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#### **Features**

#### COVER STORY

#### 12 On the Frontier

A new meeting landscape has emerged after COVID-19, with some changes likely to stick around for years to come.

#### 20 Meeting Al Fresco

The pandemic has forced us to get creative with where we eat, learn and connect. Will a shift to outdoor events be in our future?

#### 28 Better Together

While hybrid and virtual events were necessary during the pandemic, some associations have turned them into great revenue-generating opportunities.

#### 32 What's the Scenario?

In these uncertain times, associations should have a variety of back-up plans for events.

#### **Departments**

#### PERSPECTIVE

4 Letter from Suzanne Berry. Interim President and CEO

#### PULSE

6 Worth the Squeeze

#### LAW REVIEW

8 Legal Concerns for Restarting In-person Meetings

#### IN THE KNOW

- 36 Association News
- 39 Calendar
- 42 Ad Index

#### WORK-LIFE

48 What are you most looking forward to in 2022?

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INFORMING & INSPIRING TODAY'S ASSOCIATION PROFESSIONALS

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### PERSPECTIVE | LETTER FROM THE CEO |



SUZANNE BERRY, MBA, CAE

INTERIM PRESIDENT AND CEO ASSOCIATION FORUM

### **Reunited in Strength**

It's an honor to serve you as Association Forum's Interim President and CEO following Michelle Mason's departure in August to become the President and CEO at ASAE.

In the January/February 2020 issue of *FORUM*, Michelle wrote, "For businesses and organizations worldwide, the pandemic has ushered in uncertainty." Little did we know that a level of uncertainty continues to be present. Nothing is the same as it was pre-COVID, but associations are used to being nimble, creative and doing more with less. Viable associations have always had to pivot with industry, demographic and economic changes. Let's share our success stories at the 2021 Holiday Showcase and in our online communities. Let's continue to learn from one other.

Association Forum cautiously ventured back to in-person events starting with our 2021 Honors Gala (pg. 37). We were pleased to safely host 350 attendees. Shortly after, we put on 2021 Forum Forward: Camp Innovation, a hybrid event that featured virtual and in-person tracks. Forty-three people attended the virtual track, and 81 attended the in-person track. Meanwhile, 31 executives attended the in-person Forum Forward CEOnly program.

The Association Forum staff did an amazing job ensuring that all safety protocols were followed for every event. With the use of color-coded stickers and bracelets, attendees indicated their preference for interaction. We also followed Chicago city guidelines for both events.

The 2021 Holiday Showcase theme is "Reunited in Strength." The planning committee had three principles in mind as they designed the schedule and experience:

- 1. Highlight Welcoming Environment<sup>®</sup>.
- 2. Embrace innovation and quality.
- 3. Have fun and stay positive.

These three principles are not only representative of our industry's current climate but also a steadfast way to craft an event. We suspect that by leaning into the strategies that are helping our organizations through this pandemic, we'll be able to better serve our members and communities for years to come.

Within this issue, you'll find ideas to help your events team during these challenging times. From scenario planning (pg. 32) to open-space learning (pg. 20), you'll find innovative and relevant content for your events strategy. Our cover story (pg. 12) is all about COVID-era changes that are here to stay. We know that the past months have been trying, but we're also ready to recognize the positive changes that came from these unprecedented times. Finally, we know you've either planned or participated in a hybrid event in the past year. It's time to talk money and how those hybrid events (pg. 28) can be revenue-generators for your organizations.

As we close out another calendar year, we are grateful to have you as a part of this community. Association Forum's members have proven to be resilient, innovative and compassionate during these times. We look forward to continuing this important work in the new year!

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#### ENSURING AN INCLUSIVE ENVIRONMENT

As part of our efforts to provide a Welcoming Environment<sup>®</sup> 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<sup>®</sup> a nuestros miembros, le proporcionamos una copia de nuestros Valores Fundamentales traducidos al español por Interpro Translation Solutions, Inc.

CORE VALUES

#### 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 dependeremos 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.

#### ASSOCIATION NEWS AND TRENDS

2020 changed meetings forever. As tough as the year was — there was an 84% yearover-year revenue loss for annual association events compared to 2019 — it also laid the groundwork for the future. The adoption of virtual and hybrid meetings has boosted attendance, and associations are feeling more comfortable than ever with such offerings.



#### **Gaining Steam**

As costs decreased and ease of participating increased, event attendance shot up. Associations plan to dive further into virtual and hybrid programming, potentially only increasing attendance numbers going forward.





Sources: International Congress and Convention Association, 2021 Association Communications Benchmarking Report, Encore.

### Worth the Squeeze

PULSE

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### Legal Concerns for Restarting In-person Meetings

#### Q: MY ORGANIZATION IS MAKING PLANS FOR RESTARTING IN-PERSON MEETINGS. WHAT SHOULD I BE CONCERNED ABOUT FROM A LEGAL PERSPECTIVE?

A: There are new issues that you should address, and you also should make sure your association is covered on some of the more traditional legal concerns relating to meetings. That includes health and safety, force majeure and intellectual property.

#### Health and Safety

COVID-19 does not appear to be going away, and no one knows what the next health crisis might be. Recent experience has reminded us of the importance of adopting meeting attendance policies that not only comply with applicable national, state and local mandates and other guidance, but also reflect the needs and culture of the association's membership. While they must follow the most stringent national, state and local rules applicable to their meeting site, associations can, if they like, adopt more restrictive safety protocols. Thus, for example, some associations have elected to require that attendees be fully vaccinated and/or have had a negative COVID-19 test just prior to the meeting. Attendees may be required to provide proof of vaccination or self-verify. Those that require proof of vaccination may elect not to retain copies of that proof as it generally includes personal health information.

In any event, once associations establish their protocols, they should communicate them to all meeting attendees, including exhibitors and other vendors. As a condition of attendance, many associations now require attendees to sign a form that includes: (i) an acknowledgment that in-person meeting attendance during the ongoing pandemic carries risk due to the contagious nature of the COVID-19 virus; (ii) representations that they will not attend the meeting if they are symptomatic of COVID-19 in any way (even if fully vaccinated against COVID-19) or if they believe they have recently been exposed to someone with COVID-19; (iii) representations that they will comply with all association protocols; and (iv) an agreement to assume all risks associated with attendance and waive any claim for liability against the association. The communication should make clear that the rules applicable to the meeting may change over time. Agreements between associations and their host facilities and vendors should include comparable health and safety requirements for any staff working at the association's meeting.

#### **Force Majeure**

By now, association executives surely recognize the importance of having well-drafted force majeure provisions in their facility and vendor agreements. Historically, hotels, convention centers and other vendors have argued that force majeure provisions permitting termination only if performance is "impossible" or "illegal" should be read narrowly and should be applied in limited circumstances. These past months have shown that facilities and associations have not always agreed as to how force majeure provisions should be interpreted and applied in a COVID-19 context. As associations negotiate agreements for future events, they should provide themselves much stronger authority for terminating under force majeure by including language that allows for termination not only when it is impossible or illegal for the facility to make the venue available, but also when it is inadvisable or impracticable for the association to hold a successful meeting under the terms contemplated by the underlying agreement.

In addition, associations should try to avoid clauses that would require them to provide notice of termination due to a force majeure event within, for example, 10 days of its occurrence. With "events" like COVID-19, it is difficult to identify the specific date when the force majeure event occurred and triggered the requirement to provide notice. COVID-19 also makes it difficult for associations to determine how far in advance of a meeting they can reasonably cancel. While associations and their members often need to know well in advance if the meeting is happening, facilities typically take the position that it is premature to claim force majeure until just prior to the event. Thus, to the extent a notice provision cannot be avoided, it should relate to the timing the association and its members need to cancel travel plans and switch from an in-person to a virtual meeting, not to the date the force majeure event "occurs."

In addition, the COVID-19 experience has made clear that it is important for associations to take a close look at the cancellation and attrition

provisions in future agreements. For example, given the uncertainty of the long-term impact of COVID-19 on meeting attendance, associations should negotiate for maximum flexibility to adjust room block numbers in the years and months preceding future meetings. To the extent possible, existing agreements also should be reviewed to determine whether they can be amended to reflect what are likely to be more realistic future attendance and related food and beverage numbers.

#### **Intellectual Property**

In-person meetings afford meeting attendees opportunities to network that are simply unmatched in a virtual environment. And associations often want to memorialize those networking events through photographs. As associations restart in-person meetings, they should make sure they obtain permission from the individuals being photographed. The necessary permissions can easily be incorporated into registration materials.

Associations also should review and update speaker agreements to ensure that, at a minimum, speakers:

- Provide the association with a non-exclusive license to use the speaker's presentation (for purposes of publishing, distributing, creating compilations, etc.);
- Represent that their presentation is original (or that rights have been obtained and credit will be given), accurate to the best of the speaker's knowledge, does not infringe on the personal or property rights of others and does not include any material that is defamatory or otherwise inappropriate;
- Grant the association permission to use the speaker's name, likeness and biographical material in connection with the meeting (and future uses); and
- Acknowledge that they will not receive any compensation for their presentation.

COVID-19 has prompted changes in meetings that are likely to remain in place for a long time. As associations restart in-person meetings, they should take care to address both new and old meeting-related legal issues.

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



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WHEN THE PANDEMIC CRUSHED THE EVER-CRUCIAL IN-PERSON EVENT LANDSCAPE, LEADERS FLIPPED THE MEETING SCRIPT, DIVING HEAD-FIRST INTO ALL THINGS VIRTUAL, HYBRID AND EVEN OUTDOORS.

I hear, 'There is no going back' a lot. When we hear that, we need to proactively replace those words with a go-forward strategy."

On the Frontier, pg. 12

FORUM

If you intend to host the same event you've always hosted, but outdoors, it's not going to deliver. If you want to host an event outside, your planning is different from the start. Knowing your format early is key." Meeting Al Fresco, *pg. 20*  We knew in March 2020 there was no going back we would have to provide both an in-person and a virtual conference, so we would not alienate an important side of our membership."

Better Together, pg. 28

While COVID-19 has had an effect on events on a much larger scale and the environment continues to change, scenario planning and strategies should always be at the foundation for any organization's events."

What's the Scenario?, *pg. 32* 



A new meeting landscape has emerged after COVID-19, with some changes likely to stick around for years to come.

By Kate Rockwood

ciation playbook for events — get everyone in a room and serve up great content with networking opportunities — stayed the same for so long. Quite simply, it worked. Then COVID-19 blew up the playbook. Since, povation and trial and error for

here's a reason that the old asso-

it's been a time of innovation and trial and error for planning and hosting events.

"An event now is completely different than before," says Kimberly Gishler, executive director of the Corporate Event Marketing Association (CEMA). "You have to be agile and nimble all the time. You read the signals of what's going on in the moment and make decisions based on that."

Things only got trickier in 2021. The Delta variant and inconsistent vaccination rates tossed cold water on a major return to in-person events. At the same time, many are pandemic-weary and ready for more face-to-face interaction. Such conditions have left associations to navigate the murky waters of mixed vaccination statuses, varying contact comfort levels and higher expectations for virtual events.

But if there's anything the pandemic has taught, it's that associations need to be adaptable. Some organizations have responded with thoughtful in-person events, while others blazed a digital path, cutting their teeth with all things tech. All of these meetings look a bit different than in years past, but success hinges on plunging into the messiness of this new reality.

"I hear, 'There is no going back' a lot," says Mary Byers, an association adviser and author of *Race for Relevance: 5 Radical Changes for Associations.* "When we hear that, we need to proactively replace those words with a go-forward strategy."

Here's how associations are venturing out into this new frontier of events, including navigating safety, technology and content needs.

#### **The New Normal**

In 2022 and beyond, events will continue to provide the option to attend in person and virtually, with varying options for engagement depending on where the attendee lives, says Jason Enany, head of operations for New York-based virtual and hybrid event and meeting company Convene. "I expect that amenities will be a major consideration to entice members to return for events — from wellness facilities (skin care, massage, nutrition and exercise) to premium food and beverage offerings. Organizations can utilize quality-of-life benefits to make events stand out going forward," Enany says.

Meanwhile, virtual elements of events, whether in-person or not, are expected to not just stick around but also improve. Early trends include offering remote audience chats, virtual breakout sessions and AI-powered networking. "Virtual meetings have already become more interactive, and as they continue to evolve, they'll become more like talk shows with guests, videos, music, etc.," Byers says. The format, she says, with small in-person audiences and a greater portion watching remotely, "has been a staple of the networks for decades because it works. Associations should consider adapting the concept as they look for unique and proven ways to meet the needs of both the in-person and online audiences."



Virtual meetings have already become more interactive, and as they continue to evolve, they'll become more like talk shows with guests, videos, music, etc."

- MARY BYERS, ASSOCIATION ADVISER AND AUTHOR

Many hotels and convention centers have already invested millions of dollars to transform facilities for this enhanced reality. America's Center in St. Louis, for example, unveiled a new StreamStage that provides high-volume internet bandwidth for live streaming, an HD camera and a studio backdrop.

"Over time, the difference between attending in person or virtually will become less prominent thanks to advances in technology," Enany says.

#### **Hybrid Heats Up**

Hybrid, hybrid, hybrid: The word hasn't been said this often since the Toyota Prius debuted. But just as hybrid teams are considered the future of work, many association professionals think hybrid events will dominate the event landscape moving forward. Technology, naturally, will help lead the way. Sixty percent of association event planners say they will host a hybrid event in 2021-2022. According to 2021 research from EventsForce, 19% of associations have attracted new members as a result of reaching out to a wider online audience because of expanded digital access. But a lack of in-person events has been tough on associations, too. In fact, 64% of respondents in the EventsForce survey said they've experienced revenue loss from events, and 32% have seen a drop in membership.

Overall, associations have seen real benefits from offering hybrid events:

- **90%** expanded their audience reach
- 41<sup>%</sup> saw more engagement from existing members
- 31<sup>%</sup> got more valuable data from events
- **29**<sup>%</sup> saw new revenue opportunities from on-demand content

What hybrid means can vary widely. For some, it's simply posting a recorded version of a live event or a program. For others, it's much more complex think a blend of in-person offerings with interactive virtual elements for members who can't or don't want to attend in person. For the associations that are really diving into this realm, that means creating "events that work with chat rooms, multimedia, live streaming," Gishler says. "You have to change your mindset and think about how you will engage each audience."

But, to be sure, having some kind of virtual event element is a must for all associations these days, and it's something that Byers says won't disappear even after the pandemic is under control. "Pre-pandemic, everyone was moving really slowly toward digital-first. That's been transformed almost overnight," she says.

How associations approach hybrid events — or whether they offer them at all — will largely depend on the association's size, budget and opinions of its members. Sheri Mead, principal of Chicago meeting management consortium Mead & Co., has seen a distinct split between her smaller and larger association clients.

"The larger associations I work with have been on a 'stop, go, go, stop' continuum, and many have ended up producing smaller, hybrid programs," she says. "My smaller associations have been more conservative. They haven't produced any in-person events to date and don't plan on it until at least April 2022."

Many of the smaller associations she works with have fully embraced virtual-only options for board meetings and educational programs. She expects that, in the near term, most will stick to all-virtual and then branch out to in-person events, but few small associations will host hybrid events. "They don't have the budget for it or see the perceived benefit of producing hybrid events," she says.

It's true that offering a robust digital experience especially for a large live event — can be costly and time-consuming. In many ways, it's like putting on two separate events. But many associations have done just that or are planning to do so for annual meetings. It makes sense at a time when many people are still very reluctant to travel or interact in large groups.

"In-person is the No. I choice of our members, but hybrid will never go away for safety and travel concerns," Gishler says. "You can reach more people with a digital event. The challenge is to make it relevant and valuable."

#### The In-person Eventscape

While planning an association event is never a simple task, tossing a pandemic into the mix has certainly complicated matters. Along with all of the typical event-planning struggles, associations must also consider a host of new questions: Do you offer on-site COVID-19 testing? What about wristbands to show comfort level? How much space should be provided for people to socially distance and feel comfortable? What happens if someone tests positive?

And while people are more accustomed to "living with" COVID-19 and the safety measures that come with it, there is also a lot of uncertainty around safety protocols. Some states have mask mandates, while others have bans on mask mandates. Some cities



#### Nearly **2 out of 3** associations plan on hosting a hybrid event in 2021-2022.

Source: EventsForce

have indoor capacity restrictions, while others don't. Rules can vary city to city or venue to venue.

"It's the Wild West as far as events are concerned," Byers says. "Different states have different requirements, and these change frequently. We need to be upfront that in-person meetings aren't what they used to be, so that attendees aren't disappointed."

Clear and careful communication is key going forward — and an approach that's been a top priority for associations that have already hosted in-person events or are planning them in the near future. Constantly shifting guidelines and COVID-19 case counts demand it. That's been the case for the American Association for Anatomy, which is planning a large-scale, in-person annual meeting in the spring of 2022, says Shawn Boynes, executive director, American Association for Anatomy.

"There's been so much uncertainty and rapid changes," Boynes says. "We may have to wait until the first quarter to define many safety precautions."

While many details might be up in the air in the future, many associations already know some of the areas they must tackle to host a successful and safe in-person event.

#### Vaccination requirements and screening

There's no clear verdict on whether members should be required to be vaccinated to attend an event. A common path — which CEMA used for its in-person summit in July in Phoenix — is to require proof of vaccination or a negative COVID test to enter the event. CEMA worked with the company Clear to establish attendees' vaccination statuses, Gishler says. "We also provided free on-site COVID testing for people who didn't have their Clear credentials established," she says. Several hotels, such as Marriott and Hilton, have partnered with healthcare groups to offer advance or on-site COVID-19 testing.

If you're planning on requiring vaccination to attend, an expectation that will probably increase, "Make sure you're giving people plenty of time to comply if proof of vaccination is required," Byers says.

#### **Color-coded comfort levels**

In a pre-COVID world, handshakes — and even hugs — were often the norm at organization events. Now, there's an awkward forward-and-backwardlean routine that people go through as they decide how to greet each other. Some organizations have removed the guesswork by offering color-coded badges, bracelets or lanyards. These badges let others know if someone is open to handshakes or hugs (green), is only up for conversation and elbow bumping (yellow) or prefers to keep a distance from other event attendees (red).

CEMA used color-coded lanyards at its summit, and they were a success, Gishler says. "We knew



**OU** of corporate sponsors said they are interested in investing in virtual events as long as they include some kind of interaction.

Source: AIM Group

people had to feel safe. We had the best feedback we've ever had and felt we did the right thing to take these extra precautions," she says.

#### **Eating and socializing**

"Buffet-style meals are off the metaphorical table," says Enany. Pre-packaged meals or plated meals are now the norm, and tables that once sat eight or 10 people are now being set for four. At the same time, some event organizers are also enticing attendees by offering premium food and beverages, Enany says.

Many event organizers and venues are also looking at the outdoors with new eyes. (See pg. 20 for a full breakdown of running successful outdoor events.) If the weather permits, your event attendees will probably appreciate a chance to eat or socialize outdoors. Just be prepared that you might find it harder than usual to get them to stop socializing.

"People are excited to be together again and have that energy exchange with one another," Gishler says.

#### The Keys to Virtual Events

Pre-COVID-19, the digital side of an event was often treated as an afterthought. And they usually weren't very exciting, Byers says.

"Virtual was considered less desirable mostly because so many were audio with slides or a talking head," Byers says. "But now that we've seen how they increase reach and save attendees both time and money, they are no longer lesser options."

The tricky part is tailoring the material to a virtual audience, which requires a different approach than a live one. For virtual-only events, the approach is simpler since only one audience needs to be considered. For some of Mead's clients, that has meant creating education-based webinars that have put some of the associations' younger members front and center on camera.

"It's been a great opportunity for these younger members. They've been able to move up in the organization without having to travel," she says.

The digital portion of an in-person event, especially if it includes live elements, is much more complicated. In fact, 59% of association event planners find hybrid events to be complex and time-consuming to manage.

With that in mind, some associations are hiring third-party companies to help them manage the virtual part of an event or are working with venues that provide staff to help. Here's what else to consider when planning a virtual event.

VIRTUAL EVENT

Keep it short

Focus on

sponsors

and engaging

PLANNING

Make a content plan

#### Make a content plan

First, you need to consider what kind of virtual content you will offer, when you will offer it and in what format. For example, will you livestream the in-person event or only offer pre-recorded content? What kind of interaction (polls, breakout rooms) will you have with your virtual audience, and will time zones be a factor? "To create the best virtual experience, you have to consider the production factor," Boynes says. "How do you pull together something cohesive that gives the virtual audience a similar experience to the in-person audience? What keeps them glued to the session?"

Don't forget to change up your marketing approach, too. Unlike an in-person event, virtual events are easy to skip or forget entirely. For that reason, be sure to ping your registered attendants by email and social media channels with event reminders. Play up the bonuses of taking part in the event, such as a chance to network, listen to topnotch speakers or experience a sense of community.

#### Keep it short and engaging

Don't expect the same attention span from your virtual attendees as you would your in-person ones, Boynes says. Also consider the kind of environments where your virtual participants will be watching. "Many people are still working from home, have children and other things going on," he says. "It's easy to be distracted and step away."

With that in mind, you might want to keep your digital content shorter and snappier. CEMA, for example, learned from its members that 90 minutes was the maximum amount of digital content they could take in at one time, Gishler says. Due to that, CEMA decided to livestream the keynote and townhall portions of its Summit and offered the rest on demand.

Byers expects that many organizations will stretch out their digital content so it lasts much longer — weeks or even months — beyond the event itself. "I believe we'll see more before/during/ after content planning where some learning will be released before a meeting, more will be provided as a livestream during the meeting and more will follow the meeting," she says.

#### Focus on sponsors

The issue isn't that sponsors aren't willing to get behind a virtual event. In fact, 80% of corporate sponsors said they are interested in investing in virtual events as long as they include some kind of interaction, according to an AIM Group survey. But sponsors still want to know their return on investment, which can be a bigger struggle. "It's harder in a virtual environment to display and promote your sponsors," Boynes says. In response, many associations have gotten creative with new virtual sponsorship avenues, such as sponsored livestreams or event apps, Enany says.

#### Looking to 2022 and Beyond

Despite the curveballs that COVID-19 has thrown, many association professionals expect associations to hold more

in-person events in 2022, especially in the second half of the year. About 6 in 10 marketing professionals said they expected to attend an in-person event in the fourth quarter of 2021 and the first half of 2022. That number went up to 7 out of 10 for the second half of 2022, according to a MarTech survey.

As more people get vaccinated and COVID-19 cases drop, attendance at in-person events will rise, Enany says, but "there will also be a contingent of attendees who rarely return, and it's important to build events that can accommodate the needs of both groups."

Given all of the changes that the pandemic has brought to events, it's also time for associations to rethink (at least temporarily) what a successful event looks like in the first place, Boynes says.

"Associations would love to have a crystal ball, but it's hard to say what the future holds," Boynes says. "Pre-pandemic, success was measured by how many visitors, booths and revenue. Now we need to think about: Did the meeting meet the intended goals for the participants? Did they learn what they expected and make the connections they needed? Changing the measurement of success doesn't mean you can't be successful."

KATE ROCKWOOD IS A CHICAGO-BASED WRITER.

For all the latest event-planning tips, visit *forummagazine.org/category/events*.



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The pandemic has forced us to get creative with where we eat, learn and connect. Will a shift to outdoor events be in our future?

## MEETING



s COVID-19 and its various variants continue to wreak havoc, outdoor spaces have become vital to maintaining a sense of normalcy. Restaurants, desperate to balance new restrictions with guest experiences, have

taken to the streets, lining up tables, chairs and even igloos where cars once parked. Schools have moved classrooms under tents to allow for more physical distancing and better ventilation.

Associations, too, are looking for ways to bring members face-to-face safely. Transmission risk is a major factor when choosing a venue for events, and associations are weighing all of the options: outright cancellations, postponements, going virtual or moving outdoors. After all, the odds of catching COVID-19 indoors are 18.7 times higher than in open-air environments, according to Japanese researchers.

The move outside has clear benefits: increased ventilation; greater ability to maintain safe physical distance from others; potential for attendees to feel less anxiety and stress given reduced infection concerns; and even some opportunities for better thinking and conversations by changing where business is normally conducted. But there are drawbacks, too — Mother Nature doesn't always cooperate, for instance. Here are factors that associations should weigh when considering to move events outdoors.

#### **Decide Your Format Early**

Before choosing a meeting format, Aaron Wolowiec, owner of Event Garde, asks his clients what the event looked like pre-pandemic and what the expectations are now. Red flags go up when people expect the same experience despite new safety protocols and other concerns.

"Be thoughtful about what you're trying to achieve," Wolowiec says. "If you intend to host the same event you've always hosted but outdoors, it's not going to deliver. If you want to host an event outside, your planning is different from the start. Knowing your format early is key."

Wolowiec suggests bringing in decision makers early on to get buy in for changes to the format, timing or venue. Start by reaching out to your board and staff, then to past attendees, exhibitors and sponsors. Whether you connect via a survey or conversation, gather input about who will - or won't — support the event and why.

Once a decision is made, communicating the format to attendees is important. "You will have longtime attendees who are coming to an event that's called the same thing, expecting the same thing," Wolowiec says. "Be clear about what has changed so they're not disappointed."

#### A Historic Move

The Chicago Automobile Trade Association (CATA) moved its most popular event,

Chicago Automobile Trade Association

The Chicago Auto Show moved a portion of its annual event outside, with the street fest including live music, local food and an opportunity to test drive cars for the first time.



the Chicago Auto Show, from February to July earlier this year. It was the first time in the show's more than 70-year run that the event was held during the summer.

"While our first choice was to hold the event in February, we quickly realized that the timing wasn't ideal, primarily due to the pandemic and the vehicle chip shortage," says Jennifer Morand, director of public relations and social media at CATA. "We tried to push the event back a couple of months, but saw that timing wasn't going to work, either. Ultimately, the July time frame allowed us to get creative and try new things, and the exhibitors really embraced it."

The event was held inside McCormick Place's West Building and outside along the city's streets. Organizers of the auto show plan to return to February timing in 2022 because it helps kick off the dealers' spring selling season. Morand says, "If February doesn't work out again, we are definitely keeping an eye on a spring/summer time frame."

#### **Change Brings Innovation**

The Event Garde team recently proposed an outdoor, festival-like educational experience for a client to allow for more physical distancing and better ventilation. The event, dubbed "Learn-a-Palooza," would

take over a hotel parking lot and feature several stages with different education tracks. Pipe and drape booths would be replaced with open-air tents.

#### **OUTDOOR VENUE CONSIDERATIONS**

#### Thinking of hosting an outdoor event? Ask these questions.

- > Do you have attendance restrictions or minimums?
- > What is your venue's sanitation process?
- > Is there a backup plan for inclement weather?
- > Will you offer outdoor experiential activities (yoga, fly fishing, hiking, a fun run)?
- > What kind of audiovisual equipment do you need for your outdoor space?
- Do you have testing requirements at your property?
- Do you offer on-site COVID-19 testing? If yes, what are the costs?
- > What are your protocols if someone on-site tests positive?
- Is hotel staff required to be vaccinated?
- What are your catering protocols (buffets, individually packaged meals, etc.)?







Nerthuz/iStock / Getty Images Plus via Getty Images

Associationforum.org 23

Similarly, the auto show launched a four-night street fest for attendees to enjoy live music and local food and to interact with 30 vehicles outside of McCormick Place. The event brought more face time with automakers, with many providing outdoor test drives for the first time. Of those that ran outdoor test drives, they far exceeded any goals they had going into the auto show.

This was also the first time the auto show sold tickets exclusively online. Using an electronic ticketing process resulted in gathering more data from attendees while eliminating the lines that typically formed at the box office. And because of space limitations, the auto show did not offer complimentary or discounted tickets as it had in the past. Exhibitors noted in their feedback they were pleased to connect with higher-quality attendees (people who paid to enter compared to free access).

#### **New Challenges**

When the National Conference of State Legislatures (NCSL) planned its Executive Committee Meeting, attendee safety and the on-site experience were top of mind. "We chose a warm destination as a thank you to our leaders and because we wanted outdoor space," says Meghan Keelean, CMP, senior meetings manager, National Conference of State Legislatures.

The association ultimately landed at the Hyatt Regency Grand Reserve Puerto Rico, where the receptions, meals and committee meetings were hosted under a covered pavilion on the beach. Hotel check-in and registration were outside, too. All was going smoothly until an overnight storm flooded the property.

"Luckily, we moved our activities indoors to a large space with open windows and doors," Keelean says. "Attendees were spaced out and able to enjoy the event, but we had to pivot quickly."

While weather wasn't an issue for the auto show, there were delays in receiving permits for its outdoor street festival. As local events began opening up rapidly, Chicago officials had an influx of permits to sift through. Morand and colleague Jim OBrill, director of marketing for CATA, kept the show's exhibitors, sponsors and attendees informed along the way. "Whether we were waiting for permit approvals, changing floor hours or adding new protocols, we communicated it all," OBrill says.

#### **Keeping Attendees Safe**

Health experts agree that being outdoors with others is safer than being indoors, but there are still risks involved with hosting any in-person event.



CHICAGO AUTO SHOW 2021 VS. 2	020	
	SPECIAL EDITION AUTO SHOW 2021	AUTO SHOW 2020
Dates	July 15-19, 2021	Feb. 8-17, 2020
Number of days	5	10
Average time spent at show	6 hours	4 hours
Square feet	500,000	1 million
Percentage of attendees who plan to purchase a vehicle in 12 months	80%	<b>70</b> %
Registration	Online only	Online and in person

While the Centers for Disease Control and Prevention does not provide guidance around total attendee numbers for events, it suggests that "organizers should work with local public health officials and follow applicable local laws and regulations ... to determine the prevention strategies needed in their area."

The auto show was one of Chicago's first major public events to re-open McCormick Place. To limit crowds, organizers did not host the typical black-tie gala or themed days (i.e., Women's Day, Family Day) in 2021. "We fought hard to host it in July and made adjustments to make it possible for state and city officials to approve of our event as we implemented strict health and safety guidelines and expanded the event outdoors," OBrill says.

When planning the state legislatures' meeting, NCSL needed permission from Puerto Rico's governor to host the event. They had to seek a dispensation via a letter stating the venues would be under 30% capacity (the limits at the time of the meeting) and outline what strategies would be used to mitigate the risk of COVID-19. In addition, attendees and staff needed to adhere to COVID-19 testing requirements of having proof of a negative result at the airport within 72 hours of arrival. If guests didn't bring proof of a negative test, they were required to get one within 48 hours or face a fine.

As of September, the Chicago Department of Public Health (CDPH) recommended that event organizers require attendees to be vaccinated against COVID-19 or have a negative COVID-19 test no more than 72 hours prior to attending an event. To create a safer event, CDPH recommends checking documentation of vaccination or negative test status, if feasible. If vaccination or negative test status cannot be checked, CDPH recommends that all attendees, regardless of vaccination status, wear masks whenever social distancing cannot be maintained.

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## BETTERTOGETHER

While hybrid and virtual events were necessary during the pandemic, some associations have turned them into great revenuegenerating opportunities.

By Candice Warltier

fter the pandemic hit, many associations quickly discovered the skills necessary to deliver successful virtual events. In the process, association leaders realized that they were able to attract new sponsors and new members

who typically couldn't attend in-person events due to scheduling or financial constraints. Plus, virtual offerings revealed an opportunity to generate even greater revenue than in-person events.

The American Brain Tumor Association (ABTA), the nation's oldest nonprofit organization dedicated to brain tumor education, support and research, experienced this shift when it pivoted from an in-person to a virtual conference.

"It was an excellent conference," says Ralph DeVitto, president and chief operating officer, ABTA. He notes 600 people registered for the in-person event in 2019 while approximately 1,300 people registered for the virtual event last year.

The in-person conference typically attracted people who could drive to Chicago. But a virtual session created new opportunities: People from across the United States and 20 other countries attended the event. "For our community, going virtual was a great option," DeVitto says. "Many members of the community are immunocompromised and often couldn't attend the in-person event because they were undergoing treatment."

#### **Closing the Distance Gap**

For the American College of Osteopathic Family Physicians (ACOFP), pivoting to a virtual event enabled many member physicians who live in rural areas and are challenged with transportation issues to participate.

"We tapped into a segment of our membership that had never come to our programs before," says ACOFP Executive Director Bob Moore, MA, CAE. "We learned that a lot of our attendees had never traveled to the in-person event due to transportation issues, including living far from airports."

ACOFP's 2019 in-person program had 1,819 attendees. In 2020, ACOFP's virtual program, which included both "live" and on-demand registration, reached 2,086. This year, registration swelled to 2,804.

While Moore is still talking with his team about the exact look of the next conference, the plan for

now is to offer a hybrid event. "We knew in March 2020 there was no going back — we would have to provide both an in-person and a virtual conference, so we would not alienate an important side of our membership," Moore says.

#### Sponsor Impact

Some associations have already begun to see their relationships with sponsors strengthen in terms of revenue and engagement, while others are looking ahead at how to leverage the expanded reach with sponsors.

For ABTA, the last in-person event in 2019 resulted in 17 sponsors generating \$45,750 in revenue. In 2021, 27 sponsors generated \$179,750 in revenue.



ABTA's last in-person event in 2019 resulted in 17 sponsors generating \$45,750 in revenue. In 2021, **27 sponsors generated \$179,750** in revenue.

ABTA leaders were concerned their sponsors would not find value in virtual meetings. "Our team came together, and we thought about it through the lens of the sponsor," DeVitto says. "We had to think, 'how do we continue to get eyeballs on our sponsors?' So, we wove the sponsors into sessions."

Many of ABTA's sponsors include biotech companies showcasing breakthrough treatments and research. Navicure, for instance, showcased a device in 2019 and still returned as a sponsor in 2021. "Many sponsors missed the in-person event but realized the added number of people [at the virtual event] meant being exposed to a much broader audience," he says.

Association leaders are looking ahead and anticipating how the expanded reach will benefit sponsors and generate revenue for the association. However, leaders recognize the need to create and encourage interactive engagement.

Sponsoring association meetings is a primary tactic for Procter & Gamble (P&G) to reach one of its target audiences, dental professionals. "Although the reach can be better for virtual meetings, we tend to get lower foot traffic at virtual booths," says Beth Jordan, RDH, MS, Procter & Gamble Professional

#### **HYBRID HURDLES**

Verizon's meeting platform, BlueJeans, commissioned a study in March about how organizations can optimize for a future that's dominated by virtual and hybrid events. The study asked marketers about their pain points and successes in making the switch to virtual or hybrid events.

The report found that two-thirds of marketers say their firms are struggling to achieve the same success from virtual events that they would from in-person events. Yet, more than 80% said that they could achieve the same or greater success if they made improvements to their strategies. Below are some findings from the report.

#### Challenges with hosting virtual/hybrid events

71% said it was very challenging to make virtual/ hybrid events resemble all the interactive, human-to-human elements of an on-site event.

> 67<sup>%</sup> of marketers said it was very challenging to bring products, services and stories to life in a compelling format on digital event platforms.

64% of marketers said it is very challenging to effectively isolate the most engaged leads to improve sales performance after the event.

#### **Opportunities for virtual/hybrid events**

- Greater flexibility for audience to attend multiple sessions.
- > Better event analytics.
- Increased attendance/reaching a segment of attendees who are unable to travel.
- > Better pre-event planning.
- > Deeper social networking among attendees.
- > Easier post-event follow-up engagement.
- > More breakout sessions.

#### To read the full report, visit **bluejeans.com/resources/** analyst-report/virtual-events-opportunity-snapshot.

& Scientific Relations. "Unfortunately, there is limited human interaction taking place, minimizing our ability to build relationships."

According to Jordan, P&-G partners with associations to find creative solutions to engage with members at virtual events. "Our goal is to get to a place where we get the same amount of support as in-person events," she says. "We want our partner associations to know that we



CANDICE WARLTIER

FOUNDING PARTNER, CS-EFFECT

want to support them, but we need to see the ROI."

Associations that have reached out to P&G to brainstorm on a joint business plan have been able to derive the most support. The two organizations work together to identify goals, which has led to mutually beneficial outcomes that are not necessarily traditional sponsorship packages.

#### We had to think, 'how do we continue to get eyeballs on our sponsors?' So, we wove the sponsors into sessions."

– RALPH DEVITTO, PRESIDENT AND CHIEF OPERATING OFFICER, ABTA

"When we [do a] joint business plan with an association, it's important to identify mutual goals to work toward — whether it is developing educational content for members, hosting a speaker at a webinar event or authoring articles for their trade journals," Jordan says.

Technology is imperative to reaching people during these times. Procter & Gamble developed a Virtual P&G LifeLab, an interactive platform that was used for the Consumer Electronics Show. The virtual platform allowed P&G to interact with attendees via an avatar that could "walk" up to visitors, engage with them and show the visitors the products in real time.

It's uncertain if all virtual events will be revenue generators. But, with careful planning and attention to both the member and sponsor experience, your group can explore new ways to make money from events.

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### WHAT'S THE SCENARIO?

In these uncertain times, associations should have a variety of backup plans for events.



his is the most unprecedented time in the history of the event-planning industry. Over the past two years, we have gone from a booming meeting landscape to a completely virtual landscape. The times have been dominated by canceled in-person events and hybrid meeting formats that tried to balance travel restrictions and members' preferences to meet face-to-face. If nothing else, these experiences have taught us

not only the need to be nimble, but also to plan for contingencies — many contingencies. How can an association keep up with these changes? By anticipating them and working through

various scenarios. This also is where an association management company can help. By planning dozens of meetings each year, these companies have learned about the many twists and turns that an association can encounter at every stage when planning COVID-era events.

FORUM recently talked with four members of the Strategic Events Management team at Association Management Center (AMC) to get their insights about scenario planning during uncertain times. In a normal year, this team would plan more than 100 events for 30 clients. Participating in the interview were Executive Director Colleen Bagnasco, CAE, CMP; Senior Managers Stephanie Dylkiewicz, CMP, DES, and Kari Messenger, CMP, DES; and Manager Anna Gilkerson, CMP, DES.

FORUM: It seems like there are new developments daily as it relates to COVID-19. With that in mind, how often should an

#### **VISUALIZE YOUR SCENARIO PLANNING**

The decisions being made by event planners today are critically important — after all, members' health and safety depends on it. So does your organization's reputation and revenue.

One way to keep track of your options is to create a visual matrix for scenario planning. In this example, we created a simple chart with four separate scenarios to consider.

One end represents what's best for attendee and sponsor engagement while the other highlights safety. Every scenario asks how this option would look from various perspectives: your members, sponsors, risks associated, opportunities and calls for a communication plan. This is a quick way to visualize and reference all your scenarios. Share this with your team, and use it as a touchstone while talking through different aspects of the event. You can also consider a visual flowchart or an if/then diagram.

BETTER FOR ATTENDEE / SPONSOR ENGAGEMENT

#### SCENARIO A: 100% IN PERSON

Member perspective Sponsors Risks Opportunities Communication plan

#### SCENARIO B: 50% IN PERSON

Member perspective Sponsors Risks Opportunities Communication plan SCENARIO C: LESS THAN 25% IN PERSON

Member perspective Sponsors Risks Opportunities Communication plan

#### SCENARIO D: NO IN-PERSON ATTENDEES

Member perspective Sponsors Risks Opportunities Communication plan SAFETY



MIKE NORBUT

VICE PRESIDENT OF BUSINESS DEVELOPMENT, ASSOCIATION MANAGEMENT CENTER

#### organization update its scenario planning and potential strategies for an upcoming meeting?

AMC: Early and often. While COVID-19 has had an effect on events on a much larger scale and the environment continues to change, scenario planning and strategies should always be at the foundation for any organization's events. If anything, COVID-19 has brought this to the forefront for many organizations; hopefully this will have a lasting impact to allow them to be more agile and plan for various scenarios in the future.

There should be an initial plan with alternative scenarios, and all should be revisited on an ongoing basis. The timing for each event will drive how often updates need to be made, but revisiting and updating the strategies should be built into the overall project plan along with key dates for when decisions will be made to provide direction in the planning.

With regard to the host city, regular communication between the Convention and Visitors Bureau (CVB), hotel(s), convention center, production company, etc., is critical to ensure everyone is in sync with mandates, guidelines, and health and safety protocols. As planners, we need to set clear expectations and run through scenarios, so all involved not only know their role but also have the ability to weigh in with different perspectives. Local stakeholders may surface additional situations you haven't even considered. It takes a village.

#### FORUM: How many scenarios do you need to plan for, and how does this impact contract negotiations?

**AMC:** Not to give an attorney's response, but it depends. At a minimum, we are creating two or

ANNA GILKERSON. CMP, DES

MANAGER



COLLEEN BAGNASCO. CAE. CMP

EXECUTIVE DIRECTOR



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SENIOR MANAGER



STEPHANIE DYLKIEWICZ. CMP. DES

SENIOR MANAGER

three scenarios to help an organization decide whether to move forward with an in-person, hybrid or virtual conference. It's critical to look both inward and outward when gathering data to make an informed decision.

There are so many factors to consider: budget scenarios, registration trends and attendee demographics, travel restrictions, and potential mandates and legislation, just to name a few. It's also important to consider the organization's reputational risk: What are the trade-offs of shifting from one format to another? What might happen if you have to cancel? If you stay in regular communication with the local CVB, hotel and convention center partners, you should be able to stay ahead of some of these factors, especially travel restrictions and mandates. Monitoring other industry events in your location can also help you stay apprised of staffing and service levels in your partner cities. This isn't rocket science, but it certainly is challenging.

When negotiating a contract for an event, including terms that allow for the greatest flexibility in these uncertain times is advantageous to the organization. Building in review clauses and flexible performance terms will allow the organization to consider additional scenarios, such as moving forward with an event at reduced capacity or postponing the event to a future year. The lack of flexible contract terms can have a negative impact, limiting the potential scenarios an organization may want to consider.

#### FORUM: During these uncertain times, what are the "certainties" around which you can build your meeting strategy and scenarios?

**AMC:** It's certain that your strategy and scenarios will continue to shift and evolve. But any event should

always tie back to your organization's mission, goals, objectives, stakeholder need and financial impact while ensuring the health and safety of all attendees. If your event stays true to the mission of your association and the needs of your members, you will achieve your goals of advancing their education and networking opportunities. The format is really just the vehicle to deliver your content. It's imperative to stay informed and look forward with judicious optimism.

MIKE NORBUT IS VICE PRESIDENT OF BUSINESS DEVELOPMENT, ASSOCIA-TION MANAGEMENT CENTER.


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#### IN THE KNOW

## NEWS

## **ISAE Chapter**

It's been one year since Association Forum welcomed the Illinois Society of Association Executives (ISAE) as an independent chapter. In that time, ISAE's 400+ members have gained access to Association Forum's resources, and we've benefited from the new perspectives these members lend.

Association Forum held events in Springfield, Illinois, for ISAE chapter members in July and October. This was the first in-person event brought to Springfield — and a huge success.

"By working together with Forum, we are bringing the Illinois association community together like never before," says Bryan Soady, CAE, ISAE president and executive director of the Illinois Alliance of Boys and Girls Clubs. "We're excited about the possibilities for enhanced education, improved experience and a stronger voice at the Capitol."



#### New Business Model

Association Forum engaged THRUUE to reimagine our business model one year ago. Our board and former CEO and President Michelle



Mason, FASAE, CAE, had already raised concerns over the organization's revenue relying so heavily on the hospitality and destination industries. That reliance became unsustainable due to COVID-19.

The board sprang into action and reimagined the organization's business model. With thoughtful guidance from THRUUE, the team came up with a novel approach. This model involves a shift in thinking and operation, four verticals and a plan to diversify revenue streams.

Now, under the leadership of Interim CEO Suzanne Berry, MBA, CAE, and with Paul Pomerantz, FASAE, CAE, as chair of the board, we have begun implementing the new model. Be on the lookout for more info regarding these changes and a full narrative of what it took to get here.

#### Meet Safely at Association Forum's Headquarters

If you need a safe and clean space to meet, consider Association Forum's conference and room rentals — with views of the Chicago River.

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### Scenes from Honors Gala 2021

David J Babb

## **CEO Search Update**



Michelle Mason, FASAE, CAE, announced in June that she would be leaving Association Forum to become CEO of the American Society of Association Executives. Mason had led Association Forum since 2014.

Suzanne Berry, MBA, CAE, began her role as interim CEO in August. Currently, the board is leading a search for the new president and CEO with the help of Tuft & Associates and Association Strategies. We are looking forward to working with these firms on this incredibly important initiative. "Their focus on DE&I aligns with Association Forum's Welcoming Environment<sup>®</sup> strategy and will help us make the best, most inclusive selection for Association Forum," says Paul Pomerantz, FASAE, CAE, Association Forum Board chair.

In September, the board announced a search committee. Stay tuned for more information on the ongoing search.

#### **FORUM's Digital Push**

Have you missed reading this magazine? That may be because in June of this year, *FORUM* magazine went digital. Association Forum has posted magazine content online for years, but this year the publication



transitioned to a mostly digital format, with just one printed copy a year (consider it a special edition for Holiday Showcase).

The transformation has been well received so far. This year, the magazine website has garnered more than 10,000 visits. We post new articles weekly and each month's content centers around a theme. You can also find updates from the organization and press releases on the magazine website. If you can't check the site each week, be on the lookout for our monthly email that highlights the latest articles.

What's everyone reading? Teresa Brinati, director of publishing at the Society of American Archivists, wrote a piece called "The New Leadership Model" back in April. This well-researched article focuses on authentic and empathetic leadership, with special consideration to the pandemic. Brinati's article is this year's most-read with more than 1,200 views.

Another hit article was Mahjeda Ali's "Sorry for the Background Noise." A senior awards program specialist at IEEE, Ali shared her story of coming back from maternity leave to a world in lockdown and working from home with an infant. Ali's story is poignant, relatable and highlights critical flaws in society's treatment of working parents.

**HEAD OVER** to *forummagazine.org* and check out the latest articles for yourself!

ORUM

## CALENDAR

#### Upcoming Signature Events

#### Healthcare Collaborative

ADA Conference and Meeting Center Jan. 25, 2022

#### **Women's Executive Forum**

W Chicago-City Center March 2, 2022

#### SmartTech Conference

**Forum Forward** 

Venue Six10

June 21, 2022

OLC Education & Conference Center March 30, 2022

#### **Honors Gala**

Marriott Magnificent Mile June 23, 2022

#### **Association Forum's Leadership Programs**

#### Association 101

Offered twice a year in the spring and fall, this is a one-day educational program that is a perfect introduction to the association world for staff new to the industry. Visit **associationforum.org/mainsite/events/calendar** for more information.

#### **Emerging Leaders Program**

The Emerging Leaders Program highlights influential and powerful techniques that teach young professionals how to take the next steps to achieve success while creating an exclusive group where young professionals learn together over six months. Visit **associationforum.org/ events/emerging-leaders** to learn more.

#### **Executive Leaders Program**

The Executive Leaders program is a six-month education and networking program for leaders who are looking to advance in the association industry. Executive leaders will participate in a series of learning modules to help them find their strengths in their current roles before formalizing a plan for their desired career trajectory. For more information, visit **associationforum.org/events/exec-leaders**.

#### Forty Under 40 Program

The Forty Under 40 program is a prestigious competition that provides recognition to 40 accomplished association or nonprofit professionals who are under the age of 40, demonstrate high potential for continued success in leadership roles and exhibit a strong passion for — and commitment to — the association management and nonprofit industries. Visit **associationforum.org/ aboutaf/fortyunder40** for more information.

#### **CEO's Kitchen Cabinet**

This is the second year of the CEO's Kitchen Cabinet a unique CEO learning community focused on critical problem-solving by examining challenges and opportunities through peer-to-peer engagement. The focus of this year's cohort of 20 association CEOs is on moving from crisis to recovery. Email **exectiveoffice@associationforum.org** for more information.



Association Forum live webinars are



Visit associationforum. org/events to register

for upcoming webinars.

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

#### WHEN IT COMES TO HEALTHY MEETINGS, ORLANDO CONTINUES TO SHINE

Orlando is leading the way with the industry's recovery by continuing to do what we do best—hosting incredible meetings. In fact, we've hosted over 100 events this year at our award-winning Orange County Convention Center alone. Which was the first convention center to earn Global Biorisk Advisory Council® STAR<sup>™</sup> reaccreditation. And we've done so with groundbreaking innovations, like partnering with Orlando Health to provide groups with a first-of-its-kind medical concierge program. New hotels, dining and entertainment all work together to continue to enhance amazing. It's time to rediscover Orlando!

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## ASSOCIATION FORUM'S FORTY UNDER 40 AWARDS

CONGRATULATIONS TO ALL WHO HAVE BEEN RECOGNIZED THIS YEAR!

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## PARTNERS MAKE IT POSSIBLE

#### **Discover Atlanta**

Atlanta Convention and Visitors Bureau 233 Peachtree Street, NE, Suite 1400 Atlanta, GA 30303



#### discoveratlanta.com

Atlanta offers an unparalleled experience as one of the top convention cities in the country. There are many reasons why the destination is a great place for meetings, including its walkable downtown convention and entertainment district, unrivaled accessibility via the Hartsfield-Jackson Atlanta International Airport, show-stopping new developments and upgrades, nearly 107,000 hotel rooms in the metro region, vibrant neighborhoods filled with cultural experiences, nationally acclaimed food and more — all of which contributes to why Atlanta is on a different level.

Home to the largest combined convention, sports and entertainment campus in North America, Atlanta continues to evolve meetings with each transformation to the downtown convention campus. Georgia World Congress Center, the first U.S. convention center to achieve GBAC STAR accreditation and the world's largest LEED-certified convention center, hosts some of the country's largest shows with more than 1.5 million square feet of prime exhibit space. Plus, an array of hotel properties provides nearly 12,700 guest rooms. This number will grow with the anticipated 975-room Signia by Hilton Atlanta expected to welcome conventioneers in late 2023.

The Atlanta Convention & Visitors Bureau staff will be with you every step of the way once you book your meeting in Atlanta and work in concert with the city's hotels, venues, restaurants, attractions and ambassadors to create a seamless meeting experience. Now is the time to start planning your event in Atlanta. Visit **discoveratlantameetings.com** to learn why Atlanta is the perfect choice to host your next meeting.

#### **Destination Vancouver**

#### Lacy Hawley

Manager, Meeting & Convention Sales, US 200 Burrard Street, Suite 210 Vancouver, British Columbia V6C 3L6, Canada 604-631-2805



#### Ihawley@destinationvancouver.com destinationvancouver.com

A world-class city nestled in nature that stretches minds and muscles: There's something special about Vancouver that will inspire you to see things differently. And you'll feel it as soon as you arrive. Maybe it's the snow-capped mountains, the urban rainforest or the reflection of the Pacific Ocean on our cosmopolitan skyline — whatever it is, it inspires people to leave with a totally different perspective than the one they arrived with.

If all of that sounds inspirational, it's because it is. Vancouver is a natural incubator, a hotbed for entrepreneurialism where you'll meet pioneering minds that are as invigorating as the mountains they're surrounded by. As one of the top-25 best startup ecosystems in the world, we attract thought leaders from across the globe. But it's not just innovation that draws them here, it's also our inclusivity. Whether it's to Mother Nature or each other, connectivity is at our core. Maybe that's what makes this place so welcoming — the only way to find out is to experience it for yourself.

#### eShow Event Management Solutions

Jimmy Mouton SVP, Sales and Marketing 5 Executive Court, Suite 2 South Barrington, IL 60010 847-620-4200



#### jimmy.mouton@goeshow.com goeshow.com

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#### Louisville Tourism

David Kinney Director of Midwest Sales 401 West Main Street, Suite 2300 Louisville, KY 40202 502-379-6105



#### dkinney@gotolouisville.com gotolouisville.com

Louisville has steadily become one of the hottest destinations in the U.S. Booming bourbon renaissance, culinary jewels, one-of-a-kind attractions — the city offers a menu of things to see and do all wrapped within its hallmark Southern charm. Urban distilleries, burgeoning neighborhoods, classic cocktail bars, great places to eat and iconic attractions and events make Louisville a top destination. Not to mention. Louisville has been revitalized with a \$1 billion investment in tourism infrastructure. The downtown convention center re-opened in 2018 after a major renovation and expansion and is now GBAC STAR accredited along with the 1.2 million square-foot Kentucky Exposition Center adjacent to the airport. Louisville has also seen the opening of more than 1,000 new hotel rooms in the past 18 months, bringing the downtown hotel inventory to a convention-attractive 6,300 rooms. The Urban Bourbon experience that saw Louisville's first distillery with a visitor component open in 2013 is now over a dozen strong with growing options to take part in the complete culture and heritage around American's native spirit in its birthplace. With all of this, it's no wonder Forbes named Louisville one of the "10 Coolest Cities to Visit" and Smart Meetings said it was one of "11 U.S. Cities on the Rise You Can't Pass Up."

#### PCMA

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PCMA educates, inspires and listens, creating meaningful experiences where passion, purpose and commerce come together. We are the world's largest community for Business Events Strategists, providing senior-level education, networking and market intelligence for the global business events industry. Our mission is to drive social and economic progress through business events.

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Vetted Solutions is a retained, national executive search firm specializing in fulfilling the leadership needs of trade associations, professional societies and nonprofit organizations. In addition to providing solutions for CEO, other C-suite and director needs, our firm has a deep pool of interim senior staff and CEO talent. Our team is focused on delivering a highly customized approach to executive search. We get to know our clients thoroughly to present candidates who fit your culture in addition to being the best at what they do. As a result, your new hire will provide lasting leadership that drives significant, sustained results.

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VISIT

#### Visit Seattle

Visit Seattle Conventions Team 701 Pike St, Suite 800 Seattle, WA 98101 206-461-5800

conventions@visitseattle.org visitseattle.org/meetings

Located in the heart of Seattle, a city resonating with innovative minds and a vibrant arts scene, the Washington State Convention Center is amidst a transformative project, building a significant addition to accommodate the expansive interest in the city. Just a block and a half away from the existing building, Arch, the Summit building is set to open mid-2022 and will blend uniquely local experiences with awe-inspiring meeting spaces.

It's not just the Washington State Convention Center that's growing. Downtown Seattle hotel supply increased by almost 25% between 2018 and 2020, bolstering an already outstanding hotel package. Seattle's wide-ranging brand options mean you can find the perfect match for your group's specific needs, all within easy walking distance of restaurants, shops and attractions.

While we are all navigating this uncertain time, our Seattle team is focused on the future and ready to work with you, finding creative solutions to make your meetings a success in whatever form they take.

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# 2021 CORTY 40 AWARD RECIPIENTS

ASSOCIATION FORUM IS PLEASED TO CONGRATULATE THE ASSOCIATION COMMUNITY'S FORTY MOST ACCOMPLISHED PROFESSIONALS UNDER THE AGE OF 40 FOR 2021.

**Sara Albert-Hussey,** MBA, CAE Vice President–Member Experience Pennsylvania Institute of CPAs

**Eduardo Arabu** *Executive Director* National Hispanic Corporate Council

**Nicholas Bailey** *Online Education Manager* California Water Environment Association

Kara Bastarache, CAE Program Manager, Engagement & Special Programs American College of Rheumatology

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

Lori Barker Cummings Senior Account Executive Kellen Company

Alexis Curtis, MBA, CMP, CAE Manager, Volunteers and Meetings American Dental Association

**Konstandina Dulu,** MA Manager, Grants and Awards American College of Chest Physicians **Nick Estrada,** CAE, CMP *Director of Membership* Raybourn Group International

Jamie Garcia, MS, CMP Senior Manager, Meetings & Events Emergency Nurses Association

**Stacey Gardner,** CAE Director of Education Eye Bank Association of America

Jay Gilbert, PhD Director, Scientific Programs & Career Pathways Institute of Food Technologists

**Deepa Gudipally,** MS, CAE Application Development Manager American Society of Anesthesiologists

Samyuktha Gumidyala, MPH State Associations Relations Manager II American Association of Nurse Anesthetists

Naomi Hattori Acting Vice President, Global Development Choose Chicago

**Colleen Jamieson** *Executive Vice President* Innovatis Group



## FORUM

Haley Jones, CAE Senior Manager, Member Engagement American Staffing Association

**Dana Karstensen,** MBA, IOM, CAE Data Governance Product Manager American Society of Anesthesiologists

**Tori Miller Liu,** MBA, CAE *Director of Information Systems* American Speech-Language-Hearing Association

Marissa Lopez, CAE Executive Director Executive Director Incorporated

Ashley MacDermott, MPH, CHES Senior Education Manager Meeting Expectations

**Erin Mahrt,** JD State Affairs Manager American Society of Anesthesiologists

Katherine Matthews, CAE Manager, Data & Analytics National Council of Architectural Registration Boards

#### Molly S Mazuk Director, Professional Development American Society of Addiction Medicine

**Erin Menet,** MBA, CAE, DES *Director, Governance and Leadership Programs* CCIM Institute

Jacqueline Teresa Meracle, MBA, CAE, CMP, DES Manager, Chapter Engagement PCMA

Justin Bradley Reyes Director of Business Development ABC Heart of America

Eboni Russell State Association Advocacy Manager National Association of Convenience Stores (NACS) **JenaShay Russell,** MPA, MPS, CAE *Director of Regions* SmithBucklin

**Shawn Sanford,** CAE Manager, Member Engagement American Academy of Physical Medicine and Rehabilitation

Katie Schmitz Scott, CAE

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Amber P. Simpson Director, Membership American Academy of Orthopaedic Surgeons

**Thomas Southard** *Chief Operating Officer* Conference of Major Superiors of Men

**Emily P. Stephens,** CMP, DES Meetings and Special Projects Manager American College of Osteopathic Family Physicians

Jennifer Varhalla, MBA Manager, Professional Development American Association of Nurse Anesthesiology

Nathan Wambold, CMP, DES Director, Meetings & Conferences American Anthropological Association

Michelle Whitworth, CMP, DES Manager Association Management Center

Nicholas Williams Psychometrician American Osteopathic Association

Karen Williams, CAE International Professional Development Administrator Society of Actuaries

**Stacey Williams**  *Program Director, Certification and Education* Turnaround Management Association

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## What are you most looking forward to in 2022?

I am looking forward to having more in-person networking events where people are able to safely gather indoors on a regular basis. On a personal level, I'm also looking forward to



taking the big overseas family trip we put on hold in 2020 and being able to attend more baseball games surrounded by lots of fans.

 — Norma G. Castrejon, CAE, senior technology consultant, DelCor I am looking forward, first and foremost, to a return to some level of normalcy. In addition to that, I look forward to some face-to-face meetings where I have an opportunity to network with my peers and

friends who I have not seen in person for more than a year. I am hopeful that opportunities for professional development will increase and that I will be able to get out and enjoy myself on a personal level without so much fear and anxiety. I am also looking forward to family gatherings for the holidays and in-person allstaff meetings as well — I must admit that I miss those. To summarize, I am looking forward to hope and optimism.



— Lannisa James, MBA, MHRM, certification operations and LMS support manager, customer relations, American Health Information Management Association



I am looking forward to a full return to in-person live events, as event organizers and attendees crave faceto-face connection. I am also very curious and excited to see how event organizers are leveraging all the new event data they've been presented with the last two years. Lastly, I am most excited for seeing how the meeting professional role changes even more we're wearing more hats than ever, and I'm excited for a larger seat at the organizational table.

— Emily Thompson, CMP, DES, meetings and events planner, American Epilepsy Society

I am very optimistic and hopeful that in 2022 we can start traveling more both for pleasure and business. Catching up with friends, family and volunteers in person is going to be such an incredible feeling. I'm looking forward to watching my son, Miles, continue to grow up! He'll be turning 3 in July, and I'm incredibly curious to see how his personality (and mischief) grows.



- Joe Lindahl, MA, CAE, account executive, Association Management Center



I absolutely love Chicago. It's a city I chose to live in after spending a lifetime in New York City, and it's the city where I married the love of my life. I'm most looking forward to spending more time in the city, more time connecting with my awesome staff and more face time with our association members.

— Scott Y. Stuart, Esq., CEO, Turnaround Management Association



## ONDIF AFERLE ENTVEL

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