

2021 | V105•N1

INFORMING & INSPIRING  
TODAY'S ASSOCIATION  
PROFESSIONALS

# THE WILL TO CHANGE

Leaders will need to be bold to generate non-dues revenue.

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# hi



Our solutions help associations with:

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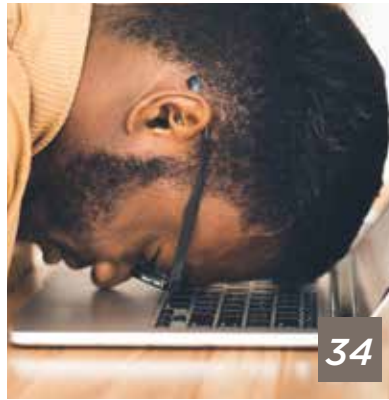




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## FORUM (ISSN 1056-0092) is

published quarterly with issues  
in February, May, August and  
November by Association Forum,  
10 South Riverside Plaza, Suite  
800, Chicago, IL 60606. Periodical  
postage paid at Chicago, Illinois,  
and additional mailing office.  
POSTMASTER: Send address  
changes to FORUM, 10 South  
Riverside Plaza, Suite 800,  
Chicago, IL 60606. Subscription  
rate for members is \$15, which  
is included with dues.

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- Sneeze guards as well as contactless invoice and payment processing
- Designated hand sanitizing stations
- Mandatory usage of PPE in the office and a temperature check before entering our suite

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MICHELLE MASON, FASAE, CAE

PRESIDENT AND CEO  
ASSOCIATION FORUM

## Great Change Means Great Opportunities for Growth

We survived 2020. But not just that: We have all upped our tech games, launched and attended virtual events, searched for solutions to new problems — even met our coworkers' pets through video calls. So much has changed since this time last year, and it's painfully obvious that things will never truly return to what they were.

The pandemic has changed us and our organizations. At the very least, it has brought us perspective. At the very worst, it has brought us grief.

For businesses and organizations worldwide, the pandemic has ushered in uncertainty. The association community has felt this across the various industries we represent. Association Forum has felt it too.

But, there is hope and opportunity in change. Former Chicago Mayor Rahm Emanuel famously said, "You never want a serious crisis to go to waste. And what I mean by that is an opportunity to do things that you think you could not do before."

Now is not the time to play it safe. We must explore new opportunities to grow and change our organizations. If you're an employee, strive to be an "intrapreneur," or someone inside an organization who pushes the status quo and is willing to take calculated risks. If you're a CEO, give your people the space to take risks — your organization depends on it.

Association Forum's Board of Directors recognized that this global shift warranted a new business model for the organization. This model adopts a startup mindset and looks at how we can exploit the organization's strengths while also exploring new opportunities.

Our mission to serve the association community remains unchanged. But, we know that in order to stay relevant during these times, we need to make fundamental changes to run more like a business. Those changes are being made at the highest levels of our organization's strategy and will trickle into everything Association Forum does. We will ask our members what resources you count on from us and dig deeper into those areas. And we will explore new frontiers — new revenue streams, new media, new technology.

All the while, we plan to stay focused on the people who have made our organization strong for more than a century. We're dealing with a new paradigm, but our organization is leading with the same heart.

Thank you for coming on this journey with us. I hope that you'll find some ideas within these pages to spark change for your organization. Together, we can find opportunities within these times. **F**

**“We plan to stay focused on the people who have made our organization strong for more than a century. We're dealing with a new paradigm, but our organization is leading with the same heart.”**

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 **Spanish** by Interpro Translation Solutions, Inc.

### Be a Welcoming Environment

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

### Embrace Innovation and Quality

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

### Have Fun and Stay Positive

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

### Open and Honest Communication and Teamwork

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

### Accountability—Own It

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

### Win with Integrity

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

Como parte de nuestros esfuerzos por brindar un Welcoming Environment® a nuestros miembros, le proporcionamos una copia de nuestros Valores Fundamentales traducidos al español por Interpro Translation Solutions, Inc.

### Ser un entorno acogedor

Ofrecemos un entorno acogedor que busca mejorar a la comunidad en general de forma activa, al reconocer que un todo es más que la suma de sus partes. Haremos que todos los que interactúen con nosotros se sientan bienvenidos, representados, involucrados, inspirados y empoderados.

### Adoptar la innovación y calidad

Nos encanta probar nuevas ideas y buscamos inspiración dentro y fuera de la asociación comunitaria; valoramos las mejoras, tanto grandes como pequeñas. Alentamos y celebramos la experimentación relacionada con los adelantos; sin embargo, sabemos cuándo suspenderla. Nuestro objetivo es mejorar continuamente.

### Diviértase y mantenga una actitud positiva

Está comprobado que generalmente usted pasa más tiempo con sus compañeros de trabajo que con su propia familia. Nos esforzamos por lograr que nuestro entorno de trabajo sea divertido, positivo y en general un excelente lugar para trabajar.

### Comunicación franca y honesta, y trabajo en equipo

¡Uno no sabe lo que no sabe! La comunicación efectiva es clave. Promoveremos un entorno en el que hablemos de manera franca y honesta, con el objetivo de construir un mejor equipo. Incorporamos la franqueza de manera constructiva. Trabajaremos conjuntamente, a fin de generar valor para los miembros.

### Asuma la responsabilidad

Asumimos mutuamente la responsabilidad y esperamos que las personas hagan preguntas y planteen inquietudes de manera respetuosa. Dado que el trabajo requiere de equipos y colaboración interdependientes, confiaremos y dependemos los unos de los otros para ser receptivos y generar valor y servicios de calidad para los grupos de interés.

### Triunfe con integridad

Operamos de manera ética, aportando nuestro tiempo, talentos y conocimientos para avanzar en las comunidades donde trabajamos y vivimos. Nos comprometemos a desarrollar nuestra asociación de maneras que beneficien al entorno y a la sociedad.



# Practice Makes Perfect

**ASSOCIATION FORUM'S PRACTICE STATEMENTS SHARE THOUGHT LEADERSHIP ON A RANGE OF TOPICS, INCLUDING SPONSORSHIP TIPS FOR NON-DUES REVENUE GENERATION.**



## New Professional Practice Statements



Association Forum is pulling together a slew of new practice statements. The statements, created by industry experts, are offered as a management tool for associations and individual association professionals. They're recommended as a means to achieve excellence in managing associations and other nonprofit organizations.

Two statements, "Ethical Behavior of Association Leaders" and "Strategic Planning," will be posted to the website soon. Three additional statements — "Risk Management/Insurance," "Achieving Diversity in Associations" and "Reserves Policy" — will be sent to the board for approval in March.

## The Sponsorship Game Plan

Associations looking for corporate sponsorship should know that the move isn't solely about increasing revenue — sponsorship also has to fit with the association's mission while adding value to members. To back up real quick: Corporate sponsorship is considered as financial or in-kind financial support by a commercial interest that is given to an association or other nonprofit organization. "Sponsorship is distinguishable from a charitable contribution in that a corporate sponsor is typically motivated by a desire to receive a public acknowledgment in exchange for its support of an event or program on a single occasion or over a period of time," according to Association Forum's "Corporate Sponsorship" practice statement.

Who should associations target? In particular, companies might look to market their offerings if they: have new products; are repositioning mature products; are reaching out to new markets; or are undergoing mergers, spinoffs or reorganizations. According to the statement, "The key consideration is not the cost of a program nor the items and activities associated with it, but the value delivered to the organization's members and other constituents, along with the visibility it provides to the sponsor."

Naturally, these sponsorships have to work for both parties. To that end, associations should consider sponsors' goals, which usually arise as new or expanded ways to interact with people who can purchase products or services, according to the practice

statement. "Increasingly, sponsors are looking for focused meeting opportunities with industry leaders through their association partnerships as they develop business plans going forward."

In general, the practice statement highlights the following tips to maximize sponsorship success:

- Deliver what is promised.
- Adjust to the sponsor's needs.
- Seek out small companies that are looking for new opportunities to raise their profile.
- Keep sponsors informed.
- Be selective.
- Manage the relationship.

Lastly, when looking at a sponsorship to boost non-dues revenue, be sure to check for necessary rules and regulations set by your industry — many restrictions can apply. To dive deeper into agreements, legal compliance and more, visit [associationforum.org/practice-statements](http://associationforum.org/practice-statements) and search for the "Corporate Sponsorship" practice statement for the full document.



FOR MORE INFORMATION and access to the practice statements, visit [associationforum.org/practice-statements](http://associationforum.org/practice-statements).

# The Revenue Landscape

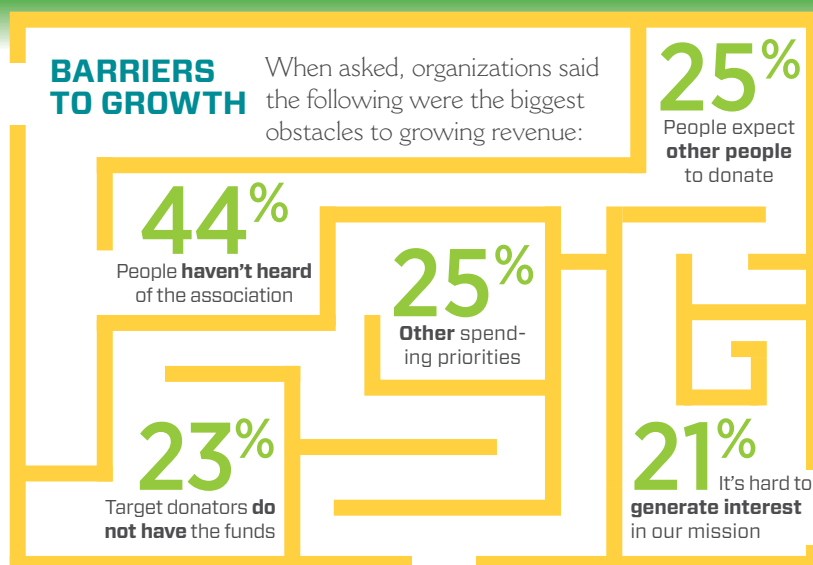
REVENUE GROWTH WAS A MIXED BAG LAST YEAR, EVEN BEFORE THE PANDEMIC HIT. BUT DIVERSIFICATION IS PAYING OFF FOR LEADING ORGANIZATIONS.

## GROWING PAINS



## BARRIERS TO GROWTH

When asked, organizations said the following were the biggest obstacles to growing revenue:



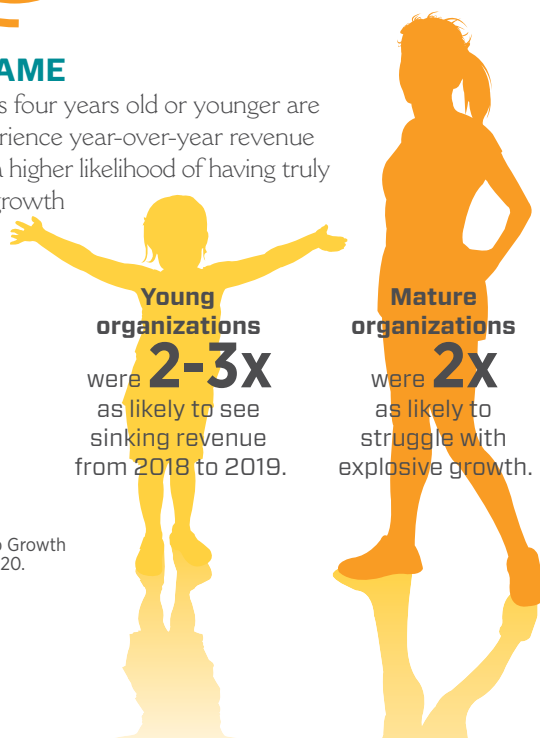
## REVENUE OVERVIEW: 2019 VS. 2018

A look at the year-over-year change in revenue for associations.



## NUMBERS GAME

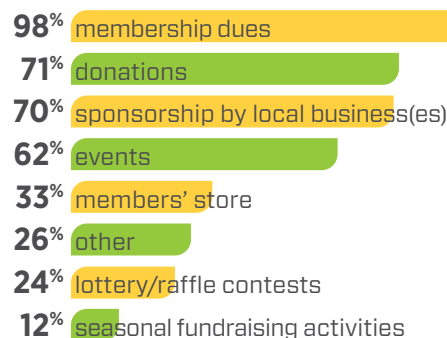
While organizations four years old or younger are more likely to experience year-over-year revenue loss, they also had a higher likelihood of having truly explosive revenue growth when compared to organizations 10 years or older.



## LOOKING AHEAD

There's one common thread among the best organizations generating revenue growth: They had the most diverse revenue streams. However, many associations were quite narrow in the ways they generated revenue.

### How associations generated revenue in 2019



Source: "The Membership Growth Report," Wild Apricot, 2020.



# Are Virtual Trade Shows Subject to Taxes?

BY SUSAN F. CARLSON

**Q: A FELLOW SPECIAL INTEREST GROUP MEMBER RECENTLY SUGGESTED THAT THE INCOME AN ASSOCIATION RECEIVES FROM ITS VIRTUAL TRADE SHOW COULD BE SUBJECT TO TAX. IS THAT TRUE?**

**A:** Organizations exempt from federal income tax are not taxed on their income from activities substantially related to their exempt purposes. However, exempt organizations are subject to tax on “unrelated trade or business income,” i.e., income from a trade or business regularly conducted by an exempt organization that is not substantially related to its exempt purpose.

In defining “unrelated trade or business,” the Internal Revenue Code specifically states that “qualified convention and trade show activity” is not an unrelated trade or business. In other words, the activity is not taxed. To qualify, the organization conducting the convention or trade show activity first must be exempt under Section 501(c)(3), (4), (5) or (6) of the code. Second, one of the organization’s purposes in sponsoring the trade show must be to

educate attendees regarding new developments or to stimulate interest in, and demand for, products or services related to the organization’s exempt activities or industry. Finally, the organization conducting the trade show activity must do so in conjunction with an international, national, state, regional or local convention, annual meeting or show designed to achieve its purpose “through the character of the exhibits and the extent of the industry products displayed.”

The last point — holding the trade show in conjunction with a convention or meeting — is key. It is unlikely that the Internal Revenue Service contemplated the emergence of virtual meetings or the impact of COVID-19 in adopting its rules on the treatment of trade show income, but it did issue a revenue ruling in 2004 to provide guidance on internet-based trade shows. The ruling looked at trade shows operated by two associations, “A” and “B.” Each placed product directories and listings, links to relevant external websites (e.g., of exhibitors and members), online order forms and a means to complete online purchases on its website for a limited time each year. Association A conducted its activities on a supplementary section of the organization’s



website for 16-day periods that coincided with the organization's on-premises semiannual trade show. Association B established a website that was available for a two-week period and then taken down.

The IRS identified one significant difference between the two situations. Association A's website augmented and enhanced its in-person trade show by making the same information available live, both contemporaneously with and for three-day periods before the show opened and after the show closed. The IRS concluded that Association A's website served as an extension of the live trade show, and, therefore, A's internet and live trade shows both met the terms of the exclusion. In contrast, Association B offered exclusively virtual content, independent of "any international, national, state, regional or local convention, annual meeting or show." The IRS determined that Association B's website neither constituted a convention, annual meeting or trade show nor augmented or otherwise acted in conjunction with B's operation of such an event. Thus, B's activities did not fall under the scope of the statutory exclusion that qualified trade show income as tax-free.

While the ruling is instructive with respect to the fact patterns it describes, it doesn't address the number or nature of virtual meetings and virtual trade shows in today's environment. While Association A's virtual show was connected to a "live" in-person show, both examples involved free-standing trade shows. Neither represented the trade show component of an annual scientific or educational conference conducted in-person or virtually. And, of course, the revenue ruling did not take into account the special circumstances raised by the global pandemic that has had dramatic consequences for today's meetings industry.

What does all this mean for associations that would like to hold a virtual annual educational conference and trade show during the pandemic (or after) but want to avoid being taxed on their trade show revenue? The IRS has not specifically addressed those circumstances. Thus, the best

approach for associations planning virtual trade shows in conjunction with annual conferences is to structure the shows to meet the requirements of "qualified convention and trade show activity" as set forth in the code and, at the same time, attempt to incorporate the factors considered determinative in the 2004 ruling.

For example, an association should promote its trade show as part of, and schedule it in conjunction with, the association's educational conference. Although many associations are extending the virtual experience beyond the few days traditionally associated with an in-person annual conference, meeting planners should strongly consider holding the association's trade show over the same, or substantially the same, days as the association's educational sessions. The show may begin a few days before or continue a few days after the educational sessions, but it should be positioned to "augment and enhance"

the conference. In addition, show organizers should display exhibits and industry products at the show in a manner that stimulates interest in, and demand for, industry products and services or educates those in attendance regarding new developments. In other words, the virtual trade show should offer

One of the organization's purposes in sponsoring the trade show must be to educate attendees regarding new developments or to stimulate interest in, and demand for, products or services related to the organization's exempt activities or industry.

interactive networking and educational opportunities available with the latest technology.

It is important to remember that the only issue here is whether the convention and trade show activity will result in taxable revenue for the association. A trade show, virtual or in-person, will not jeopardize the organization's exempt status. And, as an alternative, those organizations not interested in conducting a virtual trade show may generate revenue in conjunction with their annual conferences through other non-taxable revenue streams, such as expanded sponsorship opportunities. As with all matters having tax implications, it would be prudent to consult your legal counsel and tax professionals for guidance on designing a conference that best accomplishes your association's goals. ■



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# FOCUS

In the struggle that was 2020 came inspiration and a desire to branch out in new ways, especially with virtual offerings. Associations continue to hunt for — and capitalize on — new ways to generate non-dues revenue.

“When you start thinking outside the box for non-dues revenue programs, the sky’s the limit.”

The Will to Change, *pg. 12*

“Always remember that a successful grant strategy begins with an effective grants team but hinges on great collaboration between the grants, executive and program teams.”

How to Get Great Grants, *pg. 30*

“One of the biggest barriers to innovation is uncertainty about the future. For my team, we realized the rules have radically changed overnight, and we have to now operate in this new set of norms. The quicker we accepted it, our innovation took off.”

It’s Time to Thrive, *pg. 22*



**A RESOLVE FOR  
THE NEW YEAR**





# THE WILL TO CHANGE

---

Leaders will need to be bold to generate non-dues revenue.

*By Matt Schur*





In the chaotic year that was 2020, associations could be forgiven for not looking too far ahead. After all, the pandemic spurred on new crises and urgent matters seemingly every day. But with a new year, and a full 12-months' worth of experience in responding to the coronavirus' novel challenges, association leaders have an opportunity to look to the future once again.

Among the many issues on the horizon, few are more pressing than non-dues revenue generation. The outlook is thorny to say the least: The lack of in-person events crushed revenues. Plus, many in the business community — and subsequent association sponsors — have been hit hard, in some cases withdrawing sponsorships with associations. That's all in addition to the other challenges that existed before the pandemic struck.

Murky? Maybe. But there's great news, too: There is no shortage of opportunities for association leaders to diversify and boost non-dues revenue streams.

"It's not so much about what to do or how to do it, it's the conviction," says Don Neal, founder and CEO of 360 Live Media. "It's the will."

Some hesitancy and risk aversion is certainly understandable. "For organizations that are really under significant pressure, they don't have reserves, they don't have a financial war chest, they didn't get insurance payments," Neal says. These are the same associations that may have had to furlough employees, reduce salaries or lay off people altogether.

At the same time, Neal says leaders of these associations are also the people most ready to do what's necessary to capitalize on the moment. "There are two catalysts for change: inspiration and desperation," Neal says. "I think those who are most desperate are the ones most willing to put operational apparatuses in place to adopt new processes."

Diversifying revenue streams and exploring new options are key. For a long time, associations have been reliant on the familiar mix of events, publications and membership dues. "Now, with all three under enormous pressure, it's scary," Neal says. "What to do and how to do it — while it's sort of out there for the taking — the ability for leaders to see how it can be customized, tailored and applied in their organization isn't always obvious."

The options include revisiting and enlivening partner relationships, diving into more advanced virtual meetings and taking advantage of the digital landscape. In general, though, it will take leadership from on high to drive long-term solutions.

"I don't know that there are short-term solutions for non-dues revenue," says David Frankil. Frankil was president of the CrossState Credit Union

Association Solutions Corporation before becoming an independent consultant helping associations and vendors maximize non-dues revenue program productivity last year. "There's no magic bullet, there's no, 'oh, my gosh, I just stumbled over a \$100,000 check that I didn't see before.' A long-term mindset is what drives value."

There's optimism lurking in that long-term mindset, Frankil says. "When you start thinking outside the box for non-dues revenue programs, the sky's the limit."

## Better Neighbors

In Frankil's opinion, one of the most fundamental mistakes that associations make is taking vendor relationships for granted. "The worst sort of attitude is: 'You, as a vendor, should feel honored that we're giving you the opportunity to send us this big check. Thanks for that, we'll get back in touch next year when your invoice goes out for next year's fee. Oh, and by the way, don't bug us for anything in the meantime.'"

Associations can act as if it's a hunting license, he says: "When it comes to events, the attitude is that we'd love for you to come and spend a whole bunch of money on our events, but don't talk to anyone else because you're just a vendor."

While Frankil was running the National Association of Federally-Insured Credit Unions Services Corporation (NAFCU Services), he had a vendor partner that was exhibiting at another association's big trade show in Texas. It was a huge production; people would come days in advance — "really a big-ticket item with a lot of wining and dining." The vendor had spent around \$60,000 on the event.

The association's opening reception was in the exhibit hall, with the vendor 30 feet from a giant popcorn station. The vendor could hear people gathering around the popcorn station, could smell the popcorn and could also see a giant sign in front of the stand that said, "no vendors allowed."

What's that popcorn cost? And more importantly, what does that say about your attitude toward the people who are supporting your association, Frankil wonders. "On top of that, nobody from the association or their board ever stopped by to say thank you to the vendor. And so the next year, the vendor didn't pay to be at the tradeshow. When people talk about non-dues revenue, the first and most fundamental thing that has to happen is a mindset shift."

Part of the way forward, Frankil says, is to start treating vendors, sponsors, exhibitors — the whole lot — as valuable partners.

"You want to get to a point where you're looking at a win-win-win solution," Frankil says.



“Where you’re creating programs that are going to generate opportunities for your vendor partners and that are going to help your members become more productive and be more effective at generating revenue themselves. And then, ultimately, you generate more revenue as an association, right? But you don’t get there by clicking your heels three times and saying, ‘Hey, I’d love to have a robust non-dues revenue program. Come on and write me a check.’”

Frankil found success with a model he developed while at the credit union association, which was to essentially apply the basic principles of content marketing to a non-dues revenue program and from there build a robust partner model.

To do so, associations need to create a structured program where an investment will guarantee certain benefits: a set number of live webinars, blog posts, webcasts, speaking slots at events and so on — all opportunities for them to leverage your channel access. “Go to your vendors with a value proposition, not just asking for a check,” Frankil says.

The first step for an association is to take inventory of all its potential channels to understand the opportunities that can be presented to vendors. Then, Frankil typically creates different levels for vendors depending on their investment — usually on a tiered system such as bronze, silver, gold and platinum. “It’s about going to the vendor with this very structured program that’s focused on your channel but is also going to help them be your partner in this channel together. When you do that, it really distinguishes you from almost every other association that they’re working with. Because very few do that.”

Both members and vendors benefit from this attention to detail. By working closely to partner on solutions that work for the vendors, the association has done the due diligence that lets members have confidence that all vendors are quality companies. After all, not every company can be a vendor. That exclusivity assures members that the association’s vendors have the “proverbial *Good Housekeeping Seal of Approval*,” Frankil says.

This approach proved fruitful for Frankil. When he took over as CEO at NAFCU Services and implemented this model, Frankil set new revenue records every year for seven consecutive years. He also increased the number of \$100,000 sponsors from just one when he took over, to seven

before he left. (An eighth \$100,000-level sponsor joined shortly after his departure as well.)

“You want 15- to 20-year partners, right?” Frankil asks. “You want partners that see such value in your channel, because of your commitment to them, that they’re going to write you bigger and bigger checks every single year.”

## The Main Event

Events. There’s no way around it. They have been associations’ bread and butter for years, and they will continue to, pandemic be damned. “It’s your Super Bowl,” Neal says. “You have to devote your time and resources to that because it has a greater chance to produce revenue.”

For at least the immediate future, events will rely heavily on virtual meetings, with Neal not expecting to see big live events until 2022. “Virtual events can’t be a consolation prize. You can’t just hope to get through the next one and wait for the day that you’re back in person. Even when the vaccine gets distributed, there’s going to be a lag time for all the infrastructure to be in place for these in-person events.”

And there is value to be had in virtual events. “We are figuring out how to exploit that value and get the content in front of people who matter to help improve how they perform in their job,” says John Toner V, vice president, convention and industry collaboration, United Fresh Produce Association.

While virtual events typically generate less revenue than in-person events, associations can still provide value to members, which in turn creates revenue opportunities. United Fresh was able to pull off this sort of revenue-generating virtual event on short notice last year.

The association’s in-person event was scheduled for the middle of June. When the NCAA March Madness basketball tournament got canceled, Toner recognized it as a signal of just how severe the pandemic was. With United Fresh’s big event only 90 days away, they had to act fast.

As Toner started looking into digital platforms, he became encouraged. “I got into video game websites because I was doing a lot of research, and there was a streaming video game that had 120,000 people

**“When you start thinking outside the box for non-dues revenue programs, the sky’s the limit.”**

— DAVID FRANKIL, INDEPENDENT CONSULTANT



### 3 TIPS FOR A GREAT WEBSITE

Generating non-dues revenue from a website requires, quite naturally, a good website. Murad Bushnaq, founder and creative director of Morweb.org, which builds websites for nonprofits, says an association should first identify its goals and also identify the different people that come to the website. “What information is most important to them, and how easy is it to find on desktop and also mobile devices?” Bushnaq says.

For instance, if you’re a healthcare association, your audience will have doctors, pediatricians, nurses — each of them are looking for specific information. “You have to make sure that your website addresses those users while also aligning to your organization’s goals,” Bushnaq says. “That strategy is something that the most successful websites have.”

Once that strategy is in place, associations can dive into Bushnaq’s three pillars of a great site.

**1. Emotional:** “Studies have shown that an image-first website — one that uses large images — reduces bounce rates and increases click-through ratio,” Bushnaq says. You also



want your website to have large titles with plenty of space around them to make the site easy to scan and consume, he says. “You want to use colors sparingly — on icons and call-to-action buttons. Color should be sprinkled throughout your layout to entice the user to engage by clicking through to other sections of the website.”

**2. Functional:** It might seem obvious, but the site has to work — and work well. People should be able to easily log in to their accounts, renew their membership, connect with other members, sign up for events, and search for and consume very specific resources. “These areas have to be easily accessible,” Bushnaq says.



**3. Shareable:** “Provide options for people to share resources, blog posts and media,” Bushnaq says. That includes having easy access to your association’s social media feeds, whether it be Twitter, Instagram or Facebook, he says. Make it easy to like, share, ask questions and comment. “In other words, you want to spark a conversation whenever possible.”



watching. I was thinking, all right, it's legitimate. People will show up online to watch 'Saturday Night Live' or with news programs getting millions of viewers a night."

He knew then that his team could make a digital platform work, especially since they had built-in member loyalty and a strong sense of trust among the association's senior leadership. "Our CEO's been here for close to 30 years now, our senior vice president of policy has been here for over 20 years, I've been here for 21 years," Toner says. "So we work really well together. We can look at each other and know everything will be OK, and there's a shared trust there. Working as a team, it's critically important that we all know our function."

Even with the pandemic, and the major economic activity that this event provides to the association and the industry, there was a sense that everything was going to be OK. "Our CEO took the reins on everything because this event is critically important to the success of the industry."

Having that leadership was priceless, Toner says. So was being decisive and acting fast. The association didn't have to get into production until May, but if it was going to make the event successful, it didn't have the luxury to sit around and wait to sort through what was going to happen. "If we had 12 weeks, we really could have figured out the attendee engagement piece," Toner says. But much like the rest of 2020, he and his team made the most of the hand they were dealt.

## The Partner Piece

Of course, being mindful of partners translates to association events — and an event that ultimately generates strong revenue relies on a good two-way relationship with partners.

At the early stage of event planning, associations should interview all the suppliers and vendors first, Neal says. Ask them what they need at the event. What are their problems? How can you help them succeed? "Build the event with them in mind because they are the principal source of revenue," Neal says. "And then try to match up the buyer with the community and audience they want."

The United Fresh Produce Association understood this dynamic for its big virtual event last year. "We had a staff-led effort that put a lot of energy into educating our exhibitors about what was possible on the virtual platform," Toner says. "Most of our exhibitors had elaborate offerings: broadcast chef demos, demo kitchens showcasing how

to use products, videos from helicopters of growing valleys, prerecorded field visits, lettuce harvesting in real time. Some of it was shot with a smartphone, others had real production value."

Overall, the exhibitors were well-versed on the platform's capabilities, including some that really learned how to engage with attendees using digital tools. "It's the first time we had to do that," Toner says of training exhibitors.

For all the challenges that virtual events can bring, there are plenty of positives, too: ease of attendance, lower travel costs and a tremendous amount of data. "One of the most valuable things that exhibitors got out of their United Fresh experience was data," Toner says.

In general, Toner emphasizes the importance of associations paying attention to what matters most for events: value creation, both for partners and members alike. "What does their business do, and how can the event improve their business?" Toner asks. "That's where the value is."

Right now, one of the biggest value drivers is a sense of connection, Toner says. The key to generating revenue from events is delivering that connection. Toner adds: "That's what people are looking for when we get back to in-person meetings, and that's the key to the next generation of digital events: Did you provide connections that helped me do something that I didn't have before?"

## Supercharged Virtual Events

There isn't going to be much room to phone in virtual events going forward, Neal says. While associations had some built-in goodwill in 2020 for live events that weren't necessarily of the highest caliber, that's not bound to last. "Everybody got a break last year," Neal says. "Audiences were very forgiving. Now as we go into the new year, the events have to be better."

With Zoom fatigue — and general virtual fatigue — at all-time highs, how do you get people to pay for a virtual event after a year of all digital all the

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**“That’s what people are looking for when we get back to in-person meetings, and that’s the key to the next generation of digital events: Did you provide connections that helped me do something that I didn’t have before?”**

— JOHN TONER, UNITED FRESH PRODUCE ASSOCIATION



time? What about after two years of this? “How do you get people to come to an event, be engaged, be willing to spend time in a marketplace?” Neal asks.

The key, Neal says, is to start thinking with a reality-TV mindset. “Two or three hours a day is about all anybody wants to watch,” Neal says. “It’s got to be broken up in a lot of increments. It has to be hands-on interactive — and not just chat and polling, which everybody’s doing. It’s got to be more than that.”

Event organizers, working with their partners and technology platforms, will need to embrace the use of studios to film higher-quality supplier demonstrations, talk-show-like stage sets and include more production value to all aspects of the virtual event, Neal says. Also on the rise, Neal says, is making sample boxes available for suppliers to provide tangible examples of what is being demoed, allowing virtual event audiences to experience firsthand what a product looks, smells and tastes like. Neal says: “Real-time audience polling, immediate responses to chat and customized matchmaking of attendees is becoming table stakes for high-quality virtual events.”

## The Digital Piece

One of the keys to capitalizing on live events starts with having a good website. It may be digital basics 101, but associations need to showcase value to members more than ever. For live events, that includes promotion on the website through common measures: having a big banner image, large RSVP buttons, a landing page with event information and so forth.

While simple in theory, it’s a critical step to get exactly right. After all, once you set up a great user experience for your live events, you can duplicate that over and over for events large and small, says Murad Bushnaq, founder and creative director of Morweb.org, which builds websites for nonprofits.

Having a clear-cut process can lead to more event sign-ups. “You need to have a good site because people have a lot of options out there,” Bushnaq says. “If users aren’t getting what they need, they’re going to

lose interest and not engage with the association. If they can’t get value out of it, there’s a million other things to do.”

While easier event registration can lead to a higher attendance and thus greater revenue, associations can also drive revenue with a site in a multitude of other ways. Online stores are a great place to sell branded merchandise, ask for donations, link to event registration and more. Hosting a job board, which is a great member benefit, is another opportunity to partner with employers, this time with the organization paying to post job openings.

On the content marketing side of your website in particular, Bushnaq sees expanded educational video offerings as a great way to boost revenue. “It’s not as common as it should be, and it’s something associations should definitely be using,” he says. The revenue can come from a partner-sponsored video or from one-off fees to access the video. Bushnaq adds that creating some sort of certification or badge after the video course is over is a great way to further boost engagement and deliver value.

## The Way Forward

There’s no way around it: 2020 was hard for just about everybody. Revenue and growth were stagnant for associations and businesses alike. As Toner notes, there has been no shortage of pain or loss recently. But for all the turmoil, there is hope — rooted in the very foundation of associations.

“Associations have been around for centuries,” Toner says. “I belong to associations that my grandparents were members of; I go to meetings, and I see my grandfather’s picture on the wall.”

Which is to say, associations aren’t going away. They may be changing in new ways, and revenue may have to come from previously untapped streams, but people will always want to belong to something greater than themselves. “Members care about the organizations they belong to,” Toner says. “It’s our job as a trade association to help connect all those members, and help members do better with each other.” **E**

MATT SCHUR IS A CHICAGO-BASED WRITER AND EDITOR.

**For more ideas** and strategies on generating non-dues revenue, dive into past *FORUM* stories at [forummagazine.org/tag/non-dues-revenue](https://forummagazine.org/tag/non-dues-revenue).





# TIPS FOR LEADERS TO STAY ON TOP

Association Forum's general counsel Jed R. Mandel, founding member of Chicago Law Partners, LLC, shares how to become – and stay – a successful CEO in his FORUM web exclusive article, **AVOIDING MISTAKES: TIPS FOR CEOS TO STAY ON TOP.**

## GETTING TO BE A CEO

- Don't accept a job offer without due diligence. Know what you are getting into.
- If there are things that you need and want, get them before you accept the job (and get them in writing).

## STAYING A CEO

- CEOs must follow the organization's bylaws, policies and procedures. There is no easier way to lose one's job than by not following the rules.
- If you make a mistake, disclose it, own up to it and address it.

## AVOIDING CRITICISM AS A CEO

- Don't allow the board to get involved in issues for which they shouldn't interfere (like hiring, firing, discipline, etc.).
- Don't take action without authorization.
- Don't let your leadership be surprised — disclose, disclose, disclose.

## SUCCEEDING AS A CEO

- CEOs must pay attention to what's going on: in the industry or profession they represent, among the membership, within the organization, among the staff, etc. CEOs can't "manage" what they don't know.
- CEOs should delegate and avoid micromanaging but never fail to supervise. The buck stops with the CEO.

## BEING COMPENSATED AS A CEO

- Make sure the board knows that association management is a profession and an expertise. All of the skills, experience, knowledge, demands, stress and the like required to be a CEO more than justifies the CEO's expected level of compensation.
- Establish and periodically review and revise career goals. Knowing where you are, in life and in your career, will help you focus on what you need.

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# IT'S TIME TO THRIV

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Forget simply surviving the pandemic. See how one organization got stronger by growing its relationships with members and sponsors.

*By Candice Warltier*

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**C**orporate and association leaders will never forget when a global pandemic shut down businesses with great uncertainty about reopening. Many associations brought together leadership teams to contact host sites and vendors and renegotiate contracts, frequently canceling live events entirely. Others quickly adopted new technology to host virtual events or work with sponsors to identify creative solutions to reach and communicate with members.

Chicago Innovation was no stranger to 2020's challenges: The association hosts — and relies on — events year-round for people to share ideas, find opportunities and build relationships with innovators in and around Chicago. And, to be sure, most associations in general rely on these sorts of meetings to generate revenue. The top two revenue streams for associations are membership dues (44%) and events (33%), according to a survey conducted by market research firm Researchscape and CS-Effect. Nearly three out of four associations named exhibiting at a conference as the primary sponsor benefit.

Given the pandemic's effect on the organization's business model, Chicago Innovation had no choice but to, well, innovate. Their business transitioned from solely hosting live events to producing virtual events while increasing event registrants, strengthening relationships with sponsors and even gaining new sponsors.







Chicago Innovation relies heavily on its annual fundraiser — the In-Gala — an in-person event that typically raises \$250,000. When the pandemic hit, the Chicago Innovation board decided the fundraiser would have to be virtual.

“We hosted the In-Gala because we are all in this together,” says Luke Tanen, executive director, Chicago Innovation. “It was one of the most significant things we did this year — the best event we’ve ever done.”

Chicago Innovation turned to Frost, an event production company and longtime partner, to produce a creative, dynamic event that engaged the audience and raised money. During this time, Frost had made its own pivot from doing all in-person events to producing interactive virtual events for clients, including a drive-in theater at Soldier Field and a gala for Steppenwolf.

The event production company built a 3,000-square-foot television studio to produce segments of the event, which took the pressure off people. “We continued to do a few live

events, including live giveaways,” says Taylor Podgorny, an account executive for Frost.

For those segments produced in the studio, Frost sticks to strict COVID-19 guidelines including social distancing, wearing masks and taking temperatures of the people who are being videotaped.

Chicago Innovation ensured the event was highly interactive by giving out prizes to winners of a trivia contest. They also hosted a live auction and had a handful of celebrities make appearances, including actor Jeremy Piven, former professional baseball and football player Bo Jackson, and rapper Lupe Fiasco.

Chicago Innovation brought the physical world into the virtual experience by sending VIPs boxes containing wine, truffles, a Chicago Innovation face mask, Chicago Innovation's latest book *Rising Together* and other goodies.

With a reduction in event-related costs, “we ended up netting more in a global pandemic than in person,” Tanen says. “We jazzed up our supporter base and set a new standard for ourselves.”

## How It Unfolded

Early last year, Illinois Gov. J.B. Pritzker made the announcement that all schools and large events were banned due to COVID-19. The Sport of Innovation, one of Chicago Innovation's largest events with 600 attendees, was supposed to kick off just three days later.

"We canceled the event, and everyone was understanding, including the site vendor and caterer who gave us a full refund," says Luke Tanen, executive director, Chicago Innovation. "In early April, we didn't know when things would return to normal, so we planned to reschedule and thought that by June we would be doing in-person events again."

In mid-April, the team realized COVID-19's impact would be more serious, with live events canceled indefinitely. Chicago Innovation leaders came together to quickly plan and schedule virtual events, identifying timely topics that would resonate with its audience and help them through this difficult time.

Chicago Innovation had also originally planned to host the Chicago Student Invention Convention (CSIC) in April with more than 1,000 students and educators. Chicago Innovation leaders pivoted to an all-virtual event and secured more than 100 people as judges. Encyclopedia Britannica, a sponsor of the in-person event, had a program called LumieLabs that allowed for the substitution of traditional trifold display boards that students used to share their inventions. When the entire CSIC program transitioned to a virtual event, videos became an essential component for students to communicate their inventions with judges.

"The CSIC team has been a great partner, and we felt a kinetic synergy between our teams right

from the start," says Sal DeSpirito, senior vice president of marketing and business development, Britannica Group. "It was an absolute pleasure to partner together and help shape this competition to accommodate the current environment."

The partnership proved more than successful. Ultimately, Chicago Innovation had over 1,600 people watch the virtual CSIC — 600 more people than the traditional in-person event, Tanen says.

## A New Value Proposition

Before the pandemic, Chicago Innovation had never hosted a virtual event.

For the first virtual event, the Chicago Innovation team chose a timely topic: Innovation Is Survival. The event focused on how organizations need to embrace innovation more than ever — not just to compete, but to stay in business. Approximately 350 people registered, which was slightly more than projected for an in-person event.

Other topics included how to lead during a crisis as well as helping companies navigate the Paycheck Protection Program, which featured Ed Wehmer, founder of Wintrust Bank.

"We chose topics for the virtual events that people needed to hear about right now," Tanen says. "We are all writing this playbook together and learning together."

Another key virtual event element was ensuring a high degree of audience engagement and interactivity. Chicago Innovation created events where the audience could ask questions and interact, including incorporating polling so the panelists could react to the sentiments of the audience. All events were put together within three weeks and hosted via Zoom.





By hosting these virtual events, the association was able to offer two events per month rather than the typical one event a month. Tanen says that prior to the pandemic, Chicago Innovation would have never operated at this speed given that in-person events take a lot more time to secure a host site, caterer, vendors and speakers.

## The Sponsor Pitch

Chicago Innovation's success is highly dependent upon its relationship with sponsors, so leaders were quick to communicate to all sponsors and reassure them that Chicago Innovation was continuing forward, just changing the method. There were three keys to success in maintaining and increasing sponsorships during this time, Tanen says.

First, the organization's mission and programs remained the same. Second, Chicago Innovation leaders reassured sponsors that events would continue to attract large crowds and that sponsors would have the opportunity to showcase services and products to the Chicago Innovation community. Virtual events also provided a platform to reach an even larger audience.

"We can reach more people because it's easier to get people who are in the suburbs and in other cities to tune in," Tanen says. "When we return to normal, we will offer both in-person and virtual events."

Lastly, and the biggest challenge, was creating an environment for networking, which is a top priority to Chicago Innovation members. "It's not the same as an in-person cocktail reception, but we now host networking sessions via virtual break rooms, and we share the guest list and LinkedIn profiles before and after the events," Tanen says. "It's worked. We've had nine sponsorship conversations and all have returned. The value proposition is still high, and they know we will do everything we can to meet their needs."

Another key takeaway is that the success of a sponsored partnership is highly dependent upon the relationship. "A lot comes down to the relationship we had going into this," Tanen says. "We have always focused on relationship building with sponsors and partners. Not just meeting them once a year, but always checking in with them and seeing what we can do to help. This enabled us to become partners with them. That foundation was already there."

Wintrust Bank has been a sponsor of Chicago Innovation since 2013 and is part of a larger element of branding that focuses on small business and economic development. Wintrust saw the impact of the virtual events and approached Chicago Innovation to be its technology partner. Despite the

**“If there is a lesson to be learned, it is to understand that sponsors have new needs that are totally different than in the past, and you may be able to add value in new ways that you didn't before.”**

— LUKE TANEN, EXECUTIVE DIRECTOR, CHICAGO INNOVATION

pandemic, the financial institution decided to increase its investment with Chicago Innovation by 25%.

"We support organizations that help people start new business, especially during challenging times," says Matthew Doubleday, chief marketing officer, Wintrust. "Chicago Innovation was one of the first to pivot to virtual events and do it well, keeping the audience engaged."


"It is a clever example of how a typical relationship with a sponsor can be transformed," Tanen says. "If there is a lesson to be learned, it is to understand that sponsors have new needs that are totally different than in the past, and you may be able to add value in new ways that you didn't before."

In addition to strengthening relationships with existing sponsors, Chicago Innovation secured new sponsors during the pandemic, including Walgreens — now one of the organization's largest sponsors — and Molex, a manufacturer of electronic, electrical and fiber optic connectivity systems.

## The 2021 Push

As association executives look to the future, 49% indicate they feel neutral, according to the Researchscape and CS-Effect survey.

"One of the biggest barriers to innovation is uncertainty about the future," Tanen says. "For my team, we realized the rules have radically changed overnight, and we have to now operate in this new set of norms. The quicker we accepted it, our innovation took off."

With the future unknown, it's best to begin strategizing with your sponsors and plan for both in-person and virtual events. "This year, whether virtual or in person, we will be ready for all of it," Tanen says. 

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# HOW TO GET GREAT GRANTS

While more associations are looking to grant funding to diversify their revenue streams, many are still trying to understand how to convert ideas to income. An industry expert weighs in on five common questions.

*By Emi Aprekuma*

**Y**ou've been asked to secure grant funding for your association. Great! But where do you begin? What are best practices? How do you ensure your organization is prepared to submit a grant? What happens after you get a grant? These are common questions for many people trying to find and win grant funding for their projects. Before we dive into these questions, let's start with some basics.

## Strategy Is Everything

Creating a strategy for how you will navigate each stage of the grant cycle can dramatically reduce the stress of this process. As you develop your grant plan, make sure all members of your grants,

executive and program team understand the plan and know their roles and deadlines. Always remember that a successful grant strategy begins with an effective grants team but hinges on great collaboration between the grants, executive and program teams.

Grant cycles go through four main stages. The first is a research stage where you gather info on potential grant opportunities. Once you identify grant opportunities, you enter into the second stage of the grant cycle — writing the proposal. Once you've written and submitted that proposal, if you are successful, you will enter into the third stage: carrying out the grant-funded project. Finally, in the fourth stage, you will have to steward that grant gift or report on the progress made. Below are five frequently asked questions about each of these stages of the grant cycle.



### Are you eligible?

Grants commonly come from three main sources: private foundations, corporate foundations (or a corporation's social responsibility department) and government agencies. Each of these funders usually lists eligibility requirements on the request for proposal or webpage where the grant notice is posted. There are a few common eligibility requirements. One common requirement of all three types of funders is that they usually only fund organizations with a 501(c)(3) status. (Note: Many will fund organizations that are not 501(c)(3) nonprofits if they partner with a 501(c)(3) nonprofit organization.) Many funders also have geographic restrictions and require grantees to either be located in a certain region, serve the region or both. Sometimes funders have requirements about operating budgets.

These funders may require that operating budgets may not exceed or be less than a certain amount. Other times, funders have requirements about governance structure. For instance, funders may require that the leadership or board of an organization reflects the demographics of the community the organization serves. Some funders may not provide grants to organizations with interim leaders. Finally, funding organizations often define the types of organizations that are eligible for funding. For instance, some grants may exclude academic organizations or only be given to hospital systems.

Preparing grant proposals often requires a significant amount of organizational resources, so it's important to review funder eligibility requirements and ensure you're eligible before you invest in creating and submitting a proposal.



## Where do you find them?

A great grant research strategy is a crucial part of a thriving grant development department. The internet provides a wide range of convenient avenues to search for grant opportunities. One of the best ways to find grant opportunities is to first list your competitors. Then, review these organizations' web pages and annual reports to see which grant funders are supporting them. Research these funding organizations and see if they are offering opportunities that align with your association's mission, strategic plan or upcoming projects.

You can also use search engines to find grants. Both general search engines and grant search engines can be useful. When searching for funding using a general search engine, a good strategy is to start with the broadest concepts and then hone in. For instance, if you are looking for funding for a diversity, equity and inclusion fellowship training program in healthcare, you could start with a search for "healthcare grants." Then, try "healthcare education grants" next, and then further refine it to something like "diversity and inclusion healthcare education grants."

Finally, your association's network could be helpful in finding grant opportunities. Often, leaders of associations serve on boards of grant-making foundations or have friends who do. It is important to routinely poll your leadership and find out what contacts they have in the grant-funding sphere. These queries can also extend to contacting members. For instance, if you have an especially active volunteer committee, reach out to those members to see if they know any grant funders.

## How do you write a grant proposal?

Funders usually either have a proposal template with a list of questions or simply ask you to provide information about your project. In addition, funders sometimes have page, word or character limits

and may explain the font and size in which they want the proposal text to appear. It is important to follow all instructions provided.

When responding to a funder with a proposal template, try to answer each question as accurately and completely as possible, emphasizing aspects that are important to the funder. If templates are part of an online submission portal, it's helpful to copy and paste the template into a Word document and complete the proposal in the document first. This makes it easy



## What do you do when you get a grant?

Once a funder communicates that they would like to fund your grant proposal, they often send a grant agreement, or letter of agreement, for your signature. This grant agreement usually includes all the terms of the grant, including due dates of any reports. One of the most important terms of a grant agreement is the requirement that you stick to the project description, budget and metrics included in your grant proposal.

Therefore, the first step in successful grant project management is to create a schedule of events. Drawing from the proposal and the grant agreement, create a schedule of when all project deliverables or reports are due. In this schedule, include deadlines for checking in to make sure these deliverables are being met. Be sure to note the dates you will need to begin writing reports, so they can be submitted before the due dates. As the grant year proceeds, continue to review the schedule and check-in points to make sure you are on track to complete all project deliverables and submit timely reports.





for you to edit the document before copying and pasting your answers into the grant portal.

When you encounter a funder that does not have a proposal template, consider using the instructions given to create a proposal template. For instance, a funder's instruction might state something like the following: Please send a proposal that includes a description of your organization, a description of the project (listing staff members who will complete the project and a timeline) and measurable program objectives.

Consider creating a corresponding proposal outline similar to this:

- I. Organization description
- II. Project description
  - a. Project summary
  - b. Staff members
  - c. Project timeline
- III. Measurable program objectives

If you can, try to include an introduction or conclusion section that states the amount of money you are asking for, even if you will be submitting a budget.

Creating a strategy for how you will navigate each stage of the grant cycle can dramatically reduce the stress of this process.

EMI APREKUMA IS A SENIOR GRANTS MANAGER WITH ASSOCIATION MANAGEMENT CENTER, AN ASSOCIATION MANAGEMENT COMPANY BASED IN CHICAGO. SHE CAN BE REACHED AT [EAPREKUMA@CONNECT2AMC.COM](mailto:EAPREKUMA@CONNECT2AMC.COM).

## 5 What if you have to make changes to your project after you get the grant?

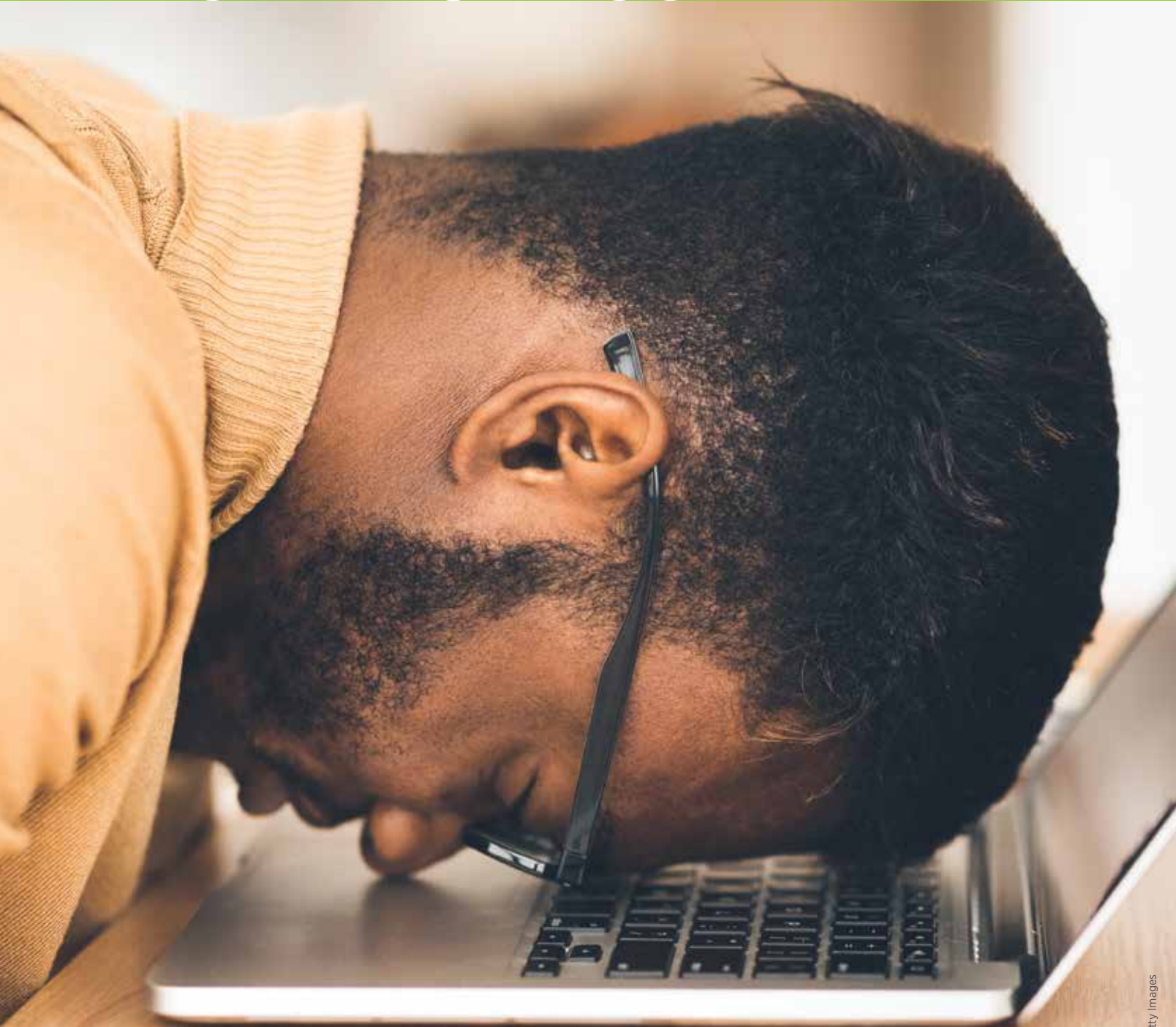
Grants usually have legal implications. The grant agreement you sign (or in the absence of a grant agreement, the proposal you submitted) defines the terms of this legal agreement. Therefore, it is important to make sure your team is equipped to carry out every part of the project you include in the proposal.

At times, though, changes in circumstances can make it difficult or impossible to meet project deliverables. You must report to the funder regarding any issues that will cause you to substantially change the way you are going to do the work, your ability to do the work, your ability to meet the deadlines set for the work or how the money will be spent.

Once you identify a problem, take the time to figure out if there is a solution. Communicate with the funder as soon as you know there is a problem and you have had time to figure

out what the solution is, if there is one. Consider sending an email to the funder asking for time to meet to discuss the project. During the meeting, be honest, take responsibility — if you made a mistake — and present a clear resolution.

For example, if you were planning a grant-funded live conference and had to reconsider the event because of the COVID-19 pandemic, the first step would be to assess the situation. Figure out what impact the pandemic would have on the event. For instance, do you have to cancel the event, postpone it or reformat it? Once you know what the plan will be, reach out to the funder. State that the pandemic has caused you to rethink the program and explain what adjustments will be made. As you describe these changes, be sure to emphasize the parts of the program the funder was most interested in. For example, let's say you have to change from a live event to a virtual event and your funder is most interested in educating a large group of professionals. As you talk about the change, it would be good to note to the funder that you expect more participants because of this transition to a virtual format. Remind the funder that you value your relationship with them and need their funding to complete the project. **E**



## 6 Pitfalls of Virtual Meetings

VIRTUAL MEETINGS ARE HERE TO STAY — HERE'S HOW TO SIDESTEP THE MAJOR MISTAKES.

BY HANNA ARONOVICH, CAE





When COVID-19 hit, many associations quickly pivoted from in-person meetings and events to a virtual format — and some had great success.

However, virtual meetings come with their own challenges. Being mindful of the potential pitfalls — and successfully navigating around them — is essential for associations to conduct great meetings in the future.

### The Virtual Value

Yes, it's great that virtual meetings allow associations to continue to conduct meetings in a COVID-19 world. But virtual meetings offer numerous benefits beyond a pandemic, including reduced expenses and greater flexibility.

And, overall, attendees have been satisfied with virtual meetings. A June 2020 survey from International Data Corporation found that about half of attendees at virtual events felt the experience met their expectations, while nearly a third reported a better experience than expected. Similarly, a September 2020 survey from Northstar Meetings Group showed that attendees ranked their experience at a virtual meeting a 6.7 out of 10.

From the exhibitor point of view, there were more concerns about the value of a virtual meeting and the ability to successfully capture leads and demonstrate products in an online environment, according to a Tradeshow Logic report. As a result, expected exhibitor attendance at virtual meetings was underwhelming — with nearly 60% of respondents reporting they were planning to participate in only two or fewer virtual conferences or tradeshows in the next 12 months.

Sponsors, on the other hand, are interested in virtual events but may need some convincing. A May 2020 survey from AIM Group International showed that 78% of sponsors would be interested

in sponsoring fully virtual events, although 56% would like to invest less, 34% would invest the same amount, and 10% would be willing to invest more if greater visibility were guaranteed.

Given that virtual meetings are likely to be a staple of associations' offerings for at least several more months, it's essential to have the right tools and approaches to satisfy attendees, exhibitors and sponsors.

### Overcoming Stumbling Blocks

Victor Bohnert, CEO of Innovatis Group, an association management company, says virtual meetings can be a boon for associations — if they take the right approach.

Bohnert says Innovatis Group encouraged their association clients to become early adopters and transition to virtual events in February 2020, at the beginning of the pandemic. "We counseled our clients to move to virtual events before most of the stay-at-home orders were announced," he says. "That worked to our advantage because being among the first opened new doors for our association clients, and we saw the opportunities grow."

Organizations missed out if they took a wait-and-see approach or stalled because they didn't have the perfect virtual event strategy, Bohnert says. "Offering a definitive solution is always better than holding back."

Virtual events, however, require a different strategy and approach than in-person events, he says. "Associations need to think of virtual events as their own type of experience."

Bohnert stresses that associations that simply try to transition an in-person meeting or event to a virtual platform, and fail to look at the entire experience, are likely to encounter some missteps. But that doesn't have to be the case. "Virtual events can be enormously successful when the proper planning and strategies are implemented," Bohnert says.

Below are six common problems with virtual events — and the solutions to fix them.

## PROBLEM 1

### TECHNICAL TROUBLES

Everyone who has attended a virtual meeting or event has likely encountered some technical difficulties, whether it be a poor internet connection, sound issues or difficulty navigating the platform.

### SOLUTION: MAKE HELP EASY TO FIND

Technical difficulties are to be expected during an online event. But the key is to make help easily accessible. “For every event we plan for our association clients, we make sure to offer a very easy-to-find help desk,” Bohnert explains. “We have a live team that is ready to assist with any questions.”

Innovatis Group also ensures there is a backup plan if something should happen during the event. “We have rollover strategies in place, so that if one of the technologies did go down, we could roll into a new environment and protect the event and the experience,” Bohnert says.

## PROBLEM 2

### POOR USER EXPERIENCE

Virtual meeting platforms that are difficult to navigate or require special downloads or applications are destined to frustrate attendees and other participants.

### SOLUTION: FIND THE RIGHT PLATFORM

Select a platform that excels at providing a great user experience. Bohnert notes there are many virtual meeting platforms on the market, which can make it more challenging to select the right one. But meeting planners need to be discerning. The platform should provide a good user experience for all — from the attendees to the speakers to the exhibitors. He also cautions against implementing gimmicks or trends just for the sake of it, especially if it creates a challenging user experience.

“The platform needs to cover the basics — for example, registration, logging into the online environment — easily and intuitively,” Bohnert says. “It should also not require downloading software or apps. There’s nothing more frustrating than joining a virtual meeting and realizing you need to download an updated version. It has to be web-based.”



## PROBLEM 3

### IMPERSONAL EXPERIENCES

One main reason association professionals attend events is for the in-person experience and networking opportunities. Virtual meetings run the risk of missing out on that human connection and not satisfying attendees’ desire to connect.

### SOLUTION: USE DATA TO GET PERSONAL

Gather information about your attendees so that you can provide them with the experience they want. “As part of the planning process, associations need to consider what type of experience attendees want — from the moment they join the event until the time they leave,” Bohnert says.

Innovatis Group employs a matchmaking strategy to deliver a more personal touch and a richer experience. “We want to take the randomness out of meetings and events,” Bohnert says. “We felt it was important to create the environment to foster deliberate interactions between attendees and exhibitors.”

There are several matchmaking tools available. Associations can explore this technology for their virtual meetings to deliver a more personalized experience and greater value.

## PROBLEM 4

### ENVIRONMENTAL DISTRACTIONS

At an in-person meeting, attendees are a captive audience. They have spent time and money to travel to the event and have set aside several days for the experience. With a virtual meeting, attendees are typically working from their home or office and may be multitasking throughout the event. This can reduce attendance and participation.

### SOLUTION: PUT ENGAGEMENT FIRST

Attendee engagement should be at the center of a virtual event strategy, Bohnert says. “Our clients have seen increases in attendance, satisfaction and revenue for virtual events,” he says. “And that’s because we’re not just looking at the size of our audience — we’re looking at engagement levels. Associations need to ask how members are engaging with the association and how attendees are engaging during the event.”

One way to increase attendee engagement is to ensure that the virtual environment is as compelling as the in-person environment. For one association, Innovatis Group created a virtual replica of the hotel where the in-person meeting was supposed to be held. “The in-person meeting was scheduled to be at a very distinctive property,” Bohnert explains. “When we transitioned that meeting to a virtual event, recreating the property in the virtual environment went a long way to creating a connection with attendees and providing a distinctive experience.”



Paying attention to these types of details is critical, Bohnert says. “When someone has a lackluster in-person experience at an event, it’s harder for them to leave,” he notes. “But when the virtual experience is negative, it’s really easy to leave.”

Attendees who don’t have a good first experience with the virtual event are more likely to drop out. Focus on making a good first impression with attendees — and then be sure to continue to deliver on that great experience throughout the meeting.



78%

OF SPONSORS would be interested in sponsoring fully virtual events.

#### PROBLEM 5

##### UNIMPRESSED EXHIBITORS

With associations focusing heavily on the attendee experience, exhibitors might feel overlooked or be unimpressed with their experience in the virtual exhibit hall.

##### SOLUTION: CREATE EXHIBITOR TOOLS AND GUIDES

In addition to communicating with attendees about what to expect during the virtual event, associations should take equal care with their exhibitor communications. Innovatis Group develops documents covering best practices for exhibitors and other partners, so they are prepared with what they need to make their virtual booth a success. “We make sure our exhibitor partners are set up and comfortable well before attendees begin to visit the exhibit hall,” Bohnert says.

“We also work with our exhibitor partners to ensure they have built out their booth space and posted compelling content, which is critical for driving booth traffic and meaningful interactions,” he says. “One of the associations we worked with had hundreds of attendees at their virtual event, which resulted in several thousand document downloads. This would not have happened if we did not have conversations with our exhibitors upfront.”

#### PROBLEM 6

##### SKEPTICAL SPONSORS

Many associations have fine-tuned their sponsorship packages for in-person events. But with virtual events, many physical touchpoints are no longer an option.

##### SOLUTION: REDEFINE SPONSORSHIP PACKAGES

“Sponsorship packages need to change and how associations speak with partners about sponsorship opportunities needs to change,” Bohnert says. “There aren’t lanyards or on-site giveaways anymore — but on the flip side, virtual events can create a more meaningful environment.”


For example, with in-person events, attendee tracking can be more challenging. In a virtual environment, associations can provide sponsors with more insight into attendee behavior and interests.

“The virtual meeting makes the interaction between the attendee and the sponsor active, not passive,” Bohnert explains. “Sponsors are not just handing out giveaways and hoping it works. Clicks and connections can be tracked and turned into insights, creating more value for partners.”

Associations should reevaluate the offers they are presenting to sponsors and look for opportunities to deliver attendee insights and value — and adjust sponsorship packages to align with these new realities.

##### Planning for 2021 and Beyond

Looking to the future, Bohnert says associations should plan for virtual events to remain a staple of their meeting strategy. “Anyone who is not planning for virtual events in the future is making a mistake,” he stresses. “Starting in the second half of 2021, we think smaller, regional events may resume meeting in-person, but the larger events will take longer to come back.”

Even once in-person meetings can fully resume without worry, virtual events aren’t likely to disappear. “Many attendees have gotten used to the convenience and benefits of virtual meetings,” Bohnert says. “Associations should plan to continue to offer virtual meetings — not to replace the in-person meeting, but to extend or augment the meeting for those who can’t attend in person.” 

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

 VISIT [forummagazine.org/a-quick-prep-school-for-digital-speakers](https://forummagazine.org/a-quick-prep-school-for-digital-speakers) for more virtual event speaker prep tips.

# CAE Study Group Starts this Month



Increase your chances of passing the CAE exam by joining the study group that kicks off Feb. 17. Held every Wednesday from 5-7:30 p.m., the CAE study group provides in-depth preparation. Facilitated by current CAEs, the study group meets for a structured case-study series based on the nine domain areas.

There is still time to join the study group: While later registrations will be accommodated, we cannot guarantee your CAE Study Guide will be available by the first session.

During the study group, participants will:

- Enjoy an extended 11-week course.
- Take part in a dedicated test preparation session focused on test-taking strategies and study tips.
- Engage in interactive learning through participant teach-back opportunities.
- Take a CAE pretest to quickly identify areas for concentrated study.
- Receive a CAE Study Guide developed by ASAE.
- Interactively discuss previous week's readings and review questions and key terms.
- Review identified best practices for each domain prepared by facilitators.
- Take a simulated mock-exam.
- Receive CAE test-taking resources to enhance studying efforts.
- Be part of a private online member community of CAE facilitators and candidates to engage in online discussions and share resources outside of the classroom.

CAEs who have passed the exam say that this study group made all the difference. Plus, you'll form a bond with fellow participants and expand your professional network. The May 2021 exam will be held May 1-14, 2021.

/// **FEE:** \$450 (member); \$600 (non-member). Visit [associationforum.org/events](https://associationforum.org/events) to register.



## SmartTech 2021: Evolving with Technology

SmartTech is Association Forum's annual technology conference, built with association professionals in mind. The education sessions are geared not just for IT professionals, but every person and department in your organization impacted by your technology strategy.

This year's conference is focused on Evolving with Technology. Now, more than ever, technology shapes the way we interact with the world. Learn about emerging trends that will shape our future and how to incorporate them into your organization.

Our 2021 SmartTech Conference will be a virtual/in-person hybrid event. In-person sessions will be held at OLC Education & Conference Center in Rosemont, IL.

/// **SMARTTECH** takes place March 30, 2021.  
/// **Visit us online** for more information!



## Women's Executive Forum: Resiliency in Challenging Times

Unprecedented challenges have dominated the past year — yet you've pushed forward nonetheless. The Women's Executive Forum is a celebration of your resiliency and your contribution to the profession.

The event is our annual celebration of women in the workplace. Each year we award a female leader in our industry with the Woman of Influence award and provide a full-day program of networking and education sessions designed to help current and emerging women leaders maintain their resiliency in challenging times.


This virtual event takes place March 3, 2021. Visit us online to register.

## Association Forum Unveils New Business Plan

Association Forum recognizes that the challenges of the past year have forever altered our world. Furthermore, the pandemic and its economic effects have changed the way we do business.

In response, our Board of Directors adopted a new business plan. At its core, this strategy focuses on doubling down on our strengths while also exploring new opportunities.

We all need to look for new revenue streams, new technology and new ideas. We are operationalizing this exploration in our new business plan.

As always, we will bring our members along on this journey and offer ourselves up as an open case study. Stay tuned for more information about the new plan, how we will engage the community and how we intend to implement it. 



## Above &amp; Beyond

Choose Chicago board member **Michael Jacobson** was named to *Crain's* 40 Under 40 list.

Jacobson, president and CEO at Illinois Hotel & Lodging Association (IHLA), was named to *Crain's* prestigious list for 2020. Jacobson has been at IHLA for more than two years.

According to *Crain's*, Jacobson "helped craft the statewide protocols for hotels to reopen amid the COVID-19 pandemic and led the city of Chicago's working group that set new safety guidelines for hotels and tourist attractions, bridging the gap between hospitality stakeholders and public health officials to get hotel operators back on their feet after months of decimated tourism."

IHLA represents and advocates for the lodging industry in Illinois. Members consist of 500 hotels and their employees throughout the state as well as industry partners and suppliers.



Jacobson is a father of two and credits much of his business insight to his 67-year-old father who has owned a sub shop in Portage Park for nearly 50 years. "Seeing his perspective on things as a small business owner helped coach me over the years about what's right and what's wrong," he told *Crain's*. "He's a good source for getting a real-world perspective."

Congratulations to Jacobson for this honor.

## New Association Forum Members

## Individual Members

**Dr. Nancy Crain Burns**, ISPIC  
**Asiaha Butler**, RAGE  
**Kelsey N Cizek**, ADHA  
**Carolyn Day**, Black United Fund of Illinois, Inc.  
**Lisa Doi**, PNC  
**Kim Dooley**, Visit KC  
**Ralph A. Gervasi**, CAE, Gervasi & Associates, Inc.  
**Sarah Stagg Grubbe**, Pass with Flying Colors  
**Gayathri Kher**, fusionSpan  
**Mimi Korcak**, Cremation Association of North America  
**Bunny Lee**, American Bar Association  
**T.W. Li**, Video Parachute  
**Karyn Linn**, Chicago Association of Management  
**Sheila Mulvey**, Zonta International  
**Mary Patrick**, Growth Zone  
**Kimberly Payne-Ward**, ATL Airport District  
**Mary Post**, American Academy of Neurology  
**Erik Skogsbakken**, The Huntington National Bank  
**Lawrence Sloan**, Association of Healthcare Internal Auditors  
**Katrina Stewart**, NYC & Company  
**Norma J. Taylor**, CMP, Tourisme Montreal - Business Events Montreal  
**Jessica Viramontez**, Visit Wichita  
**Jacqueline White**, Association of SAP User Groups

## Forum Plus Members

**John Schroeder**, American Association of Neurological Surgeons  
**Jamie Lin**, American Theological Library Association  
**Zinat Ali**, Association Management Center  
**Michelle Bailey**, Academy of General Dentistry  
**Bill McDowell**, Institute of Food Technologists  
**Dave Adams**, REALTORS Land Institute  
**Mackenzie Nicole Clauss**, SmithBucklin  
**Sara Khan**, SmithBucklin  
**Mary Lilly Rossi**, SmithBucklin  
**Julie Fera**, Society of Actuaries  
**Sharon Rodriguez**, Society of Actuaries  
**Edna Ibanez Hernandez**, Society of Critical Care Medicine  
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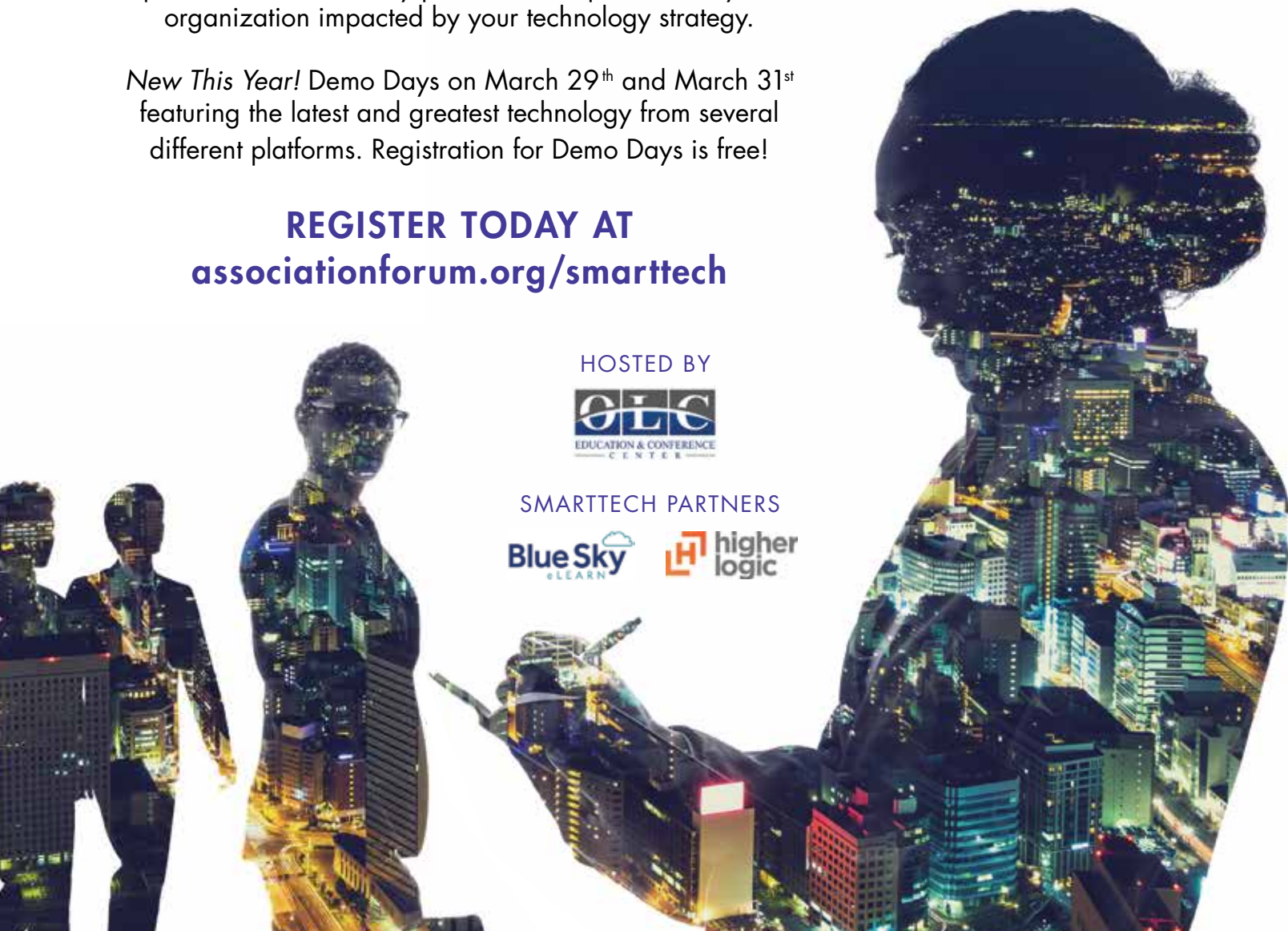
*New This Year!* Demo Days on March 29<sup>th</sup> and March 31<sup>st</sup> featuring the latest and greatest technology from several different platforms. Registration for Demo Days is free!

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# CALENDAR

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

## FEBRUARY

### Association Forum CAE Study Group

Feb. 17 – April 21, 2021  
5–7:30 p.m. CT  
Virtual

The CAE study group provides in-depth preparation for professionals preparing for the CAE exam. Facilitated by current CAEs, the study group meets weekly for a structured case-study series based on the nine domain areas.

### Having the “Courageous Conversation” to Create a Welcoming Environment®

Feb. 24, 2021  
2–3 p.m. CT  
Webinar

This webinar will feature insights for making the business case to stakeholders for creating an inclusive work culture and what it takes to sustain that type of culture within an association. Joel Albizo, FASAE, CAE, CEO of the American Planning Association, will speak on the topic, while Ralph Gaillard, M.Ed., chief learning architect of The Adele Learning Lab, LLC, will moderate.

## MARCH

### Women’s Executive Forum

March 3, 2021  
9 a.m.– 5 p.m. CT  
Virtual

Women’s Executive Forum is our annual celebration of women in the workplace. Each year, we award a female leader in our industry with the Woman of Influence award and feature a full-day program of networking and education sessions designed to help current and emerging women leaders maintain their resiliency in challenging times.

### Highlights from the Welcoming Environment® Research Study

March 24, 2021  
2–3 p.m. CT  
Webinar

Learn about diversity, equity and inclusion tactics and strategies over 5,000 members find to be most necessary for a membership organization to implement and where associations have been most successful in creating a Welcoming Environment® to date. Jon Hockman, principal at McKinley Advisors, will speak. McKinley Advisors partnered with Association Forum to conduct this research. Ralph Gaillard, M.Ed., chief learning architect at The Adele Learning Lab, LLC, will moderate.



# WOMEN'S VIRTUALLY DRIVEN BY EXECUTIVE FORUM

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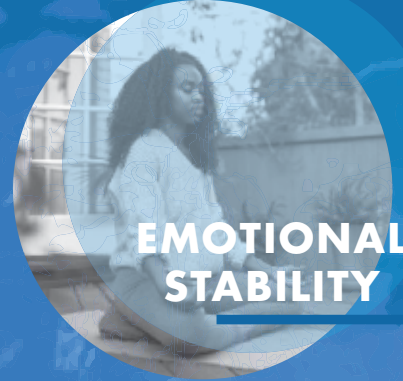
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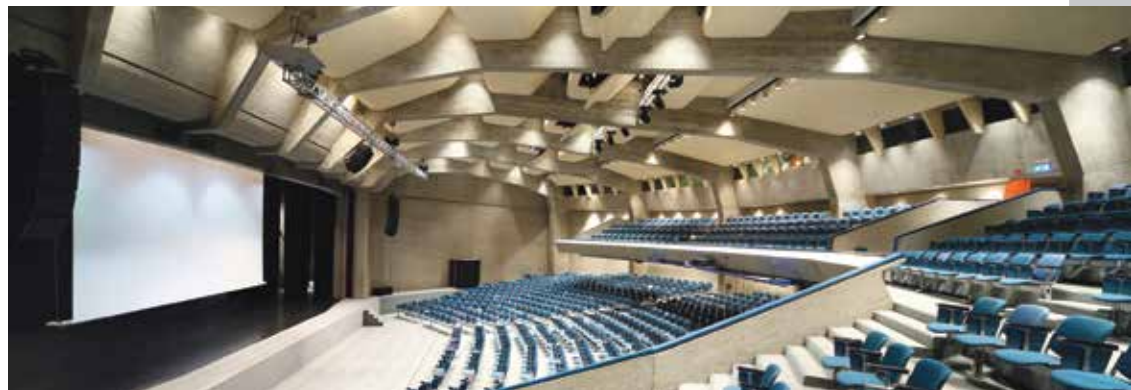
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Huntsville is very drivable from nearby major cities, including Nashville (2 hours), Atlanta (3.5 hours), Memphis (3.5 hours), Louisville (4.5 hours), and St. Louis (6.5 hours). The Huntsville International Airport also offers 10 direct flights serviced by Delta, American, United, Frontier and Spirit.

Our community has so much to offer, and our team has experience supporting and planning meetings. From venue and accommodation RFPs to site inspections and entertainment, we can help you plan your best meeting yet. We can't wait to bring your group to Huntsville.

And in true Southern fashion, you can count on us to be responsive, timely and attentive during the whole process!

## National Speakers Bureau

**Don Jenkins**

109 International Dr., Ste. 300

Franklin, TN 37067

847-281-3568

[Don@nationalspeakers.com](mailto:Don@nationalspeakers.com)

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



Remember the last time you were at an event, sitting on the edge of your seat, hanging on every word the speaker said? You looked around and everyone else was doing the same.

We know who those speakers are.

We've built our business to support you—the organization, the planner, the executive, the audience.

### Our Values

We focus all of our efforts on you—the client. As a statement to this dedication, we do not accept gratuities and incentives to book our speakers. National Speakers Bureau selects the speaker who is right for your event; one who compliments your goals and objectives, as well as your audience.

### Our History

We've been around longer than VHS tapes and know what to watch for in speakers. After 20 years working as a band conductor with music stars across the nation, John Palmer discovered a local speakers bureau in New York City and decided to translate the model to his hometown of Chicago. In 1972, National Speakers Bureau was born.

## Travel Portland

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### Top 5 Reasons To Meet In Portland

#### 1. Great Value — and Values

With no sales tax or food and beverage tax, Portland lets you stretch your budget. We're also big on saving the other kind of green, with a natural commitment to sustainability, inclusion and ethical practices. Portland was named No. 1 Foodie City by Wallethub in 2019.

#### 2. Spacious, Beautiful (and Sustainable) Convention Center

The Oregon Convention Center (OCC) became the nation's first LEED-certified meeting facility in 2004 and went LEED Platinum in 2014. Renovated in 2019, the OCC offers 255,000 sq. ft. of exhibit space, 50 meeting rooms with 55,000 sq. ft. and two ballrooms totaling 60,000 sq. ft.

#### 3. Happy Planner, Happy Delegates (and Lots of Them)

You're already a hero; meeting in Portland will catapult you to super status. Delegates love our city's welcoming culture and famous food scene and Travel Portland's attentive service keeps planners smiling. Travel Portland earned the Meetings & Convention Gold Service Award 17 years in a row.



#### 4. Hotel Package That Keeps Getting Better

With an enviable collection of boutique and big-name hotels, Portland's hotel package has experienced a big growth spurt. Our 7,000 central-city rooms include the new 600-room Hyatt Regency at the OCC, opened in 2019.

#### 5. Award-Winning Transportation

Portland has the nation's best airport — with a convenient, easy-to-navigate transit system that includes light rail, streetcars and the original mode of transport: walking. Portland International Airport (PDX) was voted the nation's best airport by Travel + Leisure readers for seven years running (2013–2019).

#### Visit Phoenix

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[visitphoenix.com/meetings](http://visitphoenix.com/meetings)



#### There's Room To Meet in Phoenix

It's time to go beyond. Reach new horizons through collaboration, defy limits with innovative efforts, and launch your next great venture here.

The Phoenix Biomedical Campus serves as a natural extension of our state-of-the-art convention center, our portfolio of outdoor venues complemented new and reimagined accommodations, and our walkable downtown core gives way to lush desert landscapes. In Phoenix, there's more than enough room to customize your next event.

Plan your future meeting at [visitphoenix.com/meetings](http://visitphoenix.com/meetings).

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



In a hypothetical world with no pandemic:

## What is your ideal vacation?



An ideal vacation for me usually involves some warm weather, a calm beach and no Wi-Fi. Being able to unplug and reset is usually the goal of my vacation. Whether I'm napping on the beach or hanging out with friends and family, a coastal trip always seems to be the best way to fully relax and get away from the hectic city work life. A frozen, tropical drink is usually a must as well.

— Gina Orlandi, marketing project manager, CCIM Institute

We had just traveled to France last fall for the first time: several days in Paris, with a few up in Normandy — all incredible experiences. That trip fueled the plans to travel to other parts of Europe: Spain (my wife taught Spanish in school), Italy, Ireland, Croatia. We have family from those places. Then the pandemic came.

The other longtime desire is to drive through Route 66. It's something I've wanted to do for many years. But most importantly, we have our only grandchild in San Diego. Our son is a naval officer stationed there, so that will be travel priority No. 1 when it's safer to do so.

— Bill Grusich, CMP, FASAE, senior vice president, sales, Associated Luxury Hotels International



I have always wanted to visit Ireland. I would love to travel there for the scenery, history and to visit the areas my family members emigrated from in the 1850s. A trip like this seems like the perfect getaway to unplug and really enjoy living in the moment.

— Emily Harris, MBA, CAE, marketing manager, Association of Nutrition & Foodservice Professionals



Friends and colleagues often find this hard to believe, but my ideal vacation is one where I don't have to plan anything! I'm really okay being in the passenger seat and winging it. That said, it doesn't hurt if the vacation has sun, water and wine. I like to vacation somewhere new, relax and get to experience what another place, community and culture has in store.

— Bob Moore, MA, CAE, executive director, American College of Osteopathic Family Physicians



I haven't always been the best about prioritizing vacations, but like many of us, being home these past few months has made me crave some new and exciting travel adventures. In the past, my dream vacation would always include the beach, however the pull to travel internationally has been growing more and more. My wife and I have started a growing list of destinations that we can't wait to start checking off: London, Sweden and Italy — to name a few. I'm looking forward to the time in the (hopefully) not-too-distant future when we can travel in person instead of having to rely on Netflix to bring us our travel fix!

— Kellie Braband, account executive, Bostrom





# Considering Virtual or Hybrid Events?

eShow Has You Covered with Our Virtual Event Management (VEM®) Products!

**We can create a custom program for your needs, including:**

- Virtual exhibit hall, networking rooms, interview rooms, educational sessions, lounges, and keynote presentation rooms
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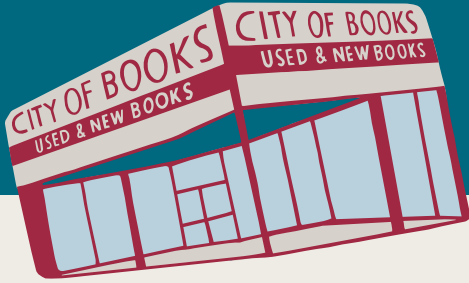
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# Remember Meetings?

They're like Zoom calls...but in person.  
With real, live people.  
(Weird, right?)



Meetings—like all the cool stuff at a Portland vintage store—will be coming back in style soon, along with craft breweries, food carts, hand-made goods, art, music, donuts, bikes, hikes, and all the things that make Portland a great place to meet.



Want to have a real meeting in Portland?  
How about a sweet deal?

Book 25+ rooms on peak night for your event during eligible dates in 2020, 2021 or 2022 and you'll earn up to **\$15,000 in room rebates** to re-imagine your event when it is safe to meet again!



2020	2021	2022
<b>\$20</b>	<b>\$15</b>	<b>\$10</b>

*Rebate per actualized room night*

Contact: Desiree Everett, CMP, CGMP—Vice President of Convention Sales  
[desiree@travelportland.com](mailto:desiree@travelportland.com) | 503.275.9781



Terms & Conditions: Event must be contracted by May 31, 2021. Applies to events in 2020, 2021 and 2022. \$20 rebate for groups meeting in 2020, \$15 rebate for groups meeting in 2021, \$10 rebate for groups meeting in 2022. Applies to new business and tentative business currently under negotiation. Sales leads must come through or be coordinated with the Travel Portland convention sales team, or via [travelportland.com](http://travelportland.com). This program applies to events utilizing one or more hotels in the greater Portland region with a minimum of 25 or more guest rooms on peak night. Cash incentives will be paid no later than 60 days after group departs. Payout is based on actualized pick-up from revenue generating rooms. The cash incentive rebate is limited to a maximum of \$15,000 per event. Meeting rewards program cannot be combined with other Travel Portland incentive offers. Additional incentives from hotels may be available—ask your hotel sales manager for more info.

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