFAIRS PROGRAMS  
CAN BE VITAL ASSETS  
DURING TIMES OF  
CRISIS. HERE'S HOW  
THEY CAN MAKE THE  
MOST IMPACT.

BY BRIAN A. BERNARDONI

When a government affairs program is running at its best, it can both protect and enhance an association's reputation. But, no matter how big, influential or game-changing your program is, COVID-19 has been a considerable test to associations and their government affairs teams.

The aggressive nature of the COVID-19 virus has exposed gaps in our healthcare system, our government and our businesses. It has shown where there are breaks in the supply chain and revealed the weaknesses of many for-profit business models.

For the nonprofit community, the need for federal funds has risen to unprecedented levels. While 501(c)(3) associations have proven popular with Congress — and as a result were beneficiaries of federal funds — the wide span of 501s that do the vast amount of educating, accrediting, marketing and meeting planning for the nation's professionals remain underserved and at risk despite aggressive and continuing advocacy from Association Forum, ASAE and U.S. Travel to name a few.

These are tense times filled with endless remote meetings focused on the cascading and interlinked problems facing us all. As a result, these times have increased awareness of the important work government affairs professionals do for their organizations and their impact on the bottom line. To that point, many organizations are currently measuring the effectiveness of their advocacy programs.

The time to assess a fire extinguisher is not in the middle of a fire. The same can be said of a government affairs team. The focus now, in this time of crisis, should be how to improve communication and develop a responsive approach to today's problems without losing sight of the association's long-standing goals.

From managing lobbying efforts to developing public policy, position papers and external affairs strategy, government affairs professionals fill many roles. This diverse skill set makes them assets in times of crisis.

Currently, organizations are calling on Washington, D.C., state capitals and local governments to secure needed funds and resources to maintain associations in these unprecedented times. This is a highly competitive marketplace where an organization's access, knowledge and familiarity of a government body can be used to bargain for funds.

How do you get the best out of your government affairs team to make a difference in these times? How do you evaluate your program? Here are some areas to consider:

## Stay Accountable

The first place many associations evaluate CEOs and boards is through their strategic plan deliverables. Why not lobbyists? Government affairs teams provide many services to members. They aim to:

- Work with legislators and regulators to make sure the businesses under their purview can function and shape policy that could impact them
- Mitigate taxes and fees
- Craft laws that benefit the industry and defeat laws that could negatively impact the industry
- Seize industry-wide opportunities for growth and collaboration while avoiding threats
- Protect the reputation of the industry and its participants
- Assure the viability of the industry by participation in coalitions, task forces and working groups

While this list is not complete, each of these services can be linked to trackable outcomes. Establish milestones, track issues, and keep a scorecard of legislative wins and losses. Evaluate and survey members on issues. This is a great exercise and an important step to foster support for the association's priorities and future needs.

One cautionary note: Lobbyists in most jurisdictions (including Illinois) are prohibited from promising anything with regards to the outcome of a bill, regulation or piece of legislation. They can, however, outline the path and tasks by which they will work toward a particular outcome of a bill, regulation or piece of legislation.

## Listen

No matter the experience of the government affairs team, these times are unprecedented and call for extra care. Constantly "listening to the whispers" and communicating them to the CEO, board and stakeholders is as critical as ever. A minor incident today can easily become a full-blown crisis tomorrow.

## Be Proactive and Innovative

Establishing where you fit in the political environment takes evaluation and honesty. The middle of the road may have been the safest place to drive in the past, but today it is clearly the most dangerous place to be

From managing lobbying efforts to developing public policy, position papers and external affairs strategy, government affairs professionals fill many roles.



## ADVOCATING FOR ASSOCIATIONS

Since the declaration of the pandemic in March, the focus of Association Forum's advocacy has been on expanding relief funding for organizations experiencing hardship — specifically 501(c)(6) nonprofits, a category that includes professional associations.

Through hosting town halls with legislators such as U.S. Rep. Raja Krishnamoorthi and advocacy at the federal, state and local levels, president and CEO Michelle Mason said Association Forum will continue to make sure the voices of associations are heard and that lawmakers understand their current plight.

"We hope to have future town hall meetings with other legislators to tell the story of associations and why it's important to get relief funding," Mason said, emphasizing that she wants lawmakers to understand that associations are also small businesses and employers.

Association Forum has long taken a three-tier advocacy approach: at the federal level, with the American Society of Association Executives (ASAE); at the state level, in collaboration with the Illinois Society of Association Executives (ISAE); and more locally in Cook County and Chicago with retained lobbyist Brian Bernardoni.

for many organizations as the battle for resources and relevancy ensues. Programs can shine by identifying what innovative ideas they deem worth fighting for to benefit the association. Defense is a primary responsibility for a government affairs team, but by listening to member needs, ideas and programs can be cultivated to produce innovation. Inspire your team to see beyond defense.

When you have developed a plan and a team that listens and is inspired to be proactive and innovative while defending the organizational flank, the goal is to effect change and make an impact. It all starts with communication.

### Communicate


At the end of the day, this is what matters. The government affairs team should be selling association ideas, vision and mission to elected officials. However, the clear direction, support and counsel of the CEO, the board and the membership is critical before conversation begins on any issue.

Documentation, frequent briefings and meetings with stakeholders are important for establishing this type of communication. Opening lines of dialogue with the CEO and the leadership team allows for transparency, and builds accountability and grassroots buy-in to the position being taken. A government affairs team emboldened with that support has a much greater level of success than one acting independently or reporting back on a need-to-know basis.

An important element of communication is documentation. Now more than ever, with the role of regulators on the ethical behavior of those engaged

in politics, the need for detailed documentation should be second nature for government affairs professionals. Examples of what to document include: lists of members of coalitions, member engagement tracking, political contacts and outcomes. The details of this documentation can also serve to write memorandums and briefings. Furthermore, communication that is transparent, direct and, above all, factual, provides the best information for decision-makers.

Communicating outcomes and the value of your services to the association is perhaps the most important role of a government affairs team. If done correctly, it cannot only build interest in the program but also garner grassroots support when it is needed most. The best programs are ongoing, frequent and molded to specific audiences using all the tools available, such as emails, social media, position papers, issue briefs and scorecards.

No matter what happens next, the government will have a major say in the opening of businesses, how we do business and where we do business. Taking the time to look at the foundation of your government affairs program will help guide your organization through the challenging days ahead. 

BRIAN A. BERNARDONI IS A MANAGING PARTNER AT AURELIUS PUBLIC AFFAIRS AND THE ACTING LOBBYIST FOR ASSOCIATION FORUM.

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# Bold and Balanced

A LOOK AT THIS YEAR'S WOMEN'S EXECUTIVE FORUM BY HEATHER SWINK, CAE



Left: Cara Brookins signs copies of her book "Rise: How a House Built a Family." Below: Brookins delivers her keynote presentation.



Breaking the glass ceiling once and for all requires a bold and balanced approach. During Association Forum's 8th annual Women's Executive Forum, held on March 11 (before a stay-at-home order was issued) at the W Chicago — City Center, participants learned from their women colleagues about what being bold and balanced means — identifying and nurturing your personal brand, leadership voice and unique value; defying the odds; and persevering by believing in yourself, among other powerful strategies.

## 'We make history every day'

The day began with an ice breaker, speed-networking style. At their assigned tables — based on career levels and tracks — women shared their courageous professional and personal accomplishments and the challenges they overcame. They discussed how they maintained balance in the midst of their bold moves. They revealed goals to accomplish this year and pitfalls to anticipate.

Association Forum CEO Michelle Mason noted that the Women's Executive Forum is intentionally held during March, which is Women's History Month.

"However, at the Forum, we believe women don't make history just one month each year — we make history every day," Mason said.

## 'Building the best you'

Opening keynote speaker Cara Brookins, author of "Rise: How a House Built a Family," and a survivor of domestic violence and a mother of four, shared her story of how she constructed a home from scratch while rebuilding her family.

"I was desperate. I lost my entire life savings. I made some bad choices," Brookins said. Her ex-husband was diagnosed with paranoid schizophrenia, and he stalked her family and threatened their lives. Her second husband was physically abusive. By the time her oldest children were 17 and 15, they had lived in nine different homes.

"I was stuck. I didn't know how to make things better. I felt weak, small, powerless," Brookins said. "I saw the haunted eyes, slumped shoulders of my kids. I decided I would do anything to build these kids a better life."





The Women's Executive Forum is an opportunity for women leaders in the association and nonprofit communities to establish and deepen connections while discussing unique issues faced by women in the industry. Participants explore personal and professional growth ideas in a supportive, nurturing and confidential environment.

In 2007, she came up with the idea to build a house in which she and her family felt safe. "The idea of building a house changed these kids: It changed what they saw as possible," she said.

"I realized I had to take big steps and big action. More importantly, I realized that I already had everything inside me to make this change."

Within a year, her home was built — and her family rebuilt. She has since written eight books, launched her own business and co-written a screenplay based on her life. Brookins shared some of her top lessons learned:

- Take big action. The stakes and pressure were high when Brookins took on a high-risk, nine-month construction loan to build a house. She made a detailed schedule that could even make professional project managers envious. When 1,500 concrete blocks and 80-pound bags of concrete mixer to build her foundation showed up at her one-acre property site, she did what many people do these days to solve problems: She turned to YouTube for a solution.

"Successful people recognize when fear strikes to use that fear and adrenaline to do that hard thing. For me at this time, the hard thing was pouring the foundation. For 40 days, I hand-mixed concrete mortar using wheelbarrows of water from a neighbor's pond," Brookins said.

- Do hard things. Whenever Brookins felt nervous working on the construction site, she would ask herself, "If we go ahead and do this thing, like run a gas line, what's the worst that can happen? The

answer to that question is, 'being willing to take a do-over,'" Brookins said.

Eventually, her home was completed. Brookins and her family lived in the 3,500-square-foot house for 11 years — which featured special amenities like a floor-to-ceiling library, a two-story treehouse, a Harry Potter-type cupboard under the stairs and a three-car garage.

"Don't put off your big dreams and goals. If a single mom with no construction experience can build her dream house, you guys can reach your dreams," Brookins said. "Surround yourself with a team of people who can believe in your big dreams."

While building a home on your own may be a reach for some, Brookins said fretting over a presentation is something to which most people can relate.

"Today, none of you wanted me to fail — you all wanted me to succeed. If I got tongue-tied or fell, you all would have supported me," Brookins said. "And guess what? Next week, I get a do-over, I do a talk somewhere else. The message here today is that we don't need to be rescued. We have what's inside us to make big, bold changes." **F**

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

**READ THE EXTENDED VERSION.** Visit [forummagazine.org](http://forummagazine.org) to learn more about the Women's Executive Forum, including advice and motivational stories from a variety of inspiring women professionals.

More than 140 women association leaders gather at the forum.

## Association Forum and ISAE Announce Partnership

In April, Association Forum and the Illinois Society of Association Executives (ISAE) announced a strategic partnership. Through a new agreement, ISAE's more than 400 members will now receive Forum Plus membership, where they will receive a suite of benefits, including: digital access to FORUM magazine; complimentary registration to all webinars; member rates on recorded webinars and signature programs, such as Holiday Showcase; member rates on CAE Study Group courses, with the option to join via livestream; member rates on in-person educational offerings, with the option to join via livestream; access to MyForum online community; participation in Shared Interest Groups (SIGs); This Week — a weekly email highlighting industry trends and Association Forum events; and member-only resources such as Professional Practice Statements and the CEOly® newsletter.

Current Association Forum members will also receive member rates on all ISAE education — both live and online, including the Annual Convention and other special events.

Both organizations look forward to exploring more ways to work together. For more information on ISAE, visit [isae.com](http://isae.com).



Left to right:  
Sara Decatoire,  
CAE, IOM,  
ISAE executive  
director and  
Kristen Butcher,  
CMP, ISAE  
president.

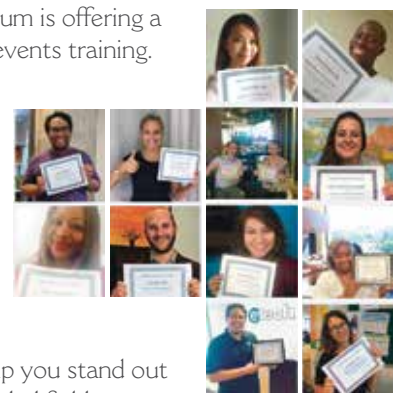
The graphic features the PCMA logo at the top, followed by the text "Digital Event Strategist" in large white letters, and "CERTIFICATION Live Course" in smaller white letters below it. The background is dark blue with a faint world map and abstract shapes.

## Become a Digital Event Strategist

Digital events are part of the fabric of association management now more than ever. That's why, as part of a new partnership with the Professional Convention Management Association (PCMA), Association Forum is offering a perk to members who enroll in digital events training.

Knowing how to create a digital strategy has become a way to future-proof your work. Accelerate your ability to plan and produce a seamless experience with the PCMA Digital Event Fast Track. This curated collection of core lessons lays the groundwork for the full Digital Event Strategist certification, a designation that will help you stand out as an authority in an increasingly crowded field.

Discover the full PCMA portfolio of customizable digital solutions — including coaching and consulting — at the PCMA Digital Experience Institute. Use code **FORUM** to receive the PCMA member rate when you register.



FOR MORE INFORMATION on the courses, visit  
[pcma.org/engage/learning-products](http://pcma.org/engage/learning-products).



## Association Forum Teams Up with Anthony Rizzo Family Foundation to Provide Meals to Healthcare Workers

The COVID-19 pandemic has changed so much in our daily lives. Living rooms have turned into offices, kitchen tables are homeschooling centers, and even buying groceries has become an online hunt for delivery windows. Yet while many of us stay home to ride out the worst of the COVID-19 pandemic, healthcare workers are still leaving their homes every day to battle the pandemic and provide care where it's needed most.

This is why Association Forum launched a fundraising campaign to provide meals to healthcare workers. The campaign used GoFundMe to raise more than \$8,600 and partnered with the Anthony Rizzo Family Foundation to deliver the meals.

LEARN MORE about the campaign and how it came together in the web exclusive at [forummagazine.org/category/web-exclusives](https://forummagazine.org/category/web-exclusives).



## TMG Adds Virtual Meeting Expert to Team




Derrick Johnson,  
CMP, DES

Association management company Talley Management Group, INC. (TMG) has added **Derrick Johnson**, CMP, DES, to its team as the director of event strategy and development. Johnson's role was created specifically to aid clients seeking to transition their in-person meetings to virtual platforms in response to the COVID-19 pandemic.

"TMG works at the speed of our clients' needs," said TMG COO Joe Sapp, CAE, MBA. "As in-person meetings and events are being canceled or postponed daily, TMG saw an immediate need for an

expert in the area of virtual meetings and events. Derrick brings an array of skills and abilities that will enhance our already robust meetings and events offerings. COVID-19 has increased the need for virtual meetings, and adding Derrick to our team will help deliver the exact services needed by nonprofit associations."

Johnson joins TMG after serving as the executive director for the National Behavioral Intervention Team. TMG currently manages more than 20 full-service clients in addition to offering services such as meeting management and consulting. 



# MEMBERSHIP

## PROMOTIONS AND CHANGES

### American Thyroid Association Announces New Executive Director

The American Thyroid Association® (ATA) proudly announces the appointment of **Amanda Perl** as the organization's new executive director, as of May 11, 2020. She succeeds Bobbi Smith, who is retiring after 24 years of dedicated and transformative leadership for the ATA. Perl and Smith will work together to transition responsibilities and management of the ATA staff.

"A sincere thanks to the selection committee, led by John Morris, for selecting a superb new executive director for the ATA," said ATA president Martha Zeiger. "I have no doubt that Amanda Perl, building on the ATA's strong foundation created by Bobbi Smith, will bring the ATA to a whole new level in the world of medical societies."

Perl brings more than 20 years of experience in association leadership, with expertise in educational program development, strategic planning, governance training and international program development. She is currently the chief global member engagement officer at the Endocrine Society, where she has

led the creation of the society's special interest groups to increase member engagement and value.

In her time with the Endocrine Society, Perl has also expanded leadership and governance training programs, particularly by launching the award-winning Global Leadership Academy, and built partnerships with other global organizations focused on endocrine health.

Before joining the Endocrine Society, Perl spent nine years with the Institute of Food Technologists (IFT), where she launched the Certified Food Scientist certification program and led fundraising initiatives for the IFT Foundation.

"I am excited to join the ATA team," Perl said. "ATA has a strong foundation and rich history, and I look forward to working with the ATA leadership and staff to move the organization forward."



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**Mary Burke**, Columbia County Board of REALTORS®

**Megan Collette**, BenchPrep

**Alex Corrao**, McKenna Design Group, Inc.

**Kevin Fitzpatrick**, Enforme Interactive

**Dan Foley**, Adage Technologies

**Maria Rinaldi**, Projectify IT Services

**Lynn Rotunno**, Illinois Park and Recreation Association

**Teri Stech**, Pediatric Orthopaedic Society of North America (POSNA)

**Mark Thomas**, Electrical Contractors' Association of the City of Chicago

**Sarah Thompson**, YWCA USA

### Forum Plus Members

**Karina Barajas**, American Academy of Implant Dentistry

**Elias Vesterfelt**, American Academy of Implant Dentistry

**Barbara Larson**, American Association of Endodontists

**Kathryn Dattomo**, American Association of Neurological Surgeons

**Kristen Simmons**, American College of Healthcare Executives

**Emily Stephens**, American College of Osteopathic Family Physicians

**Colleen Norton**, American College of Prosthodontists

**Rachel Yehl**, American College of Prosthodontists

**Kendall Coleman**, American Society for Gastrointestinal Endoscopy

**Ginger Clark**, American Society of Anesthesiologists

**Jamie Storyward**, Association of Legal Administrators

**Madhuri Carson**, Association of Nutrition & Foodservice Professionals

**Meltoya Jones**, CCIM Institute

**Toral Patel**, CCIM Institute

**Khristen Phillips**, CCIM Institute

**Evan Stober**, Coin Laundry Association

**Emilija Piric**, College of American Pathologists

**Claudia Espinel**, Institute of Food Technologists

**Sandra Ibe**, Institute of Real Estate Management

**Emily Bastedo**, ISACA/IT Governance Institute

**Abby Baughan**, Mechanical Contractors Association

**Tom Van Jacobs**, National Sporting Goods Association

**Laurel Ashley Brummel**, SmithBucklin

**Erin Cannon**, SmithBucklin

**Kristin Ann Frankiewicz**, SmithBucklin

**Elizabeth Hansen**, SmithBucklin

**Jacqueline Jarene Kiley**, SmithBucklin

**Gregory James McIlraith**, SmithBucklin

**Jessica Morgan**, SmithBucklin

**Kristen Perry**, SmithBucklin

**Gianna Scheuneman**, SmithBucklin

**Audra Marcotte Schuler**, SmithBucklin

**Lynette Dummer**, Society for Vascular Surgery

**Adruleka Johnson**, Society for Vascular Surgery

**Tara Degl'Innocenti**, Society of Actuaries Research Institute

**Esraa Aburass**, Society of Women Engineers

**Juliet Crowell**, Society of Women Engineers

**Kristen Davidson**, Society of Women Engineers

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# CALENDAR

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

## JULY

### Virtual Summit on Welcoming Environment®: From Conversation to Action

July 22, 2020  
8:30 a.m. – 11:30 a.m. CT  
Online

Forum is excited to release the results of our Welcoming Environment research study and explore how associations can better embrace the principles of diversity, equity and inclusion.

### Attendee Acquisition Roundtable

July 30, 2020  
10 a.m. – 2 p.m. CT  
Online

Join this facilitated virtual discussion in partnership with Lippman Connects to learn how to increase event attendance with digital integration. Deliver the right content to the right prospects at the right time. Register at [lippmanconnects.com/aar](https://lippmanconnects.com/aar).

## AUGUST

### Association Management Essentials: Finance for the Non-Finance Professional

Aug. 12, 2020  
9 a.m. – 12 p.m. CT  
Online

Enhance your financial acumen by learning how to examine and analyze financial statements, discuss how to prepare and monitor a program budget and review Form 990. Part of the Association Management Essentials, this course is designed for non-financial professionals and will give you the tools to manage a program or department budget.

### Forum Forward

Aug. 26, 2020  
8 a.m. – 4 p.m. CT  
Online

Forum Forward will prepare association professionals for the uncertainty the future holds. We will explore how professionals can adapt their career plans, advance their organizational strategy and expand their impact in this new era.

## SEPTEMBER

### Association Management Essentials: Ins and Outs of Association Law

Sept. 23, 2020  
9 a.m. – 12 p.m. CT  
Online

During this course, you will learn about governance, tax, contracts, intellectual property and antitrust. You will laugh. You will cry. You will come away knowing a lot more than you do now about legal issues for nonprofits. Part of the Association Management Essentials, this course is designed for non-legal professionals and will give you an understanding of laws impacting your work and your association.

### SmartTech Conference®

Sept. 30, 2020  
9 a.m. – 4:30 p.m. CT  
Online

The SmartTech Conference will help you navigate a new decade and transform the digital side of your business with tools and techniques for incorporating AI and emerging technologies.

### Online Learning

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## Keynote Speakers



### **Technology Isn't a Substitution for Strategy**

*Presented by Simona Rollinson, Chief Technology Officer, ISACA*

### **Data Literacy - The Human Aspect of Data**

*Presented by Jordan Morrow, Global Head of Data Literacy, Qlik*



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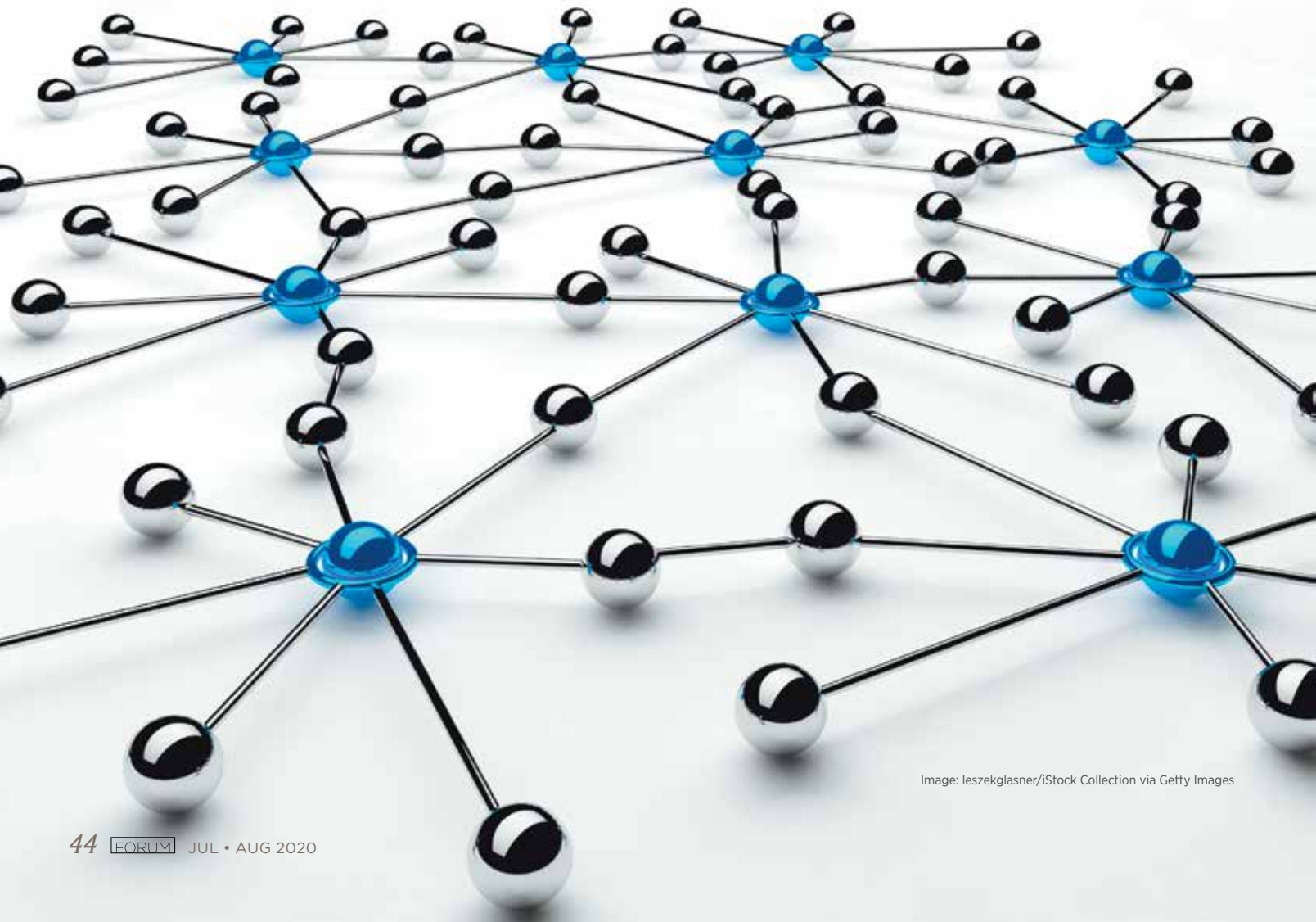


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channels, our content programs connect brands to people, driving strategic outcomes and reinforcing the relational value between the two. That's why we do what we do.

## What we do

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

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

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

## Louisville Tourism

### David Kinney

Director of Midwest Sales

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[GoToLouisville.com](http://GoToLouisville.com)



Louisville has steadily become one of the hottest travel destinations in the U.S. From its booming bourbon renaissance, to its culinary jewels, to its iconic events and attractions, the city offers a menu of things to see and do all wrapped within its hallmark Southern charm. Not to mention, Louisville has been revitalized with a \$1 billion investment in tourism infrastructure, at the heart of which is the expanded and renovated Kentucky International Convention Center that opened in 2018 accompanied by new hotel development and new Urban Bourbon experiences. It's no wonder Smart Meetings named it one of "11 Cities on the Rise You Can't Pass Up."



## PCMA

### Marcia Mawe

Vice President, Marketing and Communications

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[www.pcma.org](http://www.pcma.org)



PCMA believes that business events can economically and socially transform communities, enterprises and individuals. As the world's largest platform for business events strategists and their business partners, PCMA's success is driven by a commitment to providing provocative executive level education, face-to-face networking and business intelligence to its global audience of 7,000 member professionals and students.

Through its Ascent leadership initiative to promote inclusion and diversity across the business events industry and beyond, PCMA seeks to empower those challenged by gender, sexual orientation, race, ethnicity or disabilities to find success.

The PCMA Digital Experience Institute® (DEI) is dedicated to advancing engagement around digital events, meetings and learning. DEI supports and contributes to research, education, thought leadership, promotion and the digital events community. Headquartered in Chicago, PCMA has 17 chapters throughout the United States, Canada and Mexico with members in more than 40 countries.

## Town of Addison Visitor Services

### Alisha Holmberg

Tourism Coordinator

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[visitaddison.com/tourism/meetings](http://visitaddison.com/tourism/meetings)



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## How Do You Stay Productive When Working from Home?

I am more diligent about keeping a checklist of things to do and using Outlook Tasks to set

reminders. I make sure to take small breaks every few hours to rest my eyes from the computer screen and to stretch my muscles for energy. (In the office there are people interruptions, and I

need to walk to the copier!) Most importantly, I don't let work creep into my off-hours any more than if I were in an office. It's easy to let work flow into your schedule more when your commute is just down the hall.

**Carol A. Pape**, CAE, chief operating officer, Association of Professional Chaplains

I write my goals and to-do's for the day, and I cross them off as I accomplish them. I also set alarms throughout the day as reminders. I allow myself self-care moments like taking a walk or stretching to reboot my mind and body.

**Hazel Oreluk**, MA, CADS, director of research, American Orthopaedic Foot & Ankle Society

In order to be focused and have a sense of accomplishment, I set goals for what I want to achieve each day and in the future, and I take incremental steps to achieve them. In a virtual office environment it is still critical to stay connected with the staff team, leadership and outside world via phone, text, email or webcam to ensure everyone is working in harmony toward the organization's strategic goals. To

stay physically and mentally healthy, it is important to set aside some time for myself each day — to the extent possible — to think, plan, relax or spend with family and friends. In addition, exercising, eating well and maintaining a regular sleep schedule all help keep me productive.

**Mitchell Dvorak**, MS, CAE, executive director, International Association of Oral and Maxillofacial Surgeons

Being productive while working from home can be challenging when this environment is your normal "escape from work" space. I find it's very helpful to still have a get-ready-for-work routine. Having a distraction-free space and setting daily goals for yourself help as well. Calling or teleconferencing a team member and hearing their voice can help lift your spirits, reducing feelings of isolation. If business has slowed, this is a great time to reduce stress by finishing any nagging projects.

**Rob Harkey**, foundation program coordinator for NAPFA Consumer Education Foundation, National Association of Personal Financial Advisors

To stay productive while working at home, I make sure to keep a schedule by getting up at the same time every day, planning my weekly tasks and goals and breaking it down into what needs to be done each week. When I need to really focus and maintain steady work with high attention to detail, I rely on my favorite playlist — Bach's Cello Suites played by Yo-Yo Ma. It's also important for me to remember to have healthy snacks on hand to keep my physical and mental energy consistent, so I prep my food for the week on Sunday as much as possible to keep me from eating all the junk in the house!

**Crystal Stone**, M.Ed., CAE, PMP, program manager, Bostrom



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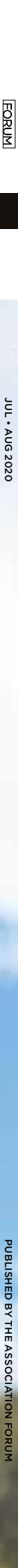
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Through these unprecedented times, one thing is certain - we can't wait to welcome you back to Louisville. Our team is committed to ensuring the success and safety of your future meetings, and we look forward to extending our signature southern hospitality to you and your attendees as soon as we are able.

Learn more about hosting an event in Bourbon City at [GoToLouisville.com](https://www.GotoLouisville.com).





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