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# REMOTE EARNING

Digital events can  
supercharge revenue  
in the pandemic

**22** AIHA Capitalizes  
During COVID-19

**28** The Future of  
Conferences

**34** A Prep School for  
Digital Events





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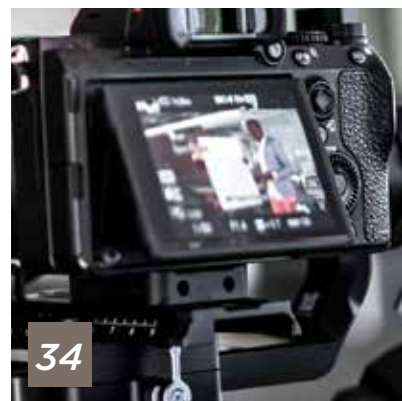
14



22



28



34

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## Features

### COVER STORY

#### 14 Remote Earning

The pandemic may have crushed in-person conferences, but associations can still supercharge revenue with digital events.

### CASE STUDY

#### 22 A Call to Action

COVID-19 thrust an association's members into the national spotlight.

### ASK THE EXPERT

#### 28 What Does the Future Hold for Conferences?

COVID-19 disrupted 2020 conference plans. What will 2021 and beyond look like?

## Departments

### PERSPECTIVE

- 4 Letter from Michelle Mason, President and CEO

### PULSE

- 6 Exceptional Circumstances, Exceptional Results

### LAW REVIEW

- 10 Hotel Contracts in the Age of COVID-19

### MASTER CLASS

- 34 Prep School

The move to digital-only events requires new skills and preparation for speakers.

### IN THE KNOW

- 38 Association News  
40 Membership  
41 Education Calendar  
44 Ad Index/Statement of Ownership  
45 Sponsored Content

### WORK • LIFE

- 48 How do you unwind after a long day?

### FORUM MAGAZINE ONLINE

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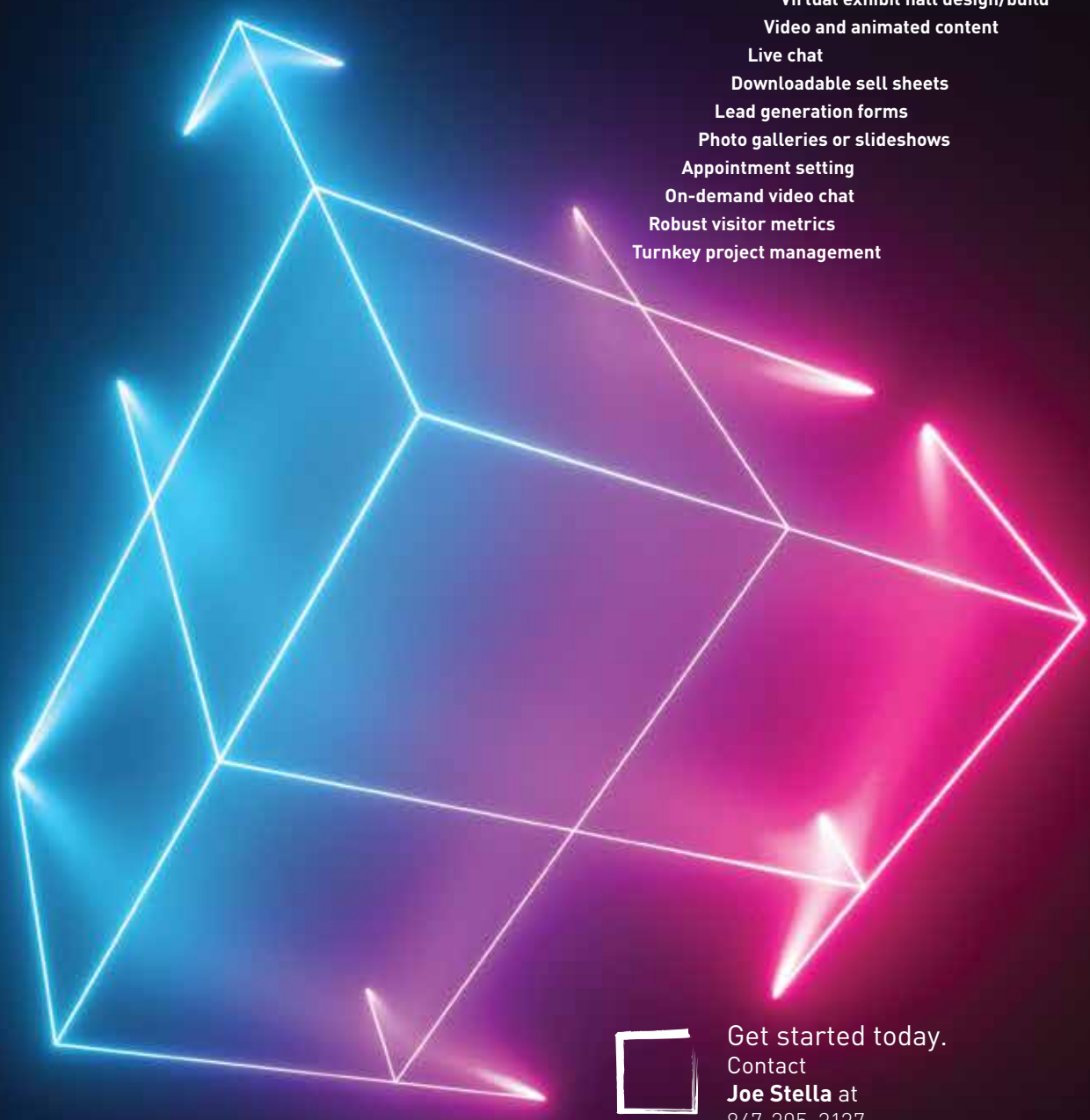
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MICHELLE MASON, FASAE, CAE

PRESIDENT AND CEO  
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## How the Pandemic Has Changed Meetings, and What We're Doing to Change with the Times

Earlier this year, in the January/February issue of FORUM, I wrote about staying agile and getting creative with your non-dues revenue strategy. "The fundamental nature of member engagement has evolved," I wrote in the issue's CEO Letter. "We must evolve to stay relevant to members and as an industry."

Little did we all know that 2020 would become a real-life testing ground for our organizations in terms of agility, creativity and viability.

This year has held too many challenges to count and among them was putting on events for our members. We moved our internal teams remote, we canceled business travel and we reached a new level of mastery on Zoom calls. All the while, our organizations had to cancel in-person events, switch to virtual events and reimagine attendee engagement.

We are right there with you! Forum's team quickly shifted from in-person to virtual events. While we'd always hosted webinars, we had to increase our online offerings so that members still got the same educational value as before the pandemic. Our office in downtown Chicago has always served as a gathering place for the association community via SIG meetings, CAE study groups, workshops and more. Once we closed the office, we had to move all of that content and all of those connections online.


Like you, we've been learning as we go. We are always striving to be transparent for our members so that we can serve as an "open case study" for other associations. In the spirit of transparency: It's been tough! But we had a great foundation for our events because the content was still strong. Logistics, technology and revenue were all places we needed to learn and grow.

We quickly learned that a virtual conference needs to be shorter than an in-person conference. We're all feeling the fatigue of working remotely and staring at screens, so we didn't want our meetings to contribute to that burnout. Instead, we looked for creative ways to interact with attendees and move them through the day without sacrificing educational content.

One way we did this was to hire an outstanding facilitator, Karen Millsap, for Forum Forward. Karen introduced the meeting, connected with attendees between sessions, served as a moderator at the closing keynote, and she even tried her hand at mixing drinks during the closing reception. Her energy helped carry attendees through the day, and she also gave useful tips for using the meeting platform, when to grab lunch and when to take a break.

Another lesson we learned this year is that we need to rethink pricing strategy in the virtual space. This has been a huge area of concern for many associations, as our revenue models around trade shows and conferences have had to change significantly. Honestly, this is an area we're still figuring out and working to build up. We've already experimented with some small hybrid meetings (some in-person and some online education), and we'll continue to do so in 2021. The health and safety of our staff and members will continue to guide our decisions in event planning and every other aspect of association business.

We know that the world will never be the same after COVID-19, but we are still optimistic for what's ahead. This unique time has prompted our teams to develop an arsenal of creative solutions for engaging attendees, even under the most unusual circumstances. Associations have always been focused on creating community no matter what the current climate is like. Now is a time to take pride in our profession and look for opportunities within the challenges we face. It is time to integrate Welcoming Environment® concepts and develop a sense of belonging, connection and appreciation of uniqueness in our digital meetings and member engagements in this new reality.

I look forward to seeing you in 2021, if not before! 

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 **Polish** 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.

W ramach starań o stworzenie przyjaznej atmosfery (Welcoming Environment®) dla naszych członków, poniżej przedstawiamy listę podstawowych wartości, przetłumaczoną na język polski przez Interpro Translation Solutions, Inc.

### Tworzymy przyjazną atmosferę

Tworzymy przyjazne środowisko, które aktywnie zabiega o wzbogacanie ogółu społeczeństwa wyznając zasadę, że zespół jako całość może więcej niż suma jego składowych. Pragniemy, aby każda osoba w naszym środowisku czuła się mile widziana, reprezentowana, zaangażowana, zainspirowana i miała wiarę we własne siły.

### Stawiamy na innowację i jakość

Uwielbiamy nowe pomysły i stale poszukujemy inspiracji, zarówno wewnątrz naszego zrzeszenia jak i poza nim, doceniając nawet najmniejsze usprawnienia. Zachęcamy do stosowania przełomowych rozwiązań, ale wiemy też, kiedy nie należy dać się ponieść. Naszym celem jest stałe doskonalenie.

### Radośnie i pozytywnie

Faktem jest, że obecnie spędzamy więcej czasu z kolegami w pracy niż z własną rodziną. Staramy się więc, aby atmosfera była radosna, pozytywna i ogólnie tworzyła wspaniałe miejsce pracy.

### Uczciwa i otwarta komunikacja zespołowa

Nie każdy wie wszystko! Kluczem jest efektywna komunikacja. Staramy się kultywować środowisko, w którym można mówić uczciwie i otwarcie, mając na celu budowanie lepszego zespołu. Szczerłość postrzegamy konstruktywnie. Członkowie naszego zrzeszenia czerpią wartość z wzajemnej współpracy.

### Wykazywanie odpowiedzialności

Każdy z nas odpowiada za własne postępowanie, dlatego zachęcamy osoby do zadawania pytań i rozwiewania wątpliwości. Nasza działalność wymaga współpracy niezależnych zespołów, więc musimy mieć do siebie zaufanie co do jakości usług przekazywanych naszym odbiorcom.

### Etyka zawodowa wygrywa

Działamy w sposób etyczny, rzetelnie przekazując innym swój czas, umiejętności i wiedzę, tak w pracy zawodowej, jak i życiu prywatnym. Zobowiązujemy się wzrastać w naszym zrzeszeniu w sposób korzystny dla środowiska i społeczeństwa.



# Exceptional Circumstances, Exceptional Results

IN THESE CHALLENGING TIMES, CREATIVITY, AGILITY AND THOUGHTFULNESS ARE REIGNING SUPREME.

## The Lights Still Go On

The Magnificent Mile Association didn't have much of a choice for its annual tree lighting parade: You can't host a festival that gathers a million people in the middle of a pandemic. The association, which does business development and advocacy for Chicago's famed Michigan Avenue and the surrounding area, will instead produce a virtual festival for the first time. (The association will still turn on all the lights and set up decorations for the area as a way to entice visitors.)

CEO Kimberly Bares details what's the same — and what's new — for an event that is typically one of the country's largest parades.

### Let's first take a step back. Can you walk us through how you got to this decision?

In March, we realized the extreme burden the pandemic would have on our members, and thus, our association. Our district is home to the best Chicago has to offer: We boast 65% of all the downtown hotel rooms (numbering more than 26,000), as well as world-renowned museums, shopping, dining and attractions.

Due to travel restrictions and public health concerns, we need to market downtown to Chicago residents and those within a regional drive time for the foreseeable future. We can no longer rely on conventions, international tourism or even national tourism to give our downtown businesses the customers they need.



### A Q&A WITH KIMBERLY BARES, CEO OF THE MAGNIFICENT MILE ASSOCIATION

#### What was the decision-making process like to forego a live event in favor of a digital one?

We spent a lot of time thinking about how to honor the spirit of the event and represent the great city of Chicago before deciding on our final plan. As we processed the letdown internally, we knew we had to get ahead of a public conversation and proactively made the announcement on ABC 7 before Labor Day.

It was important to us that this year not feel like a loss but rather an opportunity to build on our holiday tradition. Understanding what we cannot do during the pandemic has provided a soft reset and refocus of our event priorities. The Lights Festival was always meant to provide a lift for our member businesses by kicking off the holiday season, and that couldn't be truer this year as we head into the long winter months.

#### What will that look like?

Americans are gearing up for the holidays especially early during the pandemic. Our fans are eager for something warm and familiar, as we all are.

So while we cannot produce an event, we can provide an ongoing experience of holiday cheer. The Magnificent Mile will be illuminated through the winter. The Association will use the tree lights as a springboard for digital and experiential marketing



# A Teaching Moment

## FOR ASCM, A CREATIVE PIVOT MEANT NEW PARTNERSHIPS THAT NOT ONLY FILL THE TALENT GAP BUT ALSO GET PEOPLE BACK TO WORK.

As Abe Eshkenazi, CEO, Association for Supply Chain Management, surveyed the employment landscape early on in the pandemic, there was a problem as plain as day. “We have record-high unemployment yet millions of jobs that need filling in supply chain,” he says.

The coronavirus disrupted — and continues to disrupt — all sorts of industries disproportionately. Certain areas, such as retail and restaurants, saw heavy job losses. His chief concern: How do you get people back on the job? How do you get people to see that there are other career opportunities?

To answer those questions, ASCM leaned on its core strength: education. The association’s primary focus has always been to educate and train supply chain professionals of all levels. For ASCM, working to overcome the burdens of the pandemic meant expanding the reach of their current educational offerings.

“The pandemic has opened people’s eyes to supply chain issues,” Eshkenazi says, pointing to challenges such as the inability to get toilet paper earlier this year. “It also opened people up to the gamut of career possibilities that exist within the supply chain. The need for supply chain professionals is very acute right now.”

In particular, when Eshkenazi and his team saw the impact of what was happening in the retail sector, he reached out to the



National Retail Federation and pitched an opportunity to work together. The NRF has a program, RISE Up, that helps member companies and employees develop capabilities and knowledge. But they lacked content for supply chain professionals. So ASCM identified existing content that was necessary to build supply chain skills and embedded that into NRF’s existing RISE Up program, with the new materials going live in October.

“The question was, what relevant content could people use to get back on the job?” Eshkenazi says. “We wanted people to see that there are opportunities for them. Perhaps not in the traditional career path that they had designed. But more importantly, we wanted them to feel good about themselves and that they were contributing.”

For Eshkenazi, it was important to simply extend the association’s output by passing on content through other organizations, including with others beyond NRF. “We’re not expecting a whole host of these individuals to join our association as supply chain professionals. While some people might choose it as a career opportunity, that’s not the original intent. The original intent was to solve a problem for people who don’t have a job.”

What really distinguishes the association industry, Eshkenazi says, is this ability to work together to solve a common problem for members and member organizations.

“I can’t think of a better use of our resources and our staff than to help out other organizations. This is why we’re in business.”



to support our businesses through what we hope will be the final months of the pandemic and will provide a compelling reason for families from Chicago and beyond to spend time downtown.

### How are you working to keep members happy and satisfied during these difficult times?

Despite relentless challenges, our member businesses have found new ways to reinvent, innovate and survive this pandemic. In turn, we have evolved and become even more nimble with our marketing efforts to match their changing needs.

We monitor consumer sentiment daily across social media platforms, which can be quite a rollercoaster, and aim to provide the latest information on themagnificentmile.com on how to navigate downtown Chicago with enhanced health and safety guidelines. Our content is rife with new keywords that didn’t exist before March 2020.

### Any last thoughts?

The past six months have been a transformative effort. Still, The Magnificent Mile Association has worked for the past 108 years to grow Michigan Avenue into one

of the great avenues of the world, including construction of the iconic DuSable Bridge through the Spanish flu in 1920. We’ve curated each detail from signage to storefronts to the width of the street and the gardens that line the public way. We will continue to shine bright through the holiday season and into the new year, representing the best our great city of Chicago has to offer.

## THE MAGNIFICENT MILE® ASSOCIATION

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## Agile Does It

The Hematology/Oncology Pharmacy Association (HOPA) had to think quickly. Its annual conference, HOPA Ahead, was scheduled for March 11–14 — and set to have its highest attendance ever. As cases of COVID-19 ballooned in the weeks leading up to the event, and an exponentially increasing number of speakers were hit with travel bans, HOPA pivoted, offering a mix of live, hybrid and virtual sessions.

/// **READ MORE** about how the association pulled off this massive switch while dealing with one new hurdle after the next at [forummagazine.org/ready-for-anything](https://forummagazine.org/ready-for-anything).



## A Digital Feat

The American Society of Neuroradiology (ASNR) had one of its most successful annual meetings ever this year — it just so happened to be the first digital meeting, too. With the help of a new supporting cast in place, ASNR was able to think creatively when having to pivot to a virtual meeting, including adding new tracks, deepening the scope of the event, creating new partner opportunities and making a concerted effort to get the schedule and topics to members earlier than normal.

/// **LEARN HOW** all these proactive changes led to record revenue generation for ASNR at [forummagazine.org/virtual-adventure](https://forummagazine.org/virtual-adventure).



## Pushing for Inclusion

2020 hasn't just been the year of associations responding to the pandemic. Many associations have taken huge strides toward furthering diverse, equitable and inclusive environments. Several associations — American College of Healthcare Executives, CCIM Institute, Society of Actuaries, American Planning Association, IL City/County Management Association and WI City/County Management Association — shared their plans for change at [forummagazine.org/forging-new-paths](https://forummagazine.org/forging-new-paths).

/// **FOR MORE INFORMATION** on how you can replicate these success stories, visit the Welcoming Environment® resource center at [associationforum.org/welcomingenvironment](https://associationforum.org/welcomingenvironment).



## Bucking the Norm

See how other associations weathered the storm that was 2020 at [forummagazine.org](https://forummagazine.org).



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# Hotel Contracts in the Age of COVID-19

BY SUSAN F. CARLSON

**Q: What has COVID-19 taught you about negotiating future hotel or event contracts?**

**A:** The word that has been used over and over in connection with COVID-19 is “unprecedented.” Meeting cancellations, hotel and convention center closures, and institutional travel bans issued in the wake of federal, state and local shutdowns have been more pervasive in number, geographic scope and length of time than in any other period in recent history. While there is an expectation that life will return to “normal” in the post-COVID era, certain effects are likely to be long-lasting and should be considered when negotiating future hotel and event contracts.

For example, with many associations having successfully conducted virtual or hybrid meetings, in-person meeting participation may have declined indefinitely. As a result, associations may no longer be able to predict future in-person meeting attendance based on past history and should consider adjusting their room block commitments accordingly. In addition, they should try to negotiate more favorable terms for unilaterally reducing those commitments in a manner that provides greater flexibility to make adjustments without triggering unmanageable attrition penalties. Similarly, associations should think carefully about the level of food and beverage guarantees in future contracts, along with whether – and, if so, when – they will have the opportunity to modify those guarantees.


Associations should also reconsider the cancellation provisions in their hotel contracts, particularly how liquidated damages are calculated. Many hotel contracts calculate those damages on a lost revenue basis, but it is fairer and more accurate to calculate the hotel’s loss on a lost profit basis. Hotels do not make \$200 on rooms with a \$200 room rate, so

they should not claim \$200 per room in damages in the event of cancellation. And, certainly, when calculating food and beverage losses, lost revenue is not the appropriate measurement when a hotel can avoid ordering food and, in some cases, also can avoid paying catering staff if they have as little as a few days’ advance notice of cancellation.

COVID-19 discussions also highlighted sometimes flawed relationships between attrition and cancellation penalties. In some contracts, attrition penalties are no less significant, and at times more severe, than the corresponding cancellation penalties. Under those circumstances, groups have a disincentive to proceed with a smaller meeting and pay attrition fees; it makes better financial sense to cancel. Neither the group nor the hotel should want that result.

Finally, one of the most important lessons learned from the pandemic is the importance of a carefully worded force majeure clause. Ideally, the clause should have the following elements:

**(i)** A broad list of events that constitute a basis for termination. In recent years, “act of God” clauses have expanded to include several specific grounds upon which termination can be based. Although the specific event that is “beyond the control of parties” — and thus forms the basis for termination — does not have to be listed, it certainly is to a group’s advantage when it is. Going forward, we suggest a fairly exhaustive list that acknowledges lessons learned from COVID-19, 9/11, extreme weather events and the like. That includes the following: acts of God; war; government regulation (including, but not limited to, executive orders); disasters; fires; earthquakes; hurricanes; disease; strikes or threat of strikes (except those



involving the employees or agents of the party seeking the protection of this clause); terrorism or threats of terrorism; public health events; civil disorders; use of the premises as a hospital or place of accommodation for medical patients, medical personnel, or homeless people within 6 months of group's arrival; curtailment of transportation facilities preventing or unreasonably delaying at least 25% of event attendees or guests from participating in the event; or other similar causes, including emergency or non-emergency conditions beyond the control of the parties.

**(ii)** A standard that allows for termination under circumstances broader than "impossibility." Force majeure provisions vary not only in their grounds for termination, but also with respect to the termination standard upon which the extent of event disruption is based. Specifically, in many cases, force majeure applies only if one or more grounds for termination make it impossible or illegal to hold the meeting or event. We recommend a broader standard, i.e., one that allows for termination if the ground(s) make it inadvisable, illegal, impossible or commercially impractical for the group to hold the event, for the hotel to provide the meeting and sleeping rooms or related facilities and/or services for the event, or for either party to fully perform the material terms of the agreement.

**(iii)** An acknowledgement that no fees or penalties are due upon termination and that any deposits paid to the hotel prior to termination are to be refunded.

**(iv)** An acknowledgement that if the group elects to proceed with the event when one or more force majeure events exist, it will not be liable for attrition, and food and beverage minimums will be waived.

**(v)** A special "COVID-19" provision for meetings booked within the next several months. These provisions are intended to allow groups to terminate if the occurrence of COVID-19 results in a communication from a government or public health authority that would restrict, interfere with, or inhibit the group's ability to hold the event or attendees to travel to and/or attend the event. With those special provisions, it is helpful to include a date, sufficiently in advance of the meeting, after which the group may terminate without penalty.

This last item raises a key issue with respect to force majeure rights during the COVID-19 crisis: the challenge of determining the "right" time to assert those rights. Generally, the party exercising force majeure rights can rely only on the facts and circumstances that exist at the time the facility is notified. Given the nature of the crisis, it is important not to terminate too early or too late relative to the event dates. If the group notifies the facility too far in advance, the facility is likely to argue that there is still opportunity for the crisis to abate and for the event to occur. Even if things get worse later, the group may be unable to rely on those changed, worsened circumstances. At the same time, the group cannot wait too long to exercise its rights because it needs to notify attendees, exhibitors, sponsors, etc., that a decision has been made.

Educational meetings and other events are integral to the livelihood of associations. Thus, it is critical that associations protect their rights in this changing market. Contracts should be drafted to involve only manageable potential penalties and allow for flexibility if and when the next "big crisis" occurs. ■



**SUSAN FEINGOLD  
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## FOCUS

There's no way around it: The world's changed. But at least one constant remains — associations are providing value to members. Much of that work hinges on reinventing meetings, with execution vastly different from pre-pandemic events.

“In today's environment, associations have the ability to provide tremendous value, so don't be afraid to try something new.”

What Does the Future Hold for Conferences?  
*pg. 28*

“COVID-19 has put a spotlight on our profession and positioned many of our members front and center as experts in occupational health in their workplaces and in the forefront of the country's public eye.”

A Call to Action, *pg. 22*

# Meeting the Occasion

“There are so many silver linings. I think the future is really bright — so much innovation and better events that are going to be so much more profitable.”

Remote Earning, *pg. 14*

The pandemic may have crushed in-person conferences, but associations can still supercharge revenue with digital events.

# REMOTE EARNING

*By Maggie Callahan*







As the clock struck midnight on Jan. 1, 2020, associations readied themselves for the year's big plans. Calendars were dotted with in-person meetings, and conferences had been planned around the country and the world.

Events looked like they would continue to be a large chunk of associations' non-dues revenue, thanks to members' appetites for live events. New and exciting tech trends were emerging to even further boost member engagement and internal revenue, with event organizers exploring in-person event apps and virtual reality experiences — all primed for sponsorship opportunities. All these events and their accoutrements were sure to boost associations' non-dues revenue.

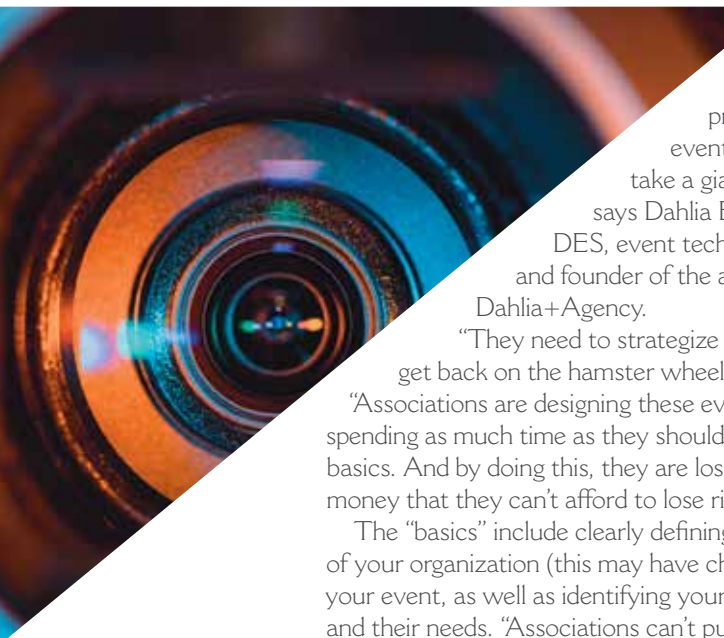
And then the COVID-19 pandemic turned plans upside down. Some associations canceled their events outright. Others postponed, and some quickly turned their events virtual. By many metrics — international attendance rates, quick tech adaptation — a lot of these online-only events have been successful. But, at the end of the day, meetings are one of associations' largest sources of non-dues revenue, and they simply must generate money.

Of the associations that held virtual events in the preceding year, only 27% of the events generated any revenue, and of that 27%, only 12% brought in more revenue than their previous in-person event, according to a Wild Apricot survey published in August, "The Virtual Event Research Report for Membership Organizations 2020."

Troubling? Definitely. There is no magic recipe to transform a once-successful in-person event into a money-making virtual replica. But there is a path forward: Digital event experts have weighed in, and with the following advice, they say that a financially gainful virtual event can be yours for the taking.



## Redefine everything.



Before any association scrambles to produce a digital event, it needs to take a giant step back, says Dahlia El Gazzar, DES, event tech evangelist and founder of the agency Dahlia+Agency.

“They need to strategize before they get back on the hamster wheel,” she says.

“Associations are designing these events without spending as much time as they should revisiting the basics. And by doing this, they are losing a lot of money that they can’t afford to lose right now.”

The “basics” include clearly defining the focus of your organization (this may have changed!) and your event, as well as identifying your stakeholders and their needs. “Associations can’t put this work off any longer. Because we are in a global pandemic, everybody’s priorities have taken a detour. So even if you think you know your member base — no, you don’t anymore,” says El Gazzar, who is also a subject matter expert and instructor for the Digital Event Strategist course from the Professional Convention Management Association (PCMA).

Along with members, associations need to define the other key players in their events — attendees, board members, \$500-level sponsors, \$1 million-level sponsors, exhibitors — and ask, “What do they want to step away from the event with? Connections? Content? Business leads? What type of content do they want to absorb?” All of the answers you come up with should become a part of your overall event design, El Gazzar says.

Zibby Aman, director of learning and development for the Ambulatory Association, says digging deeply to understand members should help associations answer the question, “Why are we having a digital event?” For the most part, an association attendee is looking for education, networking or, sometimes, both, she says. “We are trying to serve all of these people at once, and it’s a lot more than we can chew,” says Aman, who formerly worked for the PCMA and managed the team that created PCMA’s Digital Experience Institute.

**“Associations are designing these events without spending as much time as they should revisiting the basics. And by doing this, they are losing a lot of money that they can’t afford to lose right now.”**

—DAHLIA EL GAZZAR, DES, DAHLIA+AGENCY

Lee Gimpel, founder of Better Meetings, a meeting design, facilitation and training company in Washington, D.C., agrees.

“It may be a hard truth for conference organizers to confront, but more events need to take an honest look at what part of their event really drives attendance and gets people to pull out their wallets,” Gimpel says.

## Shift your mindset.

Once your association has evaluated stakeholders and has a clear event objective in mind, it’s time to forget almost everything you thought you knew about events.

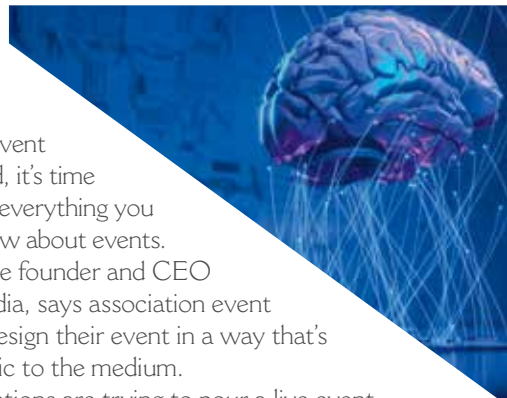
Don Neal, the founder and CEO of 360 Live Media, says association event planners must design their event in a way that’s incredibly specific to the medium.

“Many associations are trying to pour a live event through the lens of the digital event,” he says. “A live, in-person event is as different from a virtual event as a Broadway play is from a Hollywood film.”

There is no way to replace the organic nature and feeling of walking through a meeting hall and greeting your colleagues face to face. As such, associations must accept that digital events will never be able to replicate an in-person event, Aman says.

“Can a digital event be better? Yes. More interesting? Yes. Accomplish your goals? Yes. Can it be a direct copy and paste of a live event? No,” Aman says. “The goal now should be to leave attendees with a similar feeling as if they had gone to an in-person event. Did they get the education they wanted? Did they feel energized with business ideas? What happens for the end user?”

Designing for the medium means that associations will have a more compelling product when they reach out to attendees and sponsors. “They need to sell the features and the benefits,” Neal says. And to do this, an event organizer must design for the four dimensions of an event: physical, physiological, emotional and intellectual. The dimensions aren’t different from an in-person event, but how you can achieve them is.



“There is no shortage of cooking classes, dancing lessons, dueling pianos, art lessons and more available online,” Neal says. “Adding experiential elements to your event creates great opportunities for people to connect while doing something that is activating all senses and also learning something new.”

Neal says you can also engage the community and help members connect by asking them to share things they have learned or any special skills, or to provide tours of their homes — the possibilities are endless. The key is to create the conditions for audience interactivity and not just deliver a one-way broadcast.

One effective way of designing for the event — and getting more attendees — is to challenge the conventions of an event schedule. While in-person events may be three full days of sessions, with group lunches and nightly cocktail hours, virtual events can offer more freedom and appeal to attendees.

“Why couldn’t your event content be presented for two hours a day, every day, for two weeks?” says Aman. “In your strategy, why can’t education and networking be separated out? You could build outside of the meeting schedule for those who want networking. Could you have happy hours? Virtual business card trading? Braindates to link up people who want to explore the same topics?” (Braindate is a peer-learning app that connects like-minded people who want to discuss the same topics during an event.)

For many, the prospect of sitting on a full-day Zoom conference and then grabbing a drink to connect — again on Zoom — sounds tiring and tedious, Aman says.

Revamping schedules and thinking like an attendee has benefits for everyone, even sponsors. “Now we’re seeing five- to 10-day events, and we’re building scheduling around people’s schedules,” Neal says. “It keeps them engaged longer, and it allows industry partners to have enough airtime to really engage with the audience.”

## Forget free admission.

Because meetings and events are a huge piece of the non-dues revenue pie, economic strategy has to be interwoven into the event design. And when it comes to how much you should charge for your online event, all experts have the same advice: You cannot give it away for free.

“The conversation is becoming, ‘Are we charging the same for digital?’” Aman says. “Is the content relevant? Is it still delivering the same quality of speakers and the same level of depth and information? If yes, then why would you charge a fraction of the price?”

Neal agrees. “Most virtual events have been operating free or not sustainably. I don’t believe there are going to be full, robust, in-person events until 2022, and if that’s the case, they can’t not charge.” Estimates reveal that approximately 80% of early virtual events did not charge for registration.

He says how much an association can charge depends on the industry. For example, an association whose members have to attend to earn accreditation can charge nearly full price. But if your in-person price tags were factoring in big brunches, happy hours, famous speakers and elaborate swag that you are no longer offering, you can’t charge for that, Aman says.

As a general rule, Neal recommends aiming to generate 20% to 30% of your desired virtual event revenue from registration. Also, beyond registration fees, many associations have seen success with a donation page. Wild Apricot’s survey revealed that organizations that successfully generated revenue through virtual events were 46% more likely to use a donation page than their unsuccessful counterparts.

Some optimistic news to keep in mind as you’re planning is that a virtual event, in general, costs less to produce than a live counterpart. The Wild Apricot survey found that 84% of organizations that had already held a virtual event reported that they spent less than they would have on an in-person one.

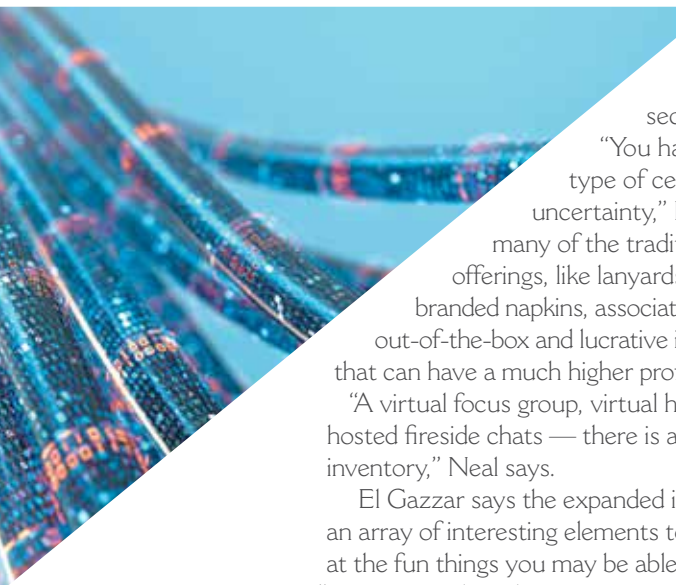
“When you compare your costs, success looks very different when you only pay for the platform and speakers,” Aman says, adding that platforms generally run \$30,000–\$80,000 for about 300–500 attendees.

For any event organizers worried that fees will deter sign-ups, Gimpel recommends giving attendees a taste of a larger conference by exposing them to smaller events in advance.

“For example, if your association does a monthly webinar series and it lacks any sort of engagement and isn’t particularly compelling, then it’s hard to see why someone should trust this organization, buy a ticket that costs hundreds of dollars and spend a few days attending a virtual conference,” he says. “On the other hand, if you can show people that your smaller monthly events are valuable, it’s an easier argument that your big event will be great as well.”

And remember, attendees who would have been traveling are saving the price of lodging and airfare.

## Get creative with sponsorship.



Securing sponsors is as much of a conundrum as securing attendees:

“You have to have some type of certainty in an era of uncertainty,” Neal says. Without many of the traditional sponsorship offerings, like lanyards, tote bags and branded napkins, associations can create more out-of-the-box and lucrative inventory — options that can have a much higher profit margin, he says.

“A virtual focus group, virtual hosted buyer, virtual hosted fireside chats — there is a lot of good inventory,” Neal says.

El Gazzar says the expanded inventory can bring an array of interesting elements to your event. “Look at the fun things you may be able to offer,” she says. “You can work with escape rooms or a puppy cam, and you actually can have sponsor logos on swag in the puppy cam room.”

Ask sponsors what they want. Think of a big-name sponsor, and pitch to them that you are going to have a “room” full of their target audience. “You can ask, ‘Do you want to come in with a llama?’ That’s a thing,” El Gazzar says. “Imagine a Zoom with 50 people, and a llama comes up. It’s beautiful.”

Other sponsorship opportunities include the previously mentioned sensory experiences, like

cooking classes, art lessons or wine tastings. For instance, El Gazzar says, you could partner with a Napa Valley winery and schedule a virtual wine tasting. Ask attendees whether they prefer white or red, and then on the day of the event, a FedEx delivery shows up on their doorstep with the wine, so they are all set at tasting time.

Experience boxes, which attendees slowly unpack during the course of an event, are another option. Or you could send out sponsored activities, like jewelry kits or printable coloring pages to attendees with kids who are at home e-learning while their parent is attending the event. Completing your initial research on your member base — your sponsor’s audience — affords your sponsors these opportunities to meaningfully reach them.

“It’s a very different ROI for sponsors,” Aman says.

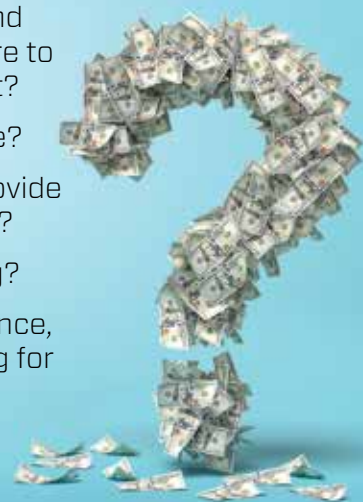
Thinking beyond the confines of your event timeframe, Neal says to be open to the potential of a year-round commercial B2B model, allowing exhibitors and sponsors to be a part of the industry for education, exhibitor demos and other events.

A word of warning: Just as associations have learned the hard way about charging for attendance, they have also uncovered some sponsorship don’ts. Gimpel cautions associations to be extremely clear about what they are offering sponsors, especially for something like promising interaction with an audience during a networking session.

“Don’t tempt exhibitors with the idea of meeting with potential customers if the best they’re going to get is a chat box,” Gimpel says. “I’m more interested

## 10 THINGS TO CONSIDER WHEN PRICING YOUR EVENT

1. What is the ultimate goal — revenue? Attendees? Something else?
2. What are your break-even costs?
3. How has your audience been affected by this situation?
4. What kind of barriers to entry does your audience have for a virtual conference?
5. Do you have time to try out different pricing levels?
6. Do you offer enough creativity and variability in your pricing structure to best serve each audience cohort?
7. What value-adds can you include?
8. Do you have the resources to provide ongoing content or engagement?
9. What are your competitors doing?
10. Is this a one-time virtual conference, or will this become a new offering for you in the future?



Source: 360 Live Media, “Association Guide to Launching a Virtual Conference”



in a representative of the sponsorship company actually meeting a dozen additional attendees who could be potential customers and having real, meaningful conversations with them.”

## Don't go it alone.

For many associations, conducting the first virtual event is more than they are prepared to do. This is where consultants can play a vital role.

“Ask, ‘What am I going to have to outsource?’ If there is a skill gap internally — strategy, research, business opportunity or event design — you need to outsource if you can. You need to lean on those who know how to do it,” El Gazzar says.

Just finding the proper platform to fit your event design can seem overwhelming, so having an experienced digital consultant to guide you in the selection process can be invaluable.

“There are limitations on the digital platforms. Many times, we have to put two or three together to get the right combination of Q&A, polling, chat and networking,” says Neal, whose company has evaluated 120 platforms and has yet to find a one-size-fits-all solution.

For associations without the means to hire a digital event consultant or planner, they can effectively leverage their organization’s internal expertise. “Build a multi-dimensional team, and bring in someone from marketing, IT, legal, business development and education,” Aman says. “That’s the cheap way to do it. Make the internal decisions, and then go out for platforms.”


When it comes to finding the most appropriate platform without the aid of a consultant, Aman says the easiest thing to do is to reach out to other associations, as many have already executed a digital event this year. She says PCMA’s discussion board, Catalyst, is one such place to do this.

“People want to help each other, and this is a great time to start building those connections,” she says. “I find that if you go into [Catalyst] and ask a question, like, ‘How did you conduct your Q&A?’” you’ll get at least five responses from others happy to share. Now is not the time to be siloed and isolated.”

## Looking to 2021

As associations look to 2021 and try to gauge the events landscape, Neal says that valuable events will likely be hybrids, mixing in some social media platforms and a version of a live event. “A live central hub may be 50 people socially distanced in a large ballroom, but there is going to have to be some live component,” he says. Until these blended events are a reality, virtual events give associations the opportunity to work on their technological prowess. And even when in-person events are booming again, the experts hope that associations will remember the lessons they’ve learned and continue to implement the lucrative pieces of a virtual event.

“It’s important to ask what an event doesn’t need to carry over online — as well as what could be new, different and valuable if we’re not bound by time and space as we would be in a convention center,” Gimpel says. “In a number of respects, a virtual event can actually deliver more value than one that’s in person.”

Adds Neal, “There are so many silver linings. I think the future is really bright — so much innovation and better events that are going to be so much more profitable.” 

MAGGIE CALLAHAN IS A CHICAGO-BASED WRITER AND EDITOR.

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# A CALL TO ACTION



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COVID-19 thrust a professional association's members into the national spotlight.

*By Candice Warltier*





After COVID-19 hit, it was clear that 2020 was not going to be the same for associations. In fact, according to a study conducted by CS-Effect and Researchscape, 66% of association executives indicated they converted their live event to a virtual meeting this year, with another 12% canceling altogether. Many quickly learned the challenges of developing virtual programming and focused on engaging members through webinars (84%) and more frequent e-communications (75%), according to the survey.

While associations continue to struggle with engaging members in new ways, the American Industrial Hygiene Association (AIHA) has turned the challenges of COVID-19 into an opportunity to connect and develop a renewed sense of energy for its 8,500 members. It hired CS-Effect to help shift focus from programming to supporting the profession and demonstrating value. In many ways, AIHA leveraged COVID-19 to become more introspective and realigned its strategies to serve its members in ways never possible before the pandemic.

AIHA is an association for scientists and professionals committed to preserving and ensuring occupational and environmental health and safety (OEHS) in the workplace and community. Founded in 1939, the association supports members with expertise, networks, comprehensive education programs and other products and services that help them maintain the highest professional standards. AIHA serves as a resource for people employed across the public and private sectors, as well as for the communities in which they work.

AIHA members were among the first professionals to see the impact of COVID-19 when the pandemic infiltrated companies. Many members were forced to develop risk mitigation plans to keep employees safe from COVID-19 while continuing to work.

As Richard Fulwiler, Sc.D, CIH, FAIHA, instructor at Harvard School of Public Health explains, “We need to leverage this opportunity. Most people have never heard of PPE [personal protective equipment] until now, and OHES [occupational health and environmental services] professionals are the experts in understanding the proper use of PPE.”

Dr. Fulwiler was not the only member to express interest in leveraging this unique opportunity. AIHA

received calls from members — who were spread out across the nation and represented all industries — indicating their frustration with the national news miscommunicating the proper use of PPE. As a result, AIHA launched a national campaign to educate the public about a variety of issues.

That included proper use of PPE, guidance on cleaning and disinfection, engineering controls to improve indoor air quality, reopening protocols for buildings closed due to the shutdown and more.

AIHA proactively reached out to journalists, encouraging them to speak with AIHA members. A group of members volunteered to serve as spokespeople representing specific industries and various expertise. These experts shared their experiences and knowledge at a time when previous exposure to mass media was limited at best. AIHA recognized this opportunity to share with the world what they realized all along: Workplace health and safety are a systemic force toward economic security. Safe and healthy workplaces maximize output and minimize risk (and all that comes with it).

According to AIHA CEO Lawrence Sloan, “COVID-19 has put a spotlight on our profession and positioned many of our members front and center as experts in occupational health in their workplaces and in the forefront of the country’s public eye.”

As a result, AIHA secured national news stories in *USA Today*, *The Wall Street Journal* and more. However, positioning AIHA members as experts in PPE was only the beginning. AIHA was interested in developing industry-specific guidelines on how companies could reopen their businesses safely. Members generously dedicated hundreds of hours to develop valuable resources for employers seeking to reopen their buildings and protect their workers and customers from COVID-19. The Back to Work Safely Task Force consisting of 25 members, plus a COVID-19 ad hoc committee of approximately 30 volunteers, formed in April and were charged to work with already-established committees such as the Indoor Environmental Quality Committee and the Non-Ionizing Radiation Committee to develop guidance documents, infographics, white papers and fact sheets.

AIHA leveraged COVID-19 to become more introspective and realigned its strategies to serve its members in ways never possible before the pandemic.



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One major initiative that these committees undertook was the Back to Work Safely project. The committees worked together to develop guidelines ([backtoworksafely.org](https://backtoworksafely.org)), including recommendations on ventilation, personal hygiene, physical distancing and enhanced cleaning. The target industries, services and facilities include:

- Amateur sports
- At-home service providers
- Bars
- Business services
- Childcare providers
- Construction
- Dentistry
- General office settings
- Gyms and workout facilities
- Hair and nail salons
- Houses of worship
- Institutions of higher education
- K-12 schools
- Libraries
- Massage therapy
- Museums and collecting institutions
- Physical and occupational therapy
- Retail
- Restaurants
- Rideshares, taxis, limos and other passenger drivers-for-hire
- Small manufacturing and maintenance shops
- Small entertainment venues (e.g., mini golf and arcades)
- Small and medium sports facilities
- Small lodging establishments
- Street vendors and farmers markets
- Transit systems
- Warehousing/transportation

In addition to authoring guidelines, AIHA received requests for members to speak at virtual conferences on COVID-19-related topics, including Chain Store Age's SPECS virtual conference. Here, AIHA secured a member volunteer, David Krause, Ph.D, MSPH, CIH, immediate past chairman of the AIHA Indoor Environmental Quality Committee, to share his expertise on best practices for retailers, including how specific changes to the operation and filtration of heating, ventilation and air conditioning systems can reduce airborne exposure to COVID-19 and other viruses.

The global pandemic has proved to be a driving force in engaging members who had never volunteered. AIHA reflected on its priorities and recognized the need to make changes midcourse. Staff and volunteer leaders pushed their established strategies aside and instead elevated the needs of the profession. In doing so, this association

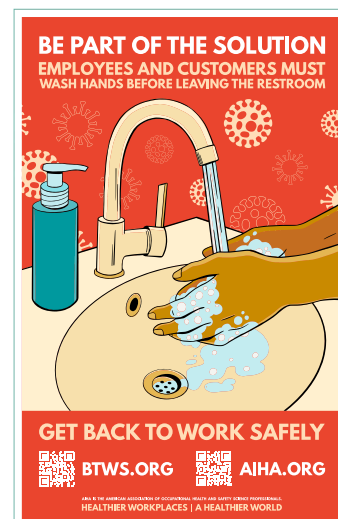


demonstrated strong action and responsiveness to its members during an unprecedented time and undoubtedly increased the loyalty, affinity and engagement among its members.

While leading an organization during a pandemic raises new and difficult challenges, in the case of AIHA, it has also produced some of Sloan's most rewarding experiences.

"I am so proud of our volunteers for their invaluable input and action to help make the world a healthier place during this uncertain time," he says. Sloan believes the future is bright for AIHA members, which means a bright future for everyone's health and safety as well. **F**

CANDICE WARTIER IS THE FOUNDING PARTNER OF CS-EFFECT.



AIHA developed industry-specific guidelines on how businesses can reopen safely.

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# WHAT DOES THE FUTURE HOLD FOR CONFEREN

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# CES?

COVID-19 disrupted  
2020 conference plans.  
What will 2021 and  
beyond look like?

*By Hanna Aronovich, CAE*

For most associations, conferences are a significant driver of non-dues revenue. Annual conferences and other events are a primary way for associations to build engagement with members and meet members' needs for continuing education. Plus, conferences and events serve as valuable touch points to attract nonmembers.

Although virtual conferences are not a new concept, the COVID-19 pandemic has accelerated their growth. This year, event planners had to choose between canceling their 2020 events or quickly pivoting to a virtual format.

According to an April 2020 survey of members of the Professional Convention Management Association, 87% of event organizers said they canceled an event as a result of COVID-19. When asked about future events, 70% said that some or all of an upcoming face-to-face event would be moved to a virtual platform. Although virtual events are on the rise, most of the survey respondents (62%) did not worry that virtual events would cannibalize in-person events.

It is still unknown whether events in 2021 will be able to resume in person as they had in the past. And even if some events can resume, a demand for virtual options will continue for quite some time.

To help guide your association's event planning strategy for 2021 and beyond, Lisa Burton, CMP, senior vice president at Meeting Expectations, shares her insights.



# 6 WAYS ASSOCIATIONS ARE REIMAGINING MEMBER BENEFITS AND EXPERIENCES

Meeting Expectations Vice President Beth Chitnis, CAE, and Senior Education Manager Ashley MacDermott, MPH, CHES, share how associations are reinventing member benefits.

**1 Virtual — but local — in-person training.** One association shifted 60 in-person training sessions for members to virtual classes. However, the association retained the local aspect of the events by coordinating registration with the local chapters. “The training classes had always been offered in person, but we were able to offer virtual sessions so that attendees could still connect with other local members,” Chitnis explains. “It was very successful.”

**2 New online special interest communities.** “One of our clients had been beginning to explore creating special interest groups but hadn’t yet done so,” Chitnis says. “This was the perfect time for them to begin offering special interest communities, and they launched them in an online format.”

**3 Online happy hours or office hours.** Many associations have introduced weekly or monthly happy hours to foster networking desired by many members. One association took a unique approach and introduced online office hours, so members could connect with association staff and leadership. “We’re finding that these virtual networking sessions are allowing associations and their members to engage even more now than they had in the past,” Chitnis notes.

**4 Open access to member resources.** Many associations restrict certain resources to members. However, one association made the decision to make some of its critical infection-control resources available to everyone. “By allowing open access to member-only resources, associations can reach a broader audience and deliver value in a time of need,” says MacDermott.

**5 Virtual educational breakout sessions to foster more participation.** By holding virtual educational breakout sessions, associations might find that attendees are more engaged. “During an in-person session, only one attendee can generally speak at a time,” Chitnis says. “But with a virtual session, all participants can submit questions or comments, so the moderators can hear from more people and invite them to share with the group.”

**6 Virtual exhibit halls.** Many meetings and conferences have gone virtual in 2020, including virtual exhibit halls. “Some attendees might not feel comfortable walking up to a person at a booth in an exhibit hall,” says MacDermott. “But with a virtual exhibit hall, it takes away the intimidation factor, and attendees can reach out on their own terms to access exhibitors’ videos, brochures and more.”

**FORUM: At Meeting Expectations, you work with hundreds of clients for their meeting and event-planning needs. Based on what you've seen with clients and within the industry in recent months, what should associations be thinking about for 2021 and even 2022 conference planning?**

**LB:** Associations should be looking at all conference options: face to face, hybrid and all virtual. There are so many options that can engage and retain members. In today's environment, associations have the ability to provide tremendous value, so don't be afraid to try something new. We've seen tremendous success for some of our association clients by reimagining how to

deliver member benefits. Work with your event management team to plan for all scenarios and prepare accordingly.

**FORUM: Some surveys have shown that the main reasons people attend in-person conferences are for the education, destination and networking. In your experience, have you found this to be true?**

**LB:** All three are important, but networking and education rise to the top over destination. Networking, in particular, tops the list because conferences provide rare opportunities for in-person interaction



said they canceled an event as a result of COVID-19.



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and social engagement with peers or mentors. Online meetings can't replace that in-person connection. In our view, the desire to network will be the primary driver behind the return of in-person events.

**FORUM: What do attendees look for in a virtual event compared to an in-person event?**

**LB:** Much of what an attendee seeks is the same: valuable content, networking, educational and engagement opportunities. There is a need for some event design differences, such as shorter days and sessions, and fewer casual networking opportunities with virtual events. However, attendees still seek an engaging experience. For instance, when we are planning a virtual event, we approach selecting the technology like we do sourcing a venue — all of the elements that make the event a valuable experience build on that foundation.

**FORUM: What are some of the ways organizations are building socialization or networking opportunities into virtual conferences?**

**LB:** There are so many ways to build in social opportunities — from the simplest online happy hour to more technology-dependent gamification features. It doesn't have to be complicated to be effective. You can get people excited by incorporating trivia or feature a mixologist making a fun cocktail that attendees received in a kit prior to the event.

For instance, for a technology user group conference, we took the same small group approach that would have happened in person and translated it to online special interest group happy hours. Another approach that facilitated networking was hosting small group "meet the speaker" events after a session to continue the conversation or creating opportunities to meet board members that most attendees typically wouldn't interact with.

For career fair or expo hall events, we're starting to use platforms that feature avatars and/or a virtual space that resembles a tradeshow. Attendees can meet with exhibitors online and feel more like they are in the physical space.

**FORUM: Time can be one of the barriers for attending a conference, whether it's in person or virtual. When structuring a virtual conference, have you found attendees prefer to have the agenda spread out over more days with fewer sessions per day, or do they prefer a full-day agenda?**

**LB:** Overall, we find that people prefer shorter days, as well as shorter sessions and breaks in between, instead of one full day. People are trying to balance working from home by managing distractions and don't always feel like they can step away like they would at an in-person event. One of our recommendations is to suggest participants put on their out-of-office messages, just as they would if they were attending a live event.

Extending a program by a day or two can also drive more attendance for those unable to participate every day. It's better than an all-or-nothing approach.

**FORUM: What other considerations should associations keep in mind when developing a virtual conference?**

**LB:** If the conference includes international attendees, different time zones can be tricky but need to be considered. Staffing requirements may increase based on the number of parallel sessions.

Don't get so focused on the technology that you neglect the human factor: Engagement and experience matter.



**LISA BURTON, CMP,** SENIOR VICE PRESIDENT

MEETING EXPECTATIONS

BURTON SERVES AS SVP OF THE MEETING MANAGEMENT BUSINESS UNIT OF MEETING EXPECTATIONS, A PROFESSIONAL SERVICES FIRM THAT PROVIDES MEETINGS AND EVENT PLANNING, ASSOCIATION MANAGEMENT, STRATEGIC CONSULTING AND MARKETING COMMUNICATIONS SERVICES.



**FORUM: Do you think hybrid conferences offering both in-person and virtual attendance will become more popular in the future?**

**LB:** Time will tell. This tends to be the thought from most in the industry, as a transition to get back to full, in-person meetings. We are currently planning a hybrid event for one of our largest association clients, knowing that we need to be prepared to provide attendees with choices that meet their needs.

One thing to keep in mind is that a hybrid conference is essentially running two conferences in one. They can also be quite complex when projecting the number of face-to-face versus virtual attendees.

**FORUM: Do you have any other advice or thoughts to share about what conferences in 2021 and beyond might look like?**

**LB:** The in-person conferences are already changing in some ways, limiting or eliminating buffets, modifying spaces and room layouts, and more.

Conference planners will continue to need to work closely with their contracted property for the short term, as the virus continues to be with us. If you are planning a face-to-face event, recognize that there may be travel budget cuts and restrictions. Above all, be proactive and transparent with your membership as you plan — and be prepared to adjust the plans. **F**

HANNA ARONOVICH, CAE, IS THE CHIEF MARKETING & COMMUNICATIONS OFFICER FOR THE DENTAL ASSISTING NATIONAL BOARD.



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# Prep School

THE MOVE TO DIGITAL-ONLY EVENTS  
REQUIRES NEW SKILLS AND  
PREPARATION FOR SPEAKERS.

BY MYRNA TRAYLOR



As COVID-19 continues to make it difficult, if not impossible, to hold events in person, associations are relying on virtual events to engage members. Some aspects of in-person events easily translate to an online format, but there is a lot of rethinking, reorganization and preparation that has to happen to make

a digital event successful. That's especially true for speakers.

Speakers who have made multiple presentations at live events likely feel very comfortable with the format. They've handled various types of microphones and lighting configurations, know how to engage (or disengage) with audience

members and can deal out the slides in their PowerPoint decks like veteran Vegas blackjack dealers. But presenting virtually is quite different.

Arianna Rehak is CEO of Matchbox Virtual Media, a Montreal-based firm that specializes in all aspects of virtual event planning and production. She says that speakers who are not as savvy with virtual presentations might be nervous about the change in setting. “There is a subset of people who are really anxious about having to do this. Some of them are doing virtual events for the first time; a lot of them had already had their plan and publication ready to go for an in-person event, and now they’re having to move to virtual. So, they need to learn about the new technology and how that’s going to work. They also need to learn, ideally, best practices for virtual engagement and for presenting virtually because it works differently.”

Rehak also points out that it is not only the speakers who are getting used to new circumstances — the association hosts and facilitators might also have to become instant experts in this new environment. She advises that event coordinators take as much time as possible to think about what they would want to know if they were the speaker because as soon as the invitation to the presenter goes out, there’s going to be an onslaught of emails with questions about how everything is going to work.

Developing a playbook that addresses everything from logistics to wardrobe can help. Additionally, writing out answers to FAQs will allow you to respond quickly to speaker queries, or better still, anticipate issues they might not think to ask about.

### Lines of Communication

“It’s a lot of information [for speakers] to take in at once,” Rehak says. “If possible, think about writing out all your communication, so you have a working template for speaker communication. It’s something you’re going to be very happy to have when it’s all over.”

Aim to strike a balance between overloading a speaker with all the details at once versus sending out a series of “drip” emails. The former risks overwhelming the speaker, while the latter might get lost in their inbox. A process checklist, preferably with dated milestones, will help

## BUILDING YOUR SPEAKER PLAYBOOK

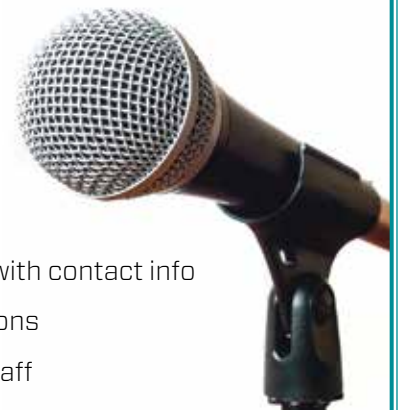
Setting expectations is an important part of working with a speaker. You will have to explain the format of the presentation and how their piece fits into the event as a whole.

For starters, provide a timeline for the preparation as well as for the event itself. If the presenter is a relative novice to the platform that will be used, they will want assurance that you can provide sufficient training to familiarize them. Build that training period into your own schedule and that of any tech liaisons you’ve enlisted to help.

Also, be sure to specify the roles your staff will be playing for the event. Who will be acting as moderator or facilitator of the virtual event? Will there be other speakers for a roundtable discussion, for example? If so, have the group meet as part of the training or rehearsal, so they are familiar with one another.

Having the following resources in your toolkit will also regularize the process and help you remember important details:

- Copyright information (especially if the presentation will be archived and accessible for a fee)
- Video training on how to record/livestream
- Tips and tricks
- Checklists
- Virtual backgrounds
- Paperwork (letter of agreement or contract, etc.)
- Rehearsal dates and times with contact info
- Links to example presentations
- Links to Q&A session with staff





## LAPTOP VIDEOGRAPHY 101

Speaking into a laptop camera, whether to record or present live, is different than presenting at the front of a room. Obviously, the main difference is that the speaker has a much more limited range of movement because they must stay within the camera frame. Here are some additional guidelines you can share with your speakers that will help them succeed with this medium.

**1 Lighting.** Light is the camera's best friend. Make sure that there is as much light as possible in the room by having natural daylight or additional lamps that are placed behind the laptop at eye level. Light should fall on the speaker's face straight-on to avoid unflattering shadows.

**2 Backgrounds.** Encourage speakers to set up with their camera facing an uncluttered, neutral background. Backgrounds shouldn't have moving objects or too many items, such as books, knickknacks or artwork that will draw attention away from the speaker. Having a bright window as a background will cause the camera to overcorrect for light balance — the speaker's face will ultimately be too dim to see. If the speaker opts for a virtual background, have them run a test to make sure it works well with their clothing.

**3 Wardrobe.** For the most part, business casual should be appropriate, but the speaker will also appreciate guidance regarding colors and patterns — which is to say, one color (or two at most) and no patterns. You may wish to encourage the speaker to take a selfie in the shirt and/or jacket they want to wear with their planned lighting and background to make sure that their face is the most interesting feature in the frame.

**4 Framing.** Ideally, the speaker's webcam should be at eye level, so they can look straight into the camera comfortably, as if they were seated across from viewers at a table or standing face to face. (An upward camera angle makes the jaw and chin too prominent.) Moreover, the speaker's eyes should rest at an imaginary horizontal line about one-third of the way from the top of the screen. This is the proportion we see frequently during news programs.

**5 Eliminate distractions.** Kids, partners or pets are unwelcome distractions during a presentation. Although it is sometimes easier said than done, speakers should do what they can to make sure they avoid visual or aural interruptions.

Additional source: "How to Prep for Speaking at a Virtual Conference." Medium. April 2020. Retrieved from: [medium.com/shiftconf/how-to-prepare-for-speaking-at-a-virtual-conference-2bb4ecfc0d30](https://medium.com/shiftconf/how-to-prepare-for-speaking-at-a-virtual-conference-2bb4ecfc0d30).

the presenter and the in-house team make sure everything is accomplished during the lead-up to the event.

The format of the presentation will dictate the preparation timeline. For example, in order to prerecord a program, the presenter will either need a camera and microphone that will deliver the preferred quality and resolution, or be able to have that recording made with a team in a COVID-safe environment and then have the video files sent to the proper person on your team for uploading. Panel discussions might also be prerecorded to allow panelists or a moderator to work with attendees in the chat function during the session.

A livestreamed videoconference can benefit greatly by having a moderator — either someone from the association or another guest host who can monitor the chat for questions or gently prompt the speaker if they drift from the presentation's purpose. This will help the speaker concentrate on the content and performance, without seeming to ignore attendees.

### Training Days

As part of your initial meetings with the speaker, explain the meeting format and goals, and identify the platform you will be using. Ask the speaker how familiar they are with the platform and if they feel comfortable with the meeting format you are proposing. If the speaker has any uncertainties, put them in touch with a trainer who can show them the ropes.

"I encourage bringing someone in specifically to train the speakers on best practices for delivery," Rehak says. "It will ease the speaker significantly to know that [training] is an option and will also allow you to answer questions that you might be receiving over time through email."

Rehak says that the best way to train is to contact the speaker on the platform that they will be using for the event. "The process of having them come in as an attendee, in the environment where


they're going to be a speaker, is going to teach them so much. Just the first 30 seconds of them logging in is going to be part of the instruction."

When looking for a trainer, Rehak recommends using someone who is not only familiar with the platform but a seasoned speaker in their own right. "We hired somebody to do all of the speaker trainings because she's been a speaker in our conferences, and she always has the highest-rated session."

The trainer should be able to show the speaker how to smoothly call up PowerPoint slides, videos or other exhibits and to do so in a way that keeps attendees engaged. The trainer should also point out features available on the platform that will help the speaker deliver a presentation that meets the session goals. For example, in addition to the chat feature, the speaker or moderator may be able to use polls or screen-sharing to interact with attendees, thereby enhancing learning or gauging content relevance in real time.

### Speakers as Brand Ambassadors

One thing to remember about working with your speakers: Try to project enthusiasm for their participation, as well as for the event as a whole. Building up the event and their part in it helps the speakers feel important but also has the potential to draw more eyes and ears to your association. "The speakers are a subcommunity in a larger set coming together for this event," Rehak says. "Speakers in a lot of these industries are major influencers in their spaces and are usually pretty active within the association. Making sure that they have a really good experience is going to be beneficial to the larger success of the event because they're going to speak about it from such an authentic place when they're talking to their colleagues."


And nothing beats good word of mouth — even if it's digital. 



**ARIANNA REHAK,**  
CO-FOUNDER  
AND CEO

MATCHBOX  
VIRTUAL MEDIA

MYRNA TRAYLOR IS A  
CHICAGO-BASED WRITER  
AND EDITOR.

 **Arianna Rehak**, CEO of Matchbox Virtual Media, was also a co-presenter for a webinar on how to prep speakers for effective content delivery at virtual events. Check out the webinar at: [pathlms.com/association-forum/courses/21283](https://pathlms.com/association-forum/courses/21283).



## First-ever Virtual Forum Forward an Overwhelming Success

From yoga to live video chats to panels of industry influencers, Forum Forward 2020 delivered a full-day experience. Although attendees joined virtually — from home, from an office or somewhere else — the conference experience was as compelling as an in-person event.

Nikki Golden, CAE, strategist for Association Laboratory, Inc., said: “Great job, Association Forum. This is exactly what we needed right now. Great content, and great to be able to do some of the live networking. Love ending with a wellness session!”

Association Forum’s education team pulled off a one-of-a-kind event that had all the trappings of an in-person experience. They knew that an all-day online conference could be draining, which is why they incorporated plenty

of breaks and wellness content. But they were also contending with the use of new technology. CadmiumCD provided a sleek meeting platform that was far more robust than your typical webinar. Since many attendees were new to this format, Association Forum hired Karen Millsap to facilitate the meeting and guide everyone through the platform.

Millsap’s high energy and conversational tone provided continuity to the day. She introduced the keynotes, offered tips on using the discussion and question features, and she popped in to tell attendees when to take a break or go grab lunch. By the end of the day, Millsap felt like a friend you were experiencing the conference with — exchanging notes and reactions to sessions.

This year’s theme was “Focus Your Future,” yet the underlying theme of

many presentations was how to remain focused despite these uncertain times. Presenters struck a balance between providing insights into moving forward and also recognizing the challenges of this past year, given the pandemic, financial crisis and social justice movement.

Attendees may have missed the free food and handshakes this year, but they didn’t miss any of the education. Forum Forward 2020 was an overwhelming success. This conference was the culmination of Association Forum’s tireless efforts to deliver top-notch education no matter the circumstances. The success of this event is a win for not only Association Forum, but the entire association community. As an industry, associations are stronger than ever and well-prepared to weather this storm.



## Million Dollar Round Table (MDRT) Announces 2021 Executive Committee



The 2021 MDRT Executive Committee focuses on supporting the industry, its members and its clients during unprecedented times as Ian Green, Dip PFS, takes his place as 95th president, and Gregory Gagne, ChFC, joins as secretary. The leadership

team aims to empower members and their clients to come out ahead of the global crisis.

Green succeeds Regina Bedoya, who will become the immediate past president. Randy L. Scritchfield, CFP, LUTCF, and Peggy Tsai, RFP, CCFP, will move into their new roles as first and second vice presidents.

Now, more than ever, the 2021 Executive Committee has its sights set on providing support for industry professionals including flexibility for current and aspiring members to offset external challenges.

Founded in 1927, MDRT is a global, independent association of more than 65,000 of the world's leading life insurance and financial services professionals from more than 500 companies in 70 nations and territories.


## American Bar Association Deputy Executive Director Will Be Missed by Association Community

James Dimos, deputy executive director and general counsel for the American Bar Association (ABA), passed away in early August. He was intensely dedicated to the legal profession and the ABA.

As the deputy executive director, Dimos served as "second in charge" of the association's staff, and through the years he was directly responsible for several functional areas, including membership, the professional services division, legal education and admission to the Bar, the Center on Public Interest Law, strategy development and the operations of the Chicago and Washington, D.C., offices. He was the guiding force of the development and deployment of the ABA's member value proposition in 2018. He also served on the Board of Governors and on the Executive and Finance committees, chairing the Finance Committee in 2012–2013.

Dimos served in private practice for about 30 years. He focused on the litigation needs of the business community in the areas of intellectual

property, competition and media law. He represented a significant number of Fortune 100 companies, especially those in the technology and media industries. Dimos was recognized as one of the Best Lawyers in America® in "bet-the-company" litigation, and he was named Indianapolis Intellectual Property Litigator of the Year in 2015. In addition, he served as president of both the Indiana State Bar Association and Indianapolis Bar Association, and as a member of the Indiana Supreme Court's Pro Bono Commission.

Dimos was a tremendous, loving family man. He was very proud of his wife, Kathy, and their three children, Stephanie, Jennifer and Jonathan. His family always brought a smile to his face and to his heart. 



# MEMBERSHIP

## Promotions and Changes

**Amy Thomasson, DES**, is joining the American College of Medical Quality (ACMQ) as the group's executive director. She will also serve as vice president of marketing and membership for Affinity Strategies. Thomasson calls this position her "dream role" and encouraged others in a post on LinkedIn: "2020 has been wild and winding. For those of you looking for your



next opportunity, keep going. This role is the culmination of two years of relationship building."

ACMQ is the organization for healthcare professionals responsible for providing leadership in quality and safety outcomes who want or need the tools, experience and expertise to improve the quality and safety of patient care.

## New Association Forum Members

### Individual Members

**Matthew D'Uva**, FASAE, CAE, AASLD  
**Stephanie Lass**, Plumbing Manufacturers International  
**Lydia Riesch**, Association of Equipment Manufacturers  
**Raven Solomon**, Raven Solomon (speaker, entrepreneur)  
**Christina Tomaso**, AOSSM

### Forum Plus Members

**Meredith DeKock**, Academy of General Dentistry  
**Erica Berg**, Association Management Center  
**Mikhail Spector**, CCIM Institute  
**Dave Naso**, Chicago Association of REALTORS  
**Mary Huang**, International Association of Defense Counsel  
**Smruti Rajagopalan**, Million Dollar Round Table  
**Jim Unander**, Million Dollar Round Table  
**Daniel Hug**, Selected Independent Funeral Homes  
**Leslie Kowalczyk**, Selected Independent Funeral Homes  
**Susie Toro**, Society of Actuaries  
**Mollie Weinstein**, Society of Critical Care Medicine

## New CAEs

Congratulations to all the new Illinois CAEs who passed the summer ASAE exam.

### Julie Belloli, CAE

Manager, Member Engagement  
 HR Source

### Anthony Conant, CAE

Chief Executive Officer  
 American Rental Association

### Emily Harris, CAE

Marketing Manager  
 Association of Nutrition & Foodservice Professionals

### Stasia Kocon, CAE

Accounting Manager  
 American College of Healthcare Executives

### Karl Michael Phipps, CAE

Director of Communications & Marketing  
 Society of Tribologists and Lubrication Engineers

### Brian Reilly, CAE

Chief Operating Officer  
 American Society of Anesthesiologists

### Katie Schmitz Scott, CAE

Association Manager  
 SmithBucklin

### Siri Sorensen, CAE

Senior Project Manager  
 International Association of Healthcare Central  
 Service Materiel Management

### Bryan White, CAE

Account Executive  
 Bostrom

### Katherine Wochos, CAE

AQI Director of Operations  
 American Society of Anesthesiologists



# CALENDAR

IN THE KNOW

## NOVEMBER

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

Nov. 4, 2020  
9 a.m. to noon CT  
CAE credit hours: 3.0  
Fee: \$149 for members; \$199 for non-members

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

This course is part of the Association Management Essentials series designed to meet the needs of entry- and mid-level employees. This series consists of half-day explorations into core management essentials to build association potential. Other courses in the series include Membership 360, Associations and the Law.

## DECEMBER

### Holiday Showcase

Dec. 15 – 16, 2020  
Early bird fee through Nov. 13:  
\$149 for member all-access association professionals; \$179 for non-member all-access association professionals.  
Visit [holidayshowcase.org](http://holidayshowcase.org) for the full list of registration types and rates.

Association Forum's first-ever virtual Holiday Showcase theme is "connecting the association community." We're bringing everyone together to celebrate our industry in a two-day, action-packed virtual event. It will kick off on Dec. 15 with opening keynoter Raven Solomon at noon, followed by bite-sized education sessions, networking lounges and an exhibit hall. The experience will conclude with a panel discussing the state of the industry and a closing keynote.

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

All events are virtual.



**To this year's  
honorees,  
cheers from  
Bourbon City.**

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# 2020 **af** FORTY UNDER 40 AWARD RECIPIENTS

ASSOCIATION FORUM IS PLEASED TO CONGRATULATE THE ASSOCIATION COMMUNITY'S  
FORTY MOST ACCOMPLISHED PROFESSIONALS UNDER THE AGE OF 40 FOR 2020.

**Colette Apke**, CEM, CMP, DES  
*Assistant Director, Exhibits & Sponsorship*  
American Veterinary Medical Association

**Jane Boateng**  
*Accounting Manager*  
American Association of Endodontists

**Alexandra Bradley**  
*Director of Communications & Engagement*  
American College of Osteopathic  
Family Physicians

**Anikia Brown**  
*Marketing & Communications Manager*  
National League for Nursing

**Kathleen Burbidge**  
*Global Regulatory & Government  
Affairs Manager*  
Water Quality Association

**Laura Caputo**, Esq.  
*Chief of Staff to the CEO*  
Turnaround Management Association

**Mara Daiker**  
MS, CPHIMS, RHIA, SHIMSS  
*Director, Professional Development*  
Healthcare Information and Management  
Systems Society

**Rachel DePauw**, MPH, CAE  
*Senior Director of Programs*  
National Kidney Foundation of Illinois

**Kim Ellison**, MNM, CAE  
*Senior Governance Specialist*  
American Society of Anesthesiologists

**Gina Florzak**  
*Marketing & Communications Manager*  
Selected Independent Funeral Homes

**Jeanette Gass**, MA, MS  
*Manager, Global Programs*  
International Association for  
the Study of Pain

**Frances Hackler**  
*Grants and Development Manager*  
American Association of  
Clinical Endocrinologists

**Lauren Harley**  
*Director of Membership & Marketing*  
The National District Attorneys Association

**Erin Hollinshead**  
*Executive Director, Safe Electricity  
Program/Energy Education Council*  
University of Illinois

**Michelle Katz**  
*Director of Membership &  
Conference Content*  
Association for Jewish Studies

**Jakeeva Lee**, CIPS, AHWD  
*External Affairs Manager*  
Chicago Association of REALTORS

**Rashonda Legault**, MEd, MA  
*Education Project Manager*  
Emergency Nurses Association

**Ande Leslie**, CNP  
*Senior Manager, Marketing & Communications Services*  
SmithBucklin

**Kathy Lovato**, CEM, CMP, DES  
*Senior Manager, Logistics & Exhibits*  
American Dental Association

**Allison Lundberg**  
*Manager, Marketing and Communications*  
Association Management Center

**Colette Marquardt**  
*Executive Director*  
American Camp Association, Illinois

**Paige McLeod**  
*Manger, Volunteer Engagement & Governance*  
Illinois CPA Society

**Kari Messenger**, CMP, DES  
*Senior Meetings Manager*  
Association Management Center

**Tejuana Moore**  
*CME Manager*  
American College of Allergy,  
Asthma & Immunology

**Elizabeth Moris**  
*Director of Brand Engagement*  
Council on Undergraduate Research

**Derek Mulhern**  
*Chief of Staff*  
Association of Fundraising Professionals

**Megan Mullen**  
*Social Media Manager*  
American Academy of  
Orthopaedic Surgeons

**Alicia Navarro**, CMP  
*Meetings Manager*  
American Planning Association

**Ashtin Neuschaefer**, CAE  
*Client Executive*  
Executive Director, Inc.

**Lindsey Powell**, MNM  
*Director of Marketing, Communications and Membership*  
Society of Gynecologic Oncology

**Kent Prickett**, MBA  
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# AD INDEX | COMPREHENSIVE LIST OF ADVERTISERS |

<b>Association Forum</b> .....	associationforum.org .....	9, 12, 26
<b>Association Management Center</b> .....	connect2amc.com .....	31
<b>Atlanta</b> .....	atlantameetings.com ...	<i>inside front cover</i>
<b>Barnes &amp; Thornburg LLP</b> .....	btlaw.com .....	2
<b>BlueSky</b> .....	blueskyelearn.com .....	33
<b>Cook &amp; Kocher Insurance Group</b> .....	cookandkocher.com .....	1
<b>eShow</b> .....	goeshow.com ...	<i>inside back cover</i>
<b>Financial Shares Corporation</b> .....	financialshares.com .....	20-21
<b>Forum 40 Under 40</b> .....	associationforum.org .....	42-43
<b>GLC</b> .....	glcdelivers.com .....	3
<b>Greensboro Area CVB</b> .....	visitgreensboronc.com .....	24
<b>Louisville</b> .....	gotolouisville.com .....	41
<b>Tourism Vancouver</b> .....	tourismvancouver.com .....	27
<b>Vetted Solutions</b> .....	vettedsolutions.com .....	44
<b>Visit Dallas</b> .....	dallasdelivers.com .....	<i>back cover</i>
<b>Visit Phoenix</b> .....	visitphoenix.com .....	25

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As a meeting destination, Atlanta is on a different level. Georgia's capital city is the heartbeat of civil rights history and steeped in artistry and roots. Each of the districts encompasses vibrant neighborhoods filled with cultural experiences, nationally acclaimed food, entertainment for every curiosity, revolutionary developments and Southern hospitality.

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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.

## 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 \$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."

## Tourism Vancouver

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Views like ours don't just open eyes, they expand minds. Few destinations offer a better connection to the world around us. For example, our Convention Centre is situated exactly there — at the center of it all, just steps away from restaurants, attractions and over 13,000 hotel rooms. And not only is it the heart of our city, with views inspiring fresh thought and open minds, but also at the center of global subjects that matter, offering the type of perspective that will help your organization tackle some of the world's greatest challenges. So, between bed, breakfast and business, your delegates can enjoy the fresh air and the fresh perspective.

The urban rainforest isn't the only green thing about this city. Invite your delegates to breathe, eat and travel clean in a place known for environmental commitments. With Mother Nature all around, and a climate that invites us to experience her all year round, we have a special perspective — one that reminds us of the deeper connection we have to the earth and to each other. Maybe that's what makes this place so welcoming and safe. The only way to know is to experience it for yourselves. We can't wait to meet you again!

For more information on how to book your next event, visit [tourismvancouver.com/meetings](http://tourismvancouver.com/meetings).

## Visit Phoenix

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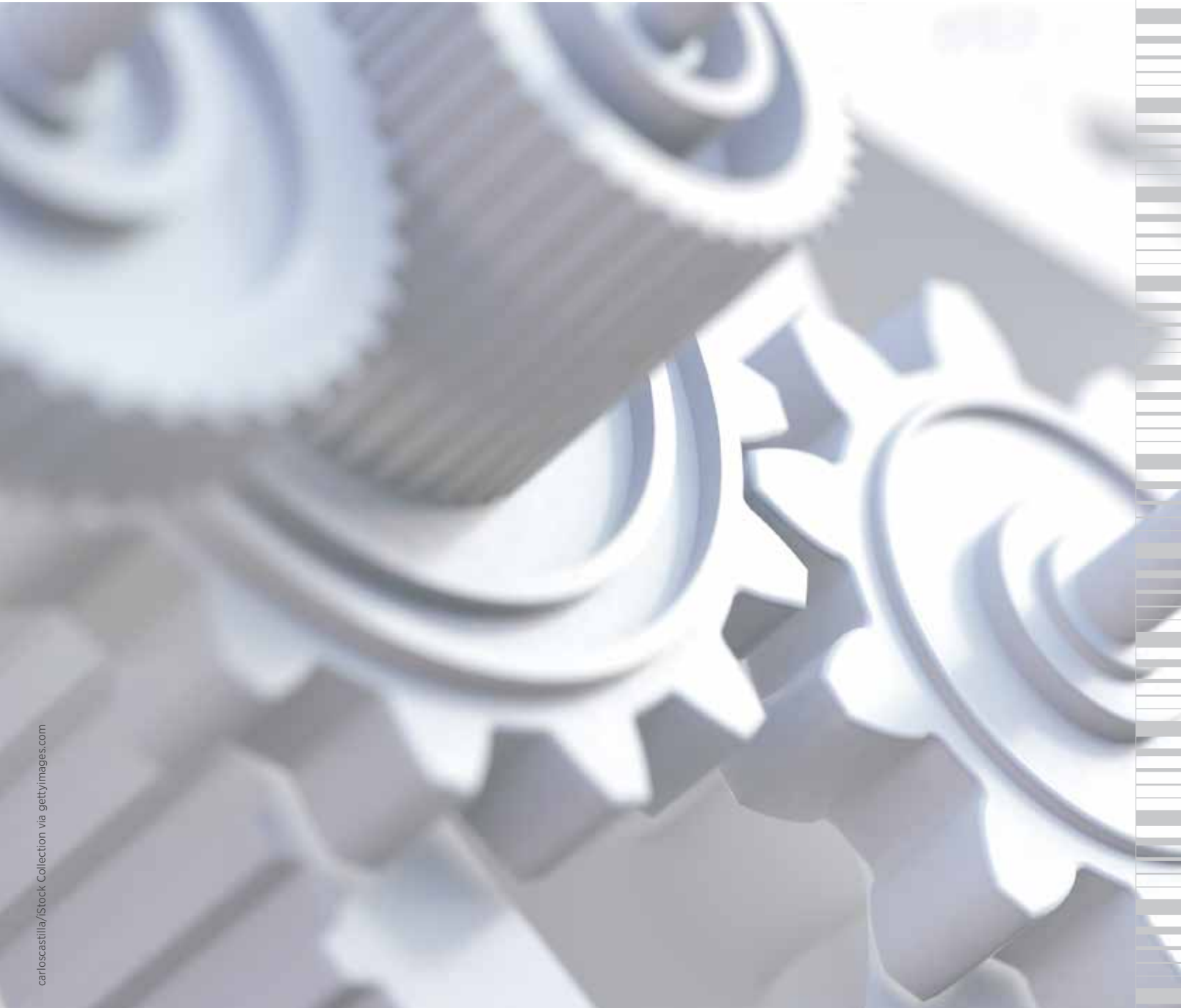
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## How do you unwind after a long day?

Baking has always been my outlet to unwind.

As a food scientist-turned-association professional, there's nothing more relaxing than getting back to my passion of combining science and food, especially to make cheesecake. My only advice is to bake them in personal pans so they cool faster in the freezer!



—Jay Gilbert, PhD, director, scientific programs and career pathways, Institute of Food Technologists

After a long day, I unwind by listening to my favorite music playlist, stepping outside for fresh air and going for a walk. A change in atmosphere and movement helps me decompress, clear my mind and re-energize.



—Dawn Amaskane, CMP, associate vice president, administrative affairs, American Osteopathic Association

Every day is different and brings about different challenges and emotions to face, so there's no one-size-fits-all solution to unwind — you have to find what works best for you and allows you to process the day and everything that happened during it. I like to go for a run, listen to music, cook dinner and eat with my husband as we recap our days — and of course, when needed, the occasional glass of wine, especially during the summer, when I can sit outside and enjoy it in peace on my patio.



—Bridget Terrones, senior manager, integrated marketing, Institute of Real Estate Management (IREM)

It usually takes a lot for me to unwind since my mind gets pretty distracted, and I have a hard time turning off. Typically I'll watch some reality TV like "Real Housewives," "Love & Hip Hop" or a few episodes of whatever I'm binging on Netflix! Watching TV really is my way to relax and unplug. I also like to unwind by chatting with my girlfriends in GroupMe and laughing at the latest meme or Instagram video someone found and cracking a series of never-ending jokes. It's amazing how much we stay connected through a messenger app! Because my mind has been so distracted these days, I've been adding in other rituals to unwind such as taking long, hot bubble baths (I still watch Netflix at the same time!) and meditating outside if the weather isn't bad. The fresh air and sound of downtown Chicago really take my meditation practice to a different level that I'm learning to love.



—Michelle Mills Clement, FASAE, CAE, RCE, chief executive officer, Chicago Association of REALTORS®

Ever since the pandemic started and Choose Chicago offices have been remote, I have spent some portion of my day dedicated to fitness. Working out and breaking a sweat on a daily basis has really allowed me to clear my mind from the anxiety or stress I may be feeling. I am so thankful for my new fitness routine. It has helped me thrive in this new normal.



—Marc Anderson, chief operating officer, Choose Chicago



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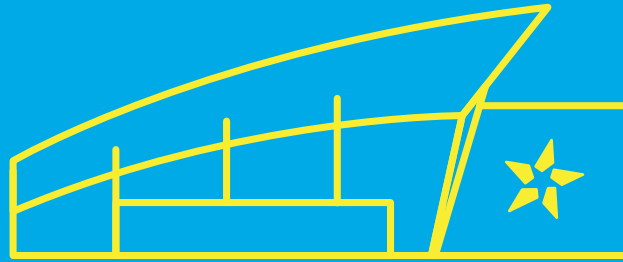
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