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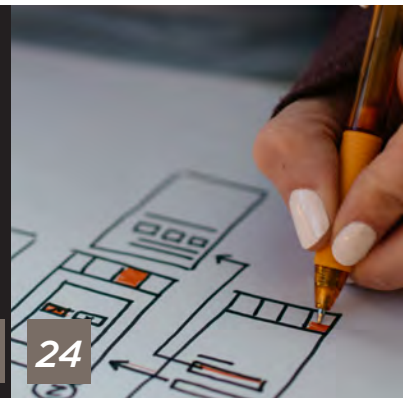
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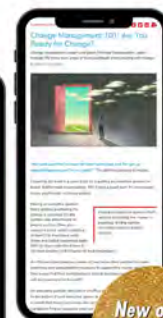
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### FORUM (ISSN 1050-0092)

is published once a year by  
Association Forum, 10 South  
Riverside Plaza, Suite 800,  
Chicago, IL 60606.

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ARTESHA MOORE, FASAE, CAE

PRESIDENT & CEO  
ASSOCIATION FORUM

## I Am Honored to Serve You, So Here's the Plan

The rumble of an L train overhead. The cool lakefront wind on a hot summer day. The boats passing in the river just below Association Forum's office. That first bite of deep-dish pizza. A fresh Italian ice. Chicago is truly a beautiful city bursting with diverse and rich experiences. I moved here from the DC area nine months ago, and it's been a joy to immerse myself in these experiences.

My favorite experience since I moved to Chicago? Serving this great organization and plugging into a vibrant and dynamic association community. I am both amazed and humbled by the opportunity.

"Listen. Learn. And then you can lead." That was the advice of Cie Armsted, MPA, DBA, Director of Diversity at the American College of Surgeons. I took Cie's words to heart and I've been on a listening tour these past nine months. I've heard how Association Forum has impacted the career journeys countless leaders. I've been inspired and energized each time I meet another member who feels a deep connection to this organization.

Association Forum hired me to bring the new business strategy to life. That strategy consists of three main pillars—community, content, and consultation. But what does this mean for you, our members?

It means investing in developing content, events, and opportunities to empower leaders at every career stage. Whether you're a CEO, middle management, or a functional expert, we want our education to be the spark that ignites your best work yet.

It means telling powerful stories of current and emerging leaders within our community and making way for the next generation of association leadership.

**Below: I speak with fellow attendees during a session at Forum Forward in June of this year.**





## Association Forum wants to help you transform. How? We're focusing on four core areas:

1. Using learning and content to help you find solutions to solve problems within your current work;
2. Leveraging networking to help you find the support needed to navigate the ever-changing landscape of association business;
3. Elevating your career through credentials and volunteerism;
4. Helping you move through your career journey and achieve your own personal grand purpose.

How great is my job? I am excited to lead Association Forum as we begin to transform this organization, and ultimately, help you transform yourself too. Though we are at the very beginning of this journey, I am proud of the foundational work that the Board of Directors, committee leaders, and Association Forum staff have done this year.

## Here are some highlights:


- Approved changes to our bylaws to create more equity for our consulting members by creating a new Supporting Member category, which gives consultants an opportunity to serve the Forum in new ways.
- Invested funding to enhance Association Forum signature events and create unique learning experiences.
- Invested in organizational infrastructure to help deliver higher quality, higher valued content and experiences.
- Revamped our partnership program to add more win-win-win-win opportunities that better align with everyone's long-term goals and visions for the industry.
- Worked with the WE Committee to create new focus and call to action for the association community to create a sense of belonging and empowerment.
- Partnered with non-traditional organizations and partners such as universities, identity-based groups, and other non-profit organizations to provide access to new thought leaders and resources to better support our members.



**Above: Here I am at September's Summit on Welcoming Environment, posing with colleague and friend, Jacqueline Price Osafo, MBA, CAE, executive director of the Society of American Archivists (SAA).**

As we look ahead to the future, we need you! I believe that every single member has something to contribute. Whether you're just starting your career and learning the ropes, or you've been doing this since memberships were sent through the U.S. mail, we want your insights. Association Forum is only as strong as the community we serve, and you are a key part of that community.

Make the decision to invest in yourself in the new year. If you haven't done so already, this is a great time to renew your membership. If you really want to level up, resolve to volunteer with us! That could mean serving on a committee, taking part in our shared interest groups (SIGs), or writing an article for our magazine. The future of Association Forum is now! Your voice and your experience matter.

I look forward to seeing you in the new year. Whether it's at an event, a Forum After Dark, or on a Zoom meeting, be sure to say hello! I am committed to making this organization the best it can be, and I want you to be a part of that. In the meantime, I'll be soaking up this big, beautiful city! 



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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 benefician al entorno y a la sociedad.

# ***AGILITY & ASSOCIATIONS***

*By: Kim Kelly, CAE*

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Agility is More than a Sexy Business Term, and it's Shifting the Business Paradigm.





**A**gile organizations are outpacing and out-earning those that adhere to traditional business models. “When pressure is applied, the agile organization reacts by being more than just robust; performance actually improves as more pressure is exerted,” reads a 2018 report by McKinsey & Company entitled “The five trademarks of agile organizations.”

The findings are incredible, considering the amount of pressure that’s been applied to all organizations over the past few years. But what does it mean for an organization to be agile? Where has all the buzz over agility come from and how can it be applied to mission-based work?

Agility refers to organizations that can quickly and efficiently respond to disruption, but the term has deep roots in the tech industry. Born out of Agile Development, a movement in software engineering, agility revolved around people-centered cultures, rapid learning, and fast decisions cycles. This business model stands in stark contrast to traditional organizational design, what McKinsey calls “static, siloed, structural hierarchy.”

For most of the 20th Century, hierarchal business structures were status quo and meant to optimize labor, quality control, and project management. Businesses were run like machines, with top-down management and the assumption that employees needed to be told what to do so that the organization didn’t descend into chaos. This is what many refer to as The Management Century.

Today, many organizations still operate with a structure leftover from The Management Century. But discontent with this model has been brewing for some time. As technology leapt forward and a digital age was ushered in, workers and leaders alike became uneasy in the hierarchal and stoic system of old.

## How Software Developers Challenged the Organizational Paradigm

**“Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.”**

*-PRINCIPLE #1, AGILE MANIFESTO*

In the mid-1990s, software professionals had become frustrated with the development process. Many developers felt micro-managed and constrained by the rules and red tape that govern a linear model for product development (i.e., organizational machines). By 2001, 17 professionals met in Utah to find an alternative approach to

the existing model and founded the Agile Alliance. They wrote a manifesto and today Agile Methodology is widely used in the tech industry.

“The easiest way to think about it is to look at what it replaced, which was really detailed specification documents that went into a ton of detail to plan out exactly what you’re going to build, and then you would build it, and then you would test it, and then you would get into production and eventually you would get feedback on whether people liked it or not and if it was useful,” says Dan Langevin, Co-Founder and Chief Technology Officer at Ideon, a software company in the healthcare technology space.

The problem with the old model, Langevin explains, is that it’s extremely expensive to build software and sometimes you get to the feedback stage and realize you built the wrong thing. “The idea behind Agile is that you should build the smallest possible thing that you can and put the least amount of effort that you can to get it into the hands of users and start the feedback cycle,” he says.

Langevin explains that the ethos of Agile Development is hypothesis testing and incremental learning. “I think it started with software because it’s very hard as a user to imagine what interacting with it is going to be like without touching it,” he says. He goes on to explain that the area of software design is uncharted territory. “You could kind of build anything and you don’t know whether it will work in the end or not,” he adds.

So, if you are building products never before seen or even imagined by users and you’re not sure if the features will be viable, how do you proceed? In Agile, you build what’s called the minimal viable product (MVP) and you test it. You gather feedback, you hypothesize some more, you build some more, and you test it again.

“If I had to boil down Agile to one thing,” Langevin says, “it’s really that you should think of everything you do as an experiment and try to prove, or disprove your hypothesis and gather data.” When asked about non-development areas of Ideon’s business, Langevin says Agile still comes into play. Ideon’s marketing team tests campaigns, gathers data, and adjusts strategy. Ideon also incorporates scrum ceremonies (an Agile term) into other teams. These include retrospectives, in which the team gathers at the end of a cycle and talks about what went well and what didn’t go well and develop action items to improve the process for the next time around.

Langevin says he believes that the core idea behind Agile Methodology, experimentation and incremental learning, can be applied to virtually any business. “I think that it’s applicable really anywhere. And then how you implement it is going to be pretty different depending on what you’re trying to actually achieve,” he says.

So, how do you implement elements of Agile Methodology if you’re doing mission-based work?

## Mission-based Organizations Strive for Agility

**“Welcome changing requirements, even late in development. Agile processes harness change for the customer’s competitive advantage.”**

*-PRINCIPLE #2, AGILE MANIFESTO*

Tim Hopkins absolutely believes associations can be agile. Hopkins is a practice director at McKinley Advisors and co-led a pre-conference session at the 2022 ASAE Annual Meeting & Exposition titled “The Agile Association Master Class”. The three-hour workshop drew from Agile Methodology and used real association examples to guide participants through the nuances of becoming an agile organization.

“I call it uppercase ‘A’ Agile,” says Tim Hopkins. He’s referring to the official methodology deployed by businesses such as Ideon. “You don’t necessarily have to hire outside people to be more lowercase ‘a’ agile,” he says, adding “it’s a trait, not a methodology.”

While Hopkins notes that an organization doesn’t need to hire outside help to start incorporating agile methodologies, it is certainly part of what he does at McKinley Advisors. Before he consulted on using agile in association work, he was an association professional trying to find ways to get results.

Hopkins became interested in Agile while leading the digital center and diversity, equity, and inclusion efforts for the International Association of Fire Chiefs (IAFC). He wanted to measure outcomes rather than outputs. The organization was doing all sorts of things to promote diversity, but they needed to measure the right things to see if their programs were affecting outcomes. Was the organization actually becoming more diverse? This desire to measure outcomes led him to objectives and key results, or OKRs.

“OKRs are a superpower,” Hopkins says. He sees OKRs as a way associations can start to pull the principles of Agile into the fabric of their organizations. Not only is this way of thinking integral for measuring impact, but it also promotes efficiency. If your outputs are not influencing desired outcomes, you can shift resources to areas that are more effective.

Hopkins also talks about MVPs, the minimal viable product that Langevin uses with his development teams. While most associations aren’t deploying products (events, education, content, etc.) at the same rate a software development company might, the MVP can still help hone features and member satisfaction.





Plus, Hopkins sees another use for the MVP. If this is your first time dipping a toe into the waters of Agile, you may be thinking this all sounds great, but you'll never get your team on board for myriad reasons. Hopkins suggests executing an MVP as a test of the methodology.

"Come up with a concept, a theory; something you feel comfortable enough to run with given the level of support you have in an organization," he says. He notes that one of the things that holds people back is a lack of psychological support for trying new things. The idea behind Agile is rapid learning, which will require room to fail and learn from those failures. "If your hypothesis turns out not to be true, it can be a good thing," Hopkins says, adding, "You did it at a measurable scale, risk was mitigated. Yes, it failed by way of definition. However, you learned something so valuable that the next version will be better for it."

## The Culture of Agility

**"Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done."**

*PRINCIPLE #5, AGILE MANIFESTO*

First, work moved to a much more remote model following the COVID-19 pandemic, and now Agile Methodology demands that leaders also trust employees to get the job done. Both ideas fly in the face of the old paradigm. The Management Century mandated work be done in offices, in business clothes, and that managers tell subordinates how to do it. While this may be an oversimplification, we've all seen enough org charts to know that the hierarchical nature of business hasn't changed much, until now.

Hopkins says that people are right to push back against new methodologies, and especially buzzwords that claim to make an organization faster, stronger, and better. "I think there's nothing that shows progress better than the results of progress," he says.

In addition to building psychological safety for experimentation and potential failure, leaders who want to improve agility need to trust their people. McKinsey likens the shift in thinking of organizations as machines to thinking of them as organisms. Agile organizations are more like



organisms because they are made up of cells, or small teams of people, that can quickly adapt and be flexible with resources. But this doesn't mean that there isn't still an important leadership component to agile companies.

"The paradox that truly agile organizations master [is that] they are both stable and dynamic at the same time," the report reads. "They design stable backbone elements that evolve slowly and support dynamic capabilities that can adapt quickly to new challenges and opportunities."

The "stable backbone" the McKinsey report refers to is comprised of elements like a shared purpose and vision, cohesive community, and servant leadership. Sound familiar? Associations are already built around these elements. Furthermore, agile businesses excel due to their fierce customer focus—another trait associations know well. In this way, associations are well-poised to adapt agile traits and become more flexible and stable over time.

"Agile organizations reimagine both whom they create value for, and how they do so," the report reads. "They are intensely customer-focused, and seek to meet diverse needs across the entire customer life cycle."

If you're in an association membership department, those words couldn't ring any truer. Association Forum for example, was established in 1916. Certainly, the people Association Forum creates for have changed over the past 106 years. And our customer life cycles? Well, those can sometimes last a member's lifetime. Membership departments everywhere are constantly tweak-



ing and honing their benefits to meet members at every stage of their career.

In some ways, associations have to be agile in order to stand the test of time. If our organizations are going to last another 100 years, we need to adapt and change as quickly as the world we live in.

## A Win for Agile Governance

**“Simplicity—the art of maximizing the amount of work not done—is essential.”**

PRINCIPLE #10, AGILE MANIFESTO

Who doesn't want smoother board meetings and faster decision making? For Bryan White, executive director of the Tennis Industry Association (TIA) and Chief Growth Officer at Bostrom, reimagining TIA's board was a must.

“It was crazy,” White says, “you just had too many seats at the table, and then there was no requirement where you even needed to be a member of the association to be on the board.” At one point, the number of board seats totaled 32, making business meetings long and decision making nearly impossible.

Besides the issue with the sheer size of the board, White explained that the makeup wasn't exactly fair. The TIA represents the business of tennis, meaning there were major manufacturers paying the association six figure sums in dues but also small independent stores that only paid hundreds of dollars. Both had representation on the board. What naturally formed was a sort of two-tiered board and it just wasn't working.

After years of discussion and seeding the idea amongst current members, White got approval this past August to condense the board to 11 members with rotating terms. The group is still working on bylaws and pushing the plan through legal.

“Overall, I think this is going to streamline our decision-making process and how fast we can move on new initiatives,” says White. In essence, agility is closer than it has been before.

Several factors helped get the plan approved. White explains that the TIA's main value proposition is to be the source for data and research in the industry. They supply this research to manufacturer members, the industry at large, as well as the United States Tennis Association (USTA). Yet, the previous board structure allowed past board members (from the very large board) to push the organization towards grow the game of tennis initiatives. Not only did this take resources from their research projects, White says, but it was also duplicating efforts since growing the game of tennis is a major focus of the USTA.

“They were already doing it, and doing it better,” White says, adding, “we were trying to be everything to everyone.”

When COVID-19 forced schools and offices to close in March 2020, the tennis industry saw an opportunity. People were desperate to leave the house, so outdoor recreation saw a big surge. That's when the TIA, USTA and four other organizations formed Tennis Industry United.

**“...that's one of the things with being more agile—being able to talk about tensions, out loud, together.”**

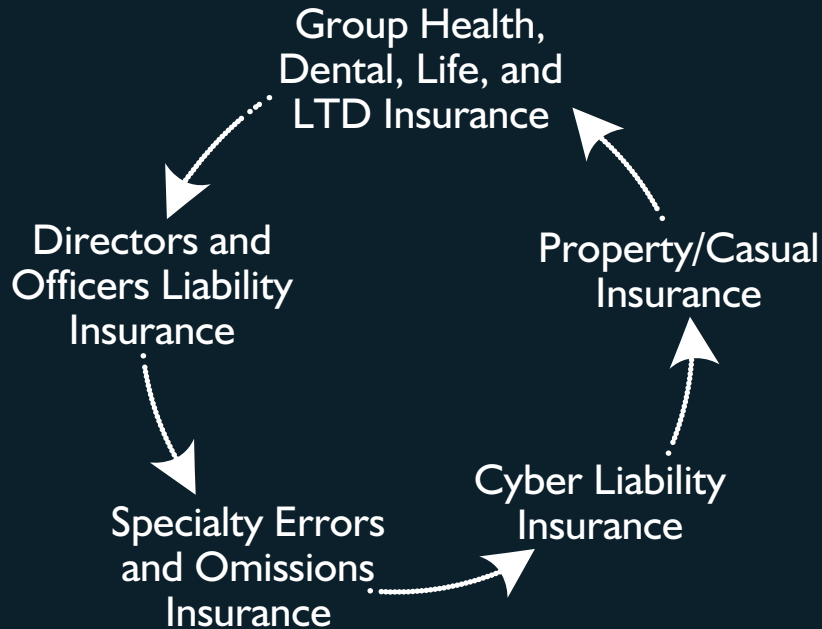
White says that the organizations were looking to collaborate and pool their resources to help grow the game of tennis. The group has taken off and evolved beyond the initial pandemic meetings. They meet monthly, have programming and communications, and even put out a joint newsletter every other week.

Not only was Tennis Industry United an excellent example of industry collaboration, but it also gave former TIA board members a place to land. The mission of Tennis Industry United aligned with some of the initiatives that deviated from TIA's



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# ANTICIPATORY ASSOCIATIONS: USING HARD TRENDS TO TURN DISRUPTION INTO OPPORTUNITIES

*By Daniel Burrus*

All associations develop strategic plans based on trends identified by their leaders. There's no shortage of trends, and as every new year begins, there are many trend lists published for the upcoming year. One of the big problems associations face is deciding which trends will happen and which ones won't.

In addition, associations depend on meetings as a major source of member benefits, growth, and revenue, and when the world of meetings is disrupted, as it was after 9/11, the recession of 2008-2009, and most recently COVID, the industry as a whole was turned upside down.

Agility helped, but the world is changing faster than we can react to it. A key strategy going forward is not only being agile (in other words, reacting as quickly as possible to a disruption or problem) — it's even more important to learn to be anticipatory. Anticipate disruptions before they disrupt and anticipate problems before you have them so those problems can be pre-solved.



## Anticipatory Associations

There are two key points I need to make to help association leaders more accurately plan for, and more importantly take advantage of, disruption and change. The first is based on 40 years of research: All trends can be put into one of two main categories. They are either Hard Trends that will happen, or Soft Trends that might happen. More on that in a minute.

The second key point is that a trend by itself is academic, with little future value. By attaching an actionable opportunity to each Hard Trend or Soft Trend, the trend will burst into actionable life.


## Hard Trends

A Hard Trend is based on a future fact that will happen, a future certainty. It is something we know is going to occur whether we want it to or not. From a planning and innovation standpoint, strategies based on uncertainty come with high levels of risk, but strategies based on certainty dramatically reduce risk and often produce superior results.



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In addition, when people are uncertain, they hesitate, they don't say yes and they don't write big checks. Instead, they develop a wait-and-see attitude, which is very dangerous in a world of technology-driven exponential change. On the other hand, when people have high levels of certainty, they have the confidence to make bold moves, to say yes and to write big checks.



A few quick examples include the future facts that many members will be retiring over the next five years and potential new younger members will have different expectations and needs. An example of a related opportunity would be to talk to younger members and potential members and find out what they would want from their association that would make it a priority to join and contribute to.

Another quick example of a Hard Trend is that meetings going forward will be a mix of in-person, virtual and hybrid. Virtual is not going away.

Part of our challenge with figuring out what the future will bring is our human default to think about new things with an “either/or” mindset: Either it's going to be live in-person or virtual; either it's going to be working from home or at the office; either it's going to be all the vendors on the show floor with their hardware or it's going to be all virtual reality. I attribute much of my ability to forecast with accuracy over nearly four decades to embracing what I call the “both/and” concept.

Here's how that concept works for associations and their events. The future is

in-person events — of course we want to be with other people; we're human beings. But on the other hand, the virtual element, the hybrid element — oh, that's there, too. There are certain meetings that would serve us well to just be virtual — there are things you can do in the digital world that you can't do in the physical world. There are things you can do in the physical world that you can't do in the virtual world. It's important for us to think through what those things are. So, if we are having a physical meeting and we do things that actually could have been done better as a virtual meeting, then why would we have the physical meeting? And if we're in-person, we should be maximizing the fact that we're physically getting together. It's important to embrace both delivery channels.

As a keynote speaker, I have given more than 3,000 in-person speeches - a few with audiences over 14,000 - and there is a magic collaborative energy that happens when humans are together with each other. They build relationships at a deeper level, not to mention buying and selling to each other.

On the other hand, I have given several hundred virtual speeches during the past few years, some in Asia and some in Europe, all in the same day. In addition, the largest virtual audience that was logged in to one of my presentations was a little over 1.1 million. Both examples would be impossible for me to do if they were in-person events.

Virtual has unique advantages in-person can't duplicate. Virtual is here to stay.

I know many meeting planners who have grown to hate virtual meetings and would like all meetings going forward to be in-person only. Instead of hating virtual meetings, let's use the certainty that comes from Hard Trends to embrace and extend and transform virtual meetings. Identify tools and develop strategies to make virtual meetings an even better member experi-

ence. I suggest seeking out tools and systems to make planning both all-virtual and hybrid meetings less difficult, less time-consuming, and less expensive — to explore how you can increase revenue and have the virtual component of a physical meeting be a profit instead of a cost to the association. I know some are already doing this, so let's learn from each other.

## Soft Trends

Opposite of Hard Trends are Soft Trends, which are based on assumptions that may or may not take place, a future possibility. In the case of Soft Trends, they can be changed to you and your association's benefit. I'll share some Soft Trend examples as I cover both below.

## More on Hard Trends

To further explore my Hard Trend Methodology and how it can help you be more anticipatory during times like we currently face, I have grouped Hard Trends into three primary categories for identification purposes.

- ♦ **Demographics.** This can be age, race, gender, or any other defining characteristic of a group. For example, there will be an increasing number of Baby Boomers retiring, and this will have a predictable impact on associations. Here is where separating Hard Trends and Soft Trends can help. As board members, past presidents and active participants retire, they will take their knowledge and wisdom with them. This statement has both types of trends, and actionable opportunities!
- ♦ **Hard Trend.** The group mentioned above will increasingly be retiring. Soft Trend: They will take their knowledge and wisdom with them. That is not a future fact! Associations can do something about this before it happens by setting up mentoring programs and creating a knowledge base based on their past insights and experiences.





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- ♦ **Government Regulations and Oversight.** As new technological innovations occur, transforming entire industries, and new problems such as new levels of cyber security risk emerge, we will continue to have new regulations. Instead of looking at all the things we don't like about new regulations, look for new opportunities. For example, there are amazing funding opportunities in all regulations, and associations can take advantage of many.
- ♦ **Technology.** We went from 4G wireless to 5G — is that it? No, the Hard Trend is that following 5G will be 6G and then 7G. Will AI continue to grow at exponential levels? Yes! The key is looking for ways to use 5G or AI or any number of new technology tools to plan meetings and new services for members.

On the near horizon, we will see virtual augmented reality glasses that look like normal glasses from companies like Apple and Samsung where you can view an overlay of data with your voice or by touching the earpiece of your glasses. What kind of data might I see? Well, I could easily see me touching the earpiece of my AR glasses and being able to see the names of all the people who are sitting in the audience. That application does not currently exist — you can't buy that technology today — but would you say that will never happen? I think you realize it's a Hard Trend, because when it comes to technology, if it can be done, it

will be done. And if you don't do it, someone else will. When it comes to applying technology to make the impossible possible, humans are great at doing just that.

For a trade show where exhibitors bring heavy equipment to the show floor, in the near future, attendees, using a virtual reality headset, will be able to see and maneuver heavy equipment that is not physically on the show floor. Does that mean people won't have to bring anything to demonstrate at convention centers? No, not at all. It means that vendors can show more than they could fit in the physical environment. This is another great example demonstrating the "Both/And" concept.

From the ever-increasing accessibility of holographic telepresence and the metaverse, technology is inevitably going to become more functional, more sophisticated and more widespread, not to mention less expensive. We will always be finding a newer, better way to accomplish a task or create something.

## Why Hard Trends Matter

Knowing that something is a future certainty means so much more in times like these. It's central to your association's planning and subsequent execution of innovation, even during a slowdown or recession.





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# 10 TIPS

TO INCORPORATE AGILE  
METHODOLOGIES INTO  
YOUR EVENT PLANNING

*By Jeanne Sheehy, MBA*

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**A**gile methodologies, born out of software development, create higher quality work with improved team morale, manage expectations from the start, and complete projects faster with better results. In a way, meeting planners are already practicing agile methods even though they might not be aware of it. Agile meeting strategies deliver cost conscious, iterative frameworks that allow you to think on your feet, adjust in real time, and put the needs of your members first.

Applying the following ten steps to your virtual and/or in-person event planning is sure to enhance outcomes and bring some order to the chaotic world of disruption and change in association management.

1. Set clear business goals that will drive everything else in the plan. These include overall revenue and expense goals, content/programming, sponsorship, exhibits, attendee engagement, attendee satisfaction, hotel pick-up, registration, virtual registration, website, email and social conversion goals for marketing effectiveness, and any education metrics such as CMEs, CEs, etc.
  2. Clearly outline roles and responsibilities of all staff, vendors, and volunteers involved in the process. As you define the goals or outcomes in the first step, build a matrix of the players that shows who is responsible for what aspect of the event (don't forget outside partners and vendors). Outline the workflow and approval process, and align all of those to desired outcomes. Make sure to share this matrix to all involved internally and externally.
- : "Applying the following ten steps to your virtual and/or in-person event planning is sure to enhance outcomes and bring some order to the chaotic world of disruption and change in association management."***
3. Decide on specific metrics that will align with the identified goals and build a data dashboard with assigned areas for team member to provide weekly updates.
  4. Set up weekly stand-up meetings to review progress, look at the dashboard, discuss challenges, and adjust as needed. You may want

to add another stand-up meeting into the mix the closer the event date comes. This can get complicated when there are a lot of players and some reside outside of the association, so this short check-in should be done with project leads who have insight into the entire meeting. They can hold their own stand-ups with their teams.



There are some specific rules that apply:

- a. 15 minutes – no one arrives late
  - b. These are planning meetings, not status meetings
  - c. Team members report on three key things:
    - i. What have you done since the last meeting to help the team meet its goal?
    - ii. What will you do this week?
    - iii. What's currently hampering your progress?
5. Use a standard agile marketing plan structure to build a flexible yet comprehensive communications approach:
- a. Goals – clearly identified business goals
  - b. Ideation – take a deeper dive into personas, customer journeys, core channel identification and creative brainstorming
  - c. The road map – campaign briefs and channels for each program area that includes a summary, expected results, expected budget and timeline
  - d. Results & reporting – identify the key metrics and reporting tools for ongoing assessment and communication



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**6.** Break the event into tasks and prioritize them. Once tasks are chosen, nothing should pull you away from those tasks until they are completed. Unless it's absolutely necessary, keep focused on the tasks you've already prioritized. Once that cycle of tasks is complete and you're back in planning mode again, assess any new tasks and readjust your priorities as needed.

**7.** Ensure there is a visual for the entire team of the dashboard and project action items with dates either on a large board with post-its or virtually using Trello, monday.com, mural, or other agile project management tool.

**8.** Build in psychological safety to construct an environment of creative thinking and innovation. During any brainstorming process in meeting

planning make sure everyone is heard, that there are no bad ideas, and everyone builds on all ideas with the "yes, and..." method. If you try something and it fails, celebrate that fail as a way to grow and learn. If others see that trying something new or out of the box gets rewarded no matter what – more ideas will flow and experimenting will be adapted with enthusiasm.

**9.** Allow for experimentation in the budget process for new things i.e., AdWords campaigns, social boosts, geo marketing, Account Based Marketing (ABM), partner promotion, etc.

**10.** Respond to change over following a plan. Make sure you are constantly looking at the data to tell you where to go next. Don't be afraid to try new things and make adjustments along the way to gain better results. [F](#)

*You can use a few or all of these on your next event and see what works well. These agile methods will allow you to create and respond to change to deliver a successful event (virtual, hybrid, or in-person) in uncertain and turbulent times. Something we've all had practice with lately!*



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### ... Continued from page 22

Leveraging Hard Trends to your advantage is how you can also pre-solve problems before they exist. Case in point: When the United States government mandated a stay-at-home order, closing the physical operations of many non-essential businesses, many threw up their hands in frustration, while others decided to adapt and overcome, taking advantage of opportunities to continue to operate during a shutdown - and profited accordingly.

For example, the Maryland Association of CPAs had everyone on staff go through my Anticipatory Organization Learning System years before the pandemic struck, so when the pandemic lockdown happened in March 2020, they anticipated the government would be making a decision about the profession of accounting. Instead of waiting to see if accounting would be

considered essential, the head of their association, Tom Hood, made the pitch to government that accounting needed to be classified as essential, and that happened.

If all you see now — given airline delays and cancellations, supply chain issues and inflation, to name a few — is crisis, I'm afraid you're not going to see the big opportunities you can take advantage of. There have never been more opportunities for associations and event planners to redefine their customer experience than there are today.

What you can expect is that Hard Trends — identified and acted upon — can offer enormous opportunities for those associations and organizations with the mindset of always keeping their opportunity antennas up and using both Hard Trend and Soft Trend opportunities to share the future today! 



#### ABOUT THE AUTHOR:

DANIEL BURRUS IS A NEW YORK TIMES BESTSELLING AUTHOR AND ONE OF

THE WORLD'S LEADING FUTURISTS ON GLOBAL TRENDS AND DISRUPTIVE INNOVATION WHO, OVER THE PAST 40 YEARS, HAS ESTABLISHED A WORLDWIDE REPUTATION FOR HIS EXCEPTIONAL RECORD OF ACCURATELY PREDICTING THE FUTURE OF TECHNOLOGY-DRIVEN CHANGE AND ITS DIRECT IMPACT ON THE BUSINESS WORLD.

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# SIX WINNING SPONSORSHIP IDEAS FOR YOUR NEXT MEETING

*By Bryn Reese*

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**A**s associations strategize about 2023-2024 conferences, the search continues for new elements that keep meetings fresh for members, build revenue, and increase return on investment for corporations. Associations and the companies that support them share one common goal: member engagement.

## Independent Review: Winning Combination

An independent review of sponsorship offerings by associations with varying membership sizes revealed tactics worth testing at your future meetings. The winning combination: member engagement = brand awareness + product immersion + the voice of industry leaders.

### 1. Use Cash as an Engagement Incentive, But Don't Stop There

The National Park and Recreation Association's meeting ([nrpa.org](http://nrpa.org)) is all about mixing business with fun on the exhibit floor for its 8,000 attendees, including playground equipment and more. Assets include a daily \$500 cash giveaway with sign-up at the sponsor's booth. Attendees must be present to win – a two-fold engagement strategy to ensure repeat booth visits.

Principal of Park Professionals Network, Scott Reese, recommends associations embrace experiences like TikTok and YouTube broadcasts. And while parking and shuttle sponsorships are tried and true, he wonders why sponsored full or discounted valet parking for event speakers, VIPS, or even volunteers are being overlooked for meetings with significant local attendance.

"As a speaker, I sometimes come to the meeting or conference just for the day, or even just for my presentation. I'm generally rushed, sometimes arriving just in time. Finding a parking space adds stress, and frequently, when I do find a space, it's distant from the speaking location, resulting in my arrival to the room with an elevated heart rate, out of breath, and in a sweat. How I would appreciate a sponsored valet and guidance to my destination."

### 2. Increase Profit Margin with No-Cost Assets

Low-cost assets increase profit margin for the bottom-line instead of chipping away at it like special convention center installations. The American Cheese Society ([cheesesociety.org](http://cheesesociety.org)), comprised of 2,300 members and prestige brands, provides their Marquee Sponsor a coveted speaking opportunity at the conference kick-off media briefing. The sponsor also received rights to serve product at a selected event, delivering high visibility and product immersion, while keeping reception costs below budget for the association.

*: Low-cost assets increase profit  
: margin for the bottom-line instead  
: of chipping away at it like special  
: convention center installations.*

### 3. Find Solutions for Lean Budgets

Free sponsorship and paid sponsorship/advertising are two avenues of sponsorship offered by COSMOPROF and COSMOPAC, the Professional Beauty Association's ([probeauty.org](http://probeauty.org)) annual B2B conferences for the beauty and cosmetic industry including beauty supply chain, reports 40,000+ beauty professional attendees from over 100 countries, and 1,435 exhibitors.

Social media exposure, a buyer program, and 1:1 matchmaking, assets that usually carry a fee to lock in, are free. This value-add makes it enticing for smaller companies, or new exhibitors, to engage in the meeting. For \$1,000 per sponsor, the boutique sampling program allows companies to distribute 1,000 free samples into the palms of attendees with logo placement at point of onsite distribution and logo in the onsite directory boutique ad.

This could be an easy "yes" for many companies with deeper inventory pockets than sponsorship budgets. Think 50 sponsors x \$1,000 = \$50,000. It all adds up to revenue success.



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Image: LMN Architects

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#### 4. Surprise and Delight Everyone

The Society for Human Resources Management which has served millions of human resource professionals over 75 years, has designed “a platform that elevates partners through experiences” (shrm.org) including one opportunity that stands out: Surprise and Delight Moments. From evening concerts by top talent, to puppies to play with in the exhibit hall, members agree the association over-delivers.

Smaller associations can achieve ah-ha moments, too. Pamela Gockerman, senior consultant for a global insurance and consulting firm, had an online conference experience she still talks about. As part of the meeting registration process, virtual attendees were asked to select from a menu of either coffee or tea for a planned coffee break. Three packages arrived before the meeting. The first included four highly curated coffees and accoutrements. The second included world class sponsor-branded items. The third featured treats to enjoy with coffee. Each built momentum for the 15-minute sponsored event.

Pamela shared, “But it was so much more. It was also about the barista who guided us through the experience. While telling his personal story, he asked attendees to forward their favorite pictures via a link. As he continued his storytelling, he unexpectedly recreated the photos in the coffee using toothpicks and edible color on a foam canvas made from cream. It was magical.”

#### 5. Recognize Significant Grants and Underwriting

Sponsorship, grants, and underwriting are often thought of as synonymous, but these are not at all the same. Therein lies opportunity. Recognizing significant foundation grants or underwriting through benefits carried into annual conferences,

inspires corporate engagement at higher levels of support.

The Foundation for Endodontics (aae.org/foundation) offers a funding opportunity to support member-led access to care projects in their communities. The program aids endodontists in providing free access to important specialty care to underserved patients within the United States. Videos were filmed at the clinics and shown, featuring the donor, at their annual meeting and otherwise online providing positive exposure for the company and the Foundation.

A second new opportunity afforded post-graduate endodontic residents presenting research at the annual meeting up to \$500 in travel reimbursement, providing them some financial assistance to attend the meeting. The corporate donor was interested in building meaningful relationships with residents.


Alyson Whittlesey, Associate Executive Director for the Foundation imparts, “Identifying needs and creating programs to directly support endodontists and the specialty, providing a meaningful

*: As he continued his storytelling, he unexpectedly recreated the photos in the coffee using toothpicks and edible color on a foam canvas made from cream. It was magical.*

opportunity for a corporate donor, and strategically furthering our mission is a win all around.”

#### 6. Individualize What Corporate Partners Want

Meaningful engagement is about creative individualization, looking at every element of your meeting in new ways through the perspective of association members, foundations, and corporate partners.

Asking stakeholder groups what they want, what they really want, identifies unique break-through asset creation, and transforms transactional engagement to genuine collaboration with generous sources of industry support. 

# MAKING AN IMPACT: HOW YOUR ORGANIZATION CAN BENEFIT HOST CITIES DURING YOUR NEXT MEETING

*By Megan Lanning, CMP, DES*



## ABOUT THE AUTHOR:

MEGAN LANNING  
IS THE DIRECTOR  
OF MEETINGS  
AND EVENTS FOR  
THE SOCIETY OF  
ACTUARIES.

**C**orporate Social Responsibility (CSR)—recently, this topic has become more visible within meetings and events industry. You'll find ample examples online with a quick search on CSR projects. But how do you create and execute your own program within your organization that relates to your core business? This is how our organization created and implemented our own CSR event program as well as some of our tips and recommendations.

Over the past 2 years, the Society of Actuaries (SOA) has incorporated corporate social responsibility as an important initiative within our meetings and events. We start our planning with learning more about our host cities and ask ourselves, "how can we connect, make an impact, and give back to the local communities?"

## **In-person involvement is not the only opportunity**

Our efforts began during the pandemic and the transition to virtual meetings. We wanted to give back to the cities where we had planned to hold our in-person meetings. Our 2020 Annual Meeting was scheduled to be held in Seattle. When we had to cancel the in-person meeting, we quickly started brainstorming ideas to keep the connection and help the city of Seattle.

In addition to the virtual experiences of the city (musical performances from Pike Place Market, yoga sessions from a local studio, glassblowing video from a local artist) we also partnered with BlackFin Coffee, a Seattle specialty coffee roasting brand whose mission is to save the endangered southern resident orcas. Attendees were provided the opportunity to learn more about the organization and its mission through customized videos, allowing for monetary donations, benefiting the PNW Protectors. A portion of the proceeds from BlackFin Coffee products were donated to the PNW Protectors as well.



*Meeting attendees came together to assemble mini garden starter kits which were donated to the Grays Ferry community.*

## The return to in-person

In 2022 we were able to return to in-person meetings and appreciated the opportunity to impact our host cities. Our Health Meeting took place in Philadelphia, PA where we partnered with the Women's Community Revitalization Project (WCRP), an organization committed to social and economic equity for low-income women and their families.

After 2 years of virtual meetings, we realized our attendees may benefit from structured networking. We thoughtfully created an activity that would connect attendees while also benefiting WCRP. Meeting attendees came together to assemble mini garden starter kits which were donated to the Grays Ferry community. The garden kits were distributed to 350 families to assist them in starting their own in-home gardens. In addition, we collected financial donations throughout the meeting, with the SOA matching contributions. The director of WCRP was our guest speaker, providing information and raising awareness of the charity's work and the communities they serve.

The 2022 SOA Life Meeting took place in Chicago. The SOA partnered with Kids Above All to host a Backpack Drive during the conference. Kids Above All offers a variety of services that places the safety, well-being, and education of kids and families above everything else, so they can build better lives.

**Continued on page 40...**

**Below: SOA meeting attendees assemble mini garden kits to benefit low-income women and their families in Philadelphia.**



## WONDERING HOW TO GET STARTED WITH YOUR OWN CSR EVENT PROGRAM? BELOW ARE SOME TIPS AND ADVICE FROM THE SOA MEETINGS TEAM.

- ♦ **Plan, plan and plan** - Whatever lead time you think you need- triple it! This is inclusive of identifying a project, securing collateral and implementation plans for onsite.
- ♦ **Be creative. In-person** isn't the only option to make an impact. Think about what kind of outreach and efforts can be accomplished virtually.
- ♦ **Define CSR as** it relates to your members and organization. CSR can mean different things to different people.
- ♦ **Define your CSR** event strategy. Research your initiatives and explore opportunities that your members are passionate about and are relevant to your organization's mission.
- ♦ **Set SMART goals.** Start small/manageable and build up. Create metrics to measure success.
- ♦ **Communicate. Get the** word out about what you are doing and start early. You will be surprised by how many people are willing to contribute once they know how they can help. This includes your own organization. Your members, attendees, and staff want to be included in the good feeling of giving back.
- ♦ **Get creative with** your budget. While you can hire external vendors to assist/manage your program, we found it to be more economical to handle internally. The additional staff time spent on each project was fulfilling and worthwhile. We also developed a "supporter program" allowing member companies an opportunity to assist with the funding efforts.
- ♦ **Stay connected with** the CSR community to continue your knowledge and development for your program and/or new ideas.

# Association Forum Pushes Forward

It's been another year with another set of challenges. This year promised to be less about masks and Covid numbers and more about reconnecting. Association Forum was able to hold more in-person events than the previous two years, but we did so with caution, and the comfort of our members at the forefront. We had a lot going on here in the Chicagoland area, but we also managed to host a pop up event in Nashville at ASAE's annual meeting.

If you're a member, we thank you! We know there are many places to invest your money and we hope that all these efforts helped you achieve your professional goals and feel like you're part of a community. Here is a summary of some of this year's highlights!



**Association Forum Staff stands proud in their "Welcoming AF" shirts at the Summit on Welcoming Environment this past September. Back row L to R: Shawn Randle, Caryn Adolph, Phyllis Scott, Artesha Moore, Monica Linders, Sarah Murphy, Melody Boykin. Front row from L to R: Regina White, Patrice Hall, and Kim Kelly**

## A New CEO

Chicago's association community extended a warm welcome to Artesha Moore, FASAE, CAE. Moore began her role as Association Forum's president and CEO in February of this year. She spent the first nine months on a listening tour, but has also made strategic moves to position the organization for success. You can read more about her thoughts and plans for the association in her CEO letter on page 6.



**Susan Neustrom, Ed.D. Bio, inspires members with her closing keynote at the Summit on Welcoming Environment.**

## Membership Changes

We strive to support the entire association community, which is why we recently updated our membership categories. The new categories include Supporting Members, who are professionals working for an industry supplier or consulting firm. We want consultants to feel welcomed into the fold, and we feel this change will facilitate that. Learn more on our website, [AssociationForum.org](https://AssociationForum.org).

## Excellence Week

In June, we held Excellence Week which consisted of a SIG Summit, CEOly Forum, Forum Forward, and our Honors Gala. Each event was a huge success and a great reminder that there's no substitute for in-person networking and celebrations.

## Summit on Welcoming Environment®

Our Summit on Welcoming Environment was held on a September afternoon after our quarterly SIG Summit. It was a great day that included sessions on imposter syndrome and operationalizing DEI in your organization. The day ended with a presentation from our own Welcoming Environment Committee on their renewed charge.

## SIG Summits

Our Shared Interest Groups (SIGs) have been a longstanding, beloved member benefit. There are 14 different SIGs and each present twice a year at quarterly SIG Summits. These half-day events are free for members and offer top-notch, peer-produced education, as well as networking.

**Continued on page 46...**



# ON A DIFFERENT LEVEL



With dynamic and walkable meeting districts, expansive green spaces and inspiring entertainment, Atlanta provides an elevated experience. When we host ASAE's Annual Meeting and Exposition in 2023, the city will boast new hospitality development - with even more on the way.

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**... Continued from page 14**

research and data work. When White was proposing a plan to condense the board, he had already thought of where the extra board members could still hold a place within the industry.

"I always try to find advocates on the board and I lean on them," White says of his role as executive director. When it came time to vote, his plan passed easily and without hurt feelings. White's ability to straddle industry politics and organizational change is a great example of how leaders can start to shift from the old paradigm to the new.

## How to Start Your Agility Journey

**"At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly."**

*PRINCIPLE #12, AGILE MANIFESTO*

Where do you start? Hopkins brightens at the question and immediately suggests a book called "Brave New Work" by Aaron Dignan. "He describes this process that I really love," Hopkins says. "It worked when I was at my old association, and it works with clients now."

The exercise is centered around a question: What is keeping you from doing the best work of your life? Specifically, what tensions are keeping you from being more agile and achieving what you want?

"You're basically collecting what your tensions are, be they organization-wide or in teams," explains Hopkins. "Often, people aren't comfortable saying tensions out loud in front of others," he adds, "that's one of the things with being more agile—being able to talk about tensions, out loud, together."

Tensions can be anything, Hopkins says: For example: too much work

in progress, a lack of resources in an area, or anything that's holding the organization back. Hopkins facilitates discussions with groups to collect organizational tensions and asks the group to prioritize them by voting on what's the biggest barrier to becoming more agile. Sometimes the tensions seem small, he says, and sometimes they're large, like the governance issues White faced at the TIA.

Then, the group breaks down the tension and forms a hypothesis to address it within a four- or six-week period. The set period "prioritizes brain power" according to Hopkins, and it helps the team practice a key trait of agility—time limitations. You run the experiment, you collect feedback, you review and then start again.

The tensions exercise is a great way to move your organization from a permission-based organization to a constraints-based organization, Hopkins says. Again, he draws from Dignan's book for an example. In the book, Dignan explains that permissions-based organizations are like traffic signal-controlled intersections, whereas constraints-based organizations are like roundabouts. At a traffic signal, you wait for permission to enter the intersection; you are told exactly what to do and little is left up to the driver. This is like a permissions-based organization wherein an employee needs to ask up the chain of command before completing work.

In contrast, roundabouts allow drivers to enter at their discretion and only places constraints on them. There is much more autonomy in a roundabout, allowing traffic to move quicker and adapt to the conditions of the moment.

In the U.S., we have far more traffic signals than roundabouts, but roundabouts are actually safer. According to the Insurance Institute for Highway Safety (IIHS), "The tight circle of


a roundabout forces drivers to slow down, and the most severe types of intersection crashes—right-angle, left-turn and head-on collisions—are unlikely." Furthermore, roundabouts improve traffic flow and are better for the environment since they involve less idling.

"We need more roundabouts, because that says, 'I trust you to make the decisions,'" says Hopkins.

## Bringing It All Together

Every expert I spoke to agreed on one thing: there are many ways to implement agility within an organization. Businesses are unique and seek out different opportunities while also facing unique challenges. That's one of the reasons why it's so fitting to think of them as organisms.

Yet, it's clear that the old styles of management and top-down permissions-based organizational structure have run their course. McKinsey notes that "a very small number of companies have thrived over time; fewer than 10 percent of the non-financial S&P 500 companies in 1983 remained in the S&P 500 in 2013."

Times and people change, and associations must change with them in order to stay relevant to their missions. Perhaps implementing agile principles is the way to stay relevant in the 21st Century; because The Management Century is officially over. 

### ABOUT THE AUTHOR:

KIM KELLY IS THE EDITORIAL CONSULTANT FOR ASSOCIATION FORUM. SHE ALSO OWNS KIM KELLY CONSULTING.







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**Above: More than 400 backpacks were donated to Kids Above All in Chicago. Attendees donated school supplies and monetary donations were matched by SOA.**

*The organization identified healthy eating and personal hygiene as two main areas of focus.*

Like our previous meeting, we invited the director of the charity to speak at our luncheon to bring awareness to the organization and the Backpack Drive which was set up just outside the luncheon doors. Making it as easy as possible for attendees to participate was key.

Our attendees assembled more than 400 backpacks that were donated directly to children in need to brighten the beginning of their school year. Attendees were able to donate school supplies directly from the Kids Above All Amazon Wish List and/or provide monetary donations to the

organization, which were matched by the SOA. We also developed a program allowing member organizations the opportunity to support the efforts by providing monetary donations that were used towards purchasing the materials for the drive.

Our annual meeting, the ImpACT Conference took place in late October 2022 in Orlando. The SOA partnered with Serenity's Grace, a local charity aimed at reducing the extreme poverty level in Central Florida. The organization identified healthy eating and personal hygiene as two main areas of focus. We provided materials for attendees to build toiletry/hygiene kits and asked attendees to bring items from Serenity's Grace's "needs list". At the time of writing, we were still brainstorming ideas to incorporate building healthy recipe cards to be used at the local food pantries.

## **The future of CSR**

What does the future hold for corporate social responsibility within our meetings and events? We intentionally designed our beginning efforts to be small and manageable, allowing room for us to learn as we move through the process and the opportunity to grow the programs. Our 2023 planning will start this fall and we are looking to extend our efforts further working with the cities and communities where we are hosting our meetings. [F](#)

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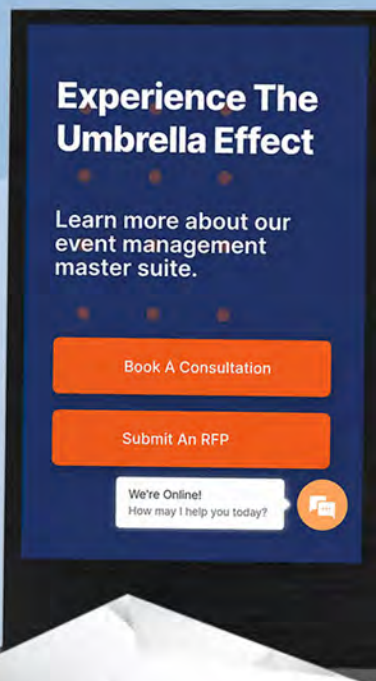
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Water Quality Association

**Carolyn Banich**, SHRM-CP  
*HR Manager*  
American Society of Anesthesiologists

**Yadashe Belay**, MSA  
*Director, Accreditation and Compliance*  
American Psychiatric Association

**Jennifer Brummet**, PhD, CAE  
*Manager, Research*  
American Epilepsy Society

**Cassie Buchanan**, MBA, SHRM-CP  
*HR Generalist*  
American Society of Anesthesiologists

**Emily Burch**  
*Vice President, Association Solutions*  
MCI USA

**Emily Burnett**  
*Senior Manager of Global Programs*  
Society of Women Engineers

**Biff Chaplow**  
*Executive Director*  
EEQual

**Caitlin Couture**, CAE  
*Senior Manager, Governance and Strategy*  
Endocrine Society

**Zachary Donah**  
*Vice President of Advocacy*  
Massachusetts Society of Certified  
Public Accountants

**Megan Drumm**, MBA, CAE  
*Marketing Director*  
American Academy of Orthopaedic Surgeons

**Bradley Elliott**, MBA, CAE  
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Houston Building Owners & Managers  
Association (BOMA)

**Sara Espinosa**  
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Challenger Center

**Jeff Evans**  
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American Society of Association Executives

**Tommia Hayes**  
*Social Media Manager*  
NCQA

**Jewel Hazelton**  
*VP of Membership Relations & Content Strategy*  
Wnet



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*Director of Membership*  
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**Rashidah McCoy**  
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**Jessica Montaña, MBA,**  
*Deputy Director*  
 New Mexico Association of School Business Officials

**Heather Niziolek**  
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 American Association of Endodontists

**Nikki Palluzzi, CAE**  
*Director, Member Services & Experience*  
 NAPFA

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*Director, Product Strategy and Evaluation*  
 American College of Chest Physicians

**Frank Perna, CAE, ICE-CCP**  
*Director of Certification*  
 National Association for Healthcare Quality

**Evan Reid**  
*Director of Data Analytics*  
 American Speech-Language-Hearing Association

**Alyssa Rojo, MSN, RN**  
*Nurse-Research Analyst*  
 American Association of Nurse Anesthesiology

**Meagan Roloff, MA, CCLS, CAE**  
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 Health Industry Distributors Association

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 American Society of Anesthesiologists

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 American Bankers Association

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*Director, Division Engagement*  
 American Psychological Association

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 American Boards of Internal Medicine

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 MobilityVision

**Jennifer Velazquez, MBA, DES**  
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## Forum After Dark

Once in June and again in September, Forum After Dark is consistently a great event. This networking series is all about fun. June's session celebrated Pride Month and September celebrated Hispanic Heritage Month.



**Above: Members mingle and reunite at Association Forum's Honors Gala. This year, the Gala was held in late June at the Chicago Marriott Downtown Magnificent Mile.**

# 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.

## Emerging Leaders

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.

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## Executive Leaders

The Executive Leaders program is a series of education and networking sessions 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.

## Forty Under 40

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.

## CEO's Kitchen Cabinet

The CEO's Kitchen Cabinet is a unique CEO learning community focused on critical problem-solving by examining challenges and opportunities through peer-to-peer engagement.



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## What is on your holiday wish list?

As we continue to settle into our new realities, we know that all of us have a wish list of items that we would like to have or see happen to make our work life easier and/or further our association's mission. With that in mind, we asked association executives: what is on your holiday wish list that will help your association flourish in 2023?

Whether it was an actual product or a tool, or an intangible wish that would help the association as a whole, below are some of the responses we received. Surely many of us can relate:



"Here's what is on my wish list: DUEX Lite, mobile monitor, As we're traveling and working remotely, I'd love to have this tool for all of my staff.

I'd also love to take my staff on a retreat to celebrate and rejuvenate!"

- **Annie Storey, CAE, Executive Director**
- Illinois Section, American
- Water Works Association
- Naperville, IL



"A long-term hybrid-work dynamic that maximizes the benefits for our employees, members, and the industry. Is that too much to ask from Santa?"

- **McKay Daniels, CEO**
- National Roofing Contractors Association
- Rosemont, IL



"On my holiday wish list is an email ticketing system for our Customer Service Center. We currently use an Outlook-based solution and want to be able to better understand and track our members' needs

as well as our level of service as we head in 2023."

- **Melissa Walling, MBA, CAE, IOM**
- Associate Executive Director,
- ALA Offices & Member Relations
- Chicago, IL



"I have two things on my Wish list: Dell 27 Video Conferencing Monitor - C2723H (link): I work from home with two monitors—a big 31.5" display and my open 13" laptop on the side of the monitor because it

has a webcam. Looking sideways at a webcam all the time during Zoom/Teams meetings isn't the best thing for your neck, ya know! Hoping to pick up this monitor soon to help straighten things out. Asana for Business (link) - During the pandemic, I knew that we needed project management software to keep things organized while our team worked remotely. TMA lives in Asana—we build conference planning deliverables, marketing calendars, employee onboarding checklists, and more. We have been using Asana Premium for over a year now and may finally be moving to the business version. Will my finance director approve this one? Fingers crossed!"

- **Laura Caputo J.D., Chief of Staff to the CEO**
- Turnaround Management Association
- Chicago, IL



"I'd love to see an information sharing and analysis organization focused on associations. We run an ISAO for our membership and the data and community around it have grown exponentially specific

threat intel for this community would be especially interesting."

- **Randy Gross, CISO & Chief Innovation Officer**
- CompTIA
- Downers Grove, IL





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