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**LEADING AT
EVERY LEVEL**

2023 | SPRING ISSUE | V107

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Publisher
Artesha Moore, FASAE, CAE
moore@associationforum.org

Editor-in-Chief
Kim Kelly, CAE
kelly@associationforum.org

ADVERTISING REPRESENTATIVES

Director, Business Services
Phyllis Scott
312.924.7033
scott@associationforum.org

Marketing Strategist
Kira Krewson
770.810.6982
kkrewson@naylor.com

Graphic Design
Brian Olson
BrianOlson.me

Association Forum
10 South Riverside Plaza
Suite 800
Chicago, IL 60606
...
312.924.7024
AssociationForum.org

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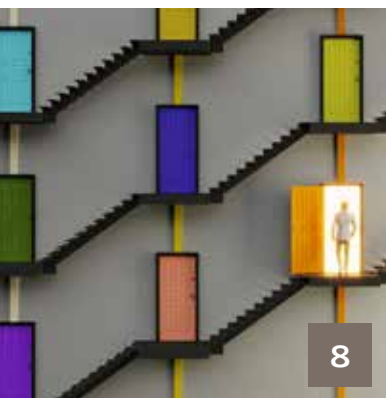
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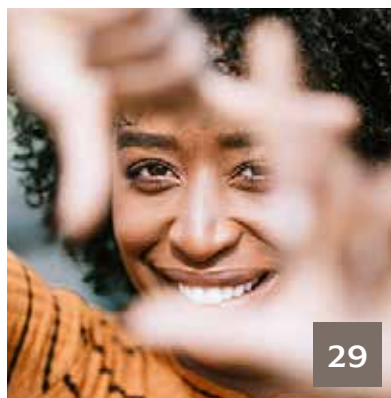
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LETTER FROM THE CEO



Leadership is a Mindset, Not a Job Title

*“Don’t lament so much about how your career is going to turn out. **You don’t have a career. You have a life.**”*

CHERYL STRAYED

This quote from Cheryl Strayed struck me. I started my career as a clerk at a for-profit company, found association work, worked up through management roles, and now I’m here—writing to you from the office of the CEO. Yet, when I look back on my career, I don’t see a ladder I climbed or a brimming resume. I see a life. I see the friends I’ve made and the industries I’ve helped.

I hope you see your career in the same light. Perhaps you are just starting your career and you are finding your footing. What do you like about your work? Do you desire management responsibilities, or is another direction appealing to you? Perhaps you’re in that middle phase—you have plenty of work history, but you’re not quite counting down to retirement yet. Or maybe you are coming back to work after some time away to do the important and often overlooked work of caretaking. Or, you might be nearing

the end of your career and planning the next chapter of your life that’s filled with family and personal pursuits.

Whichever career stage you find yourself in, remember it’s your life. There is no right or wrong answer to how you got here and where you go next. This is what we mean by this issue’s theme: Leadership at Every Level. I truly believe that leadership is a skill, not a position or an assumption of title.

Recently, I shared a graphic with Association Forum’s senior staff. It’s something the author and futurist Jacob Morgan posted on LinkedIn. The graphic shows two cartoon business people with icons depicting competencies and is titled “Manager Vs. Leader.” On the manager’s side are things like: believes in status quo; focuses on efficiency; leads with authority; develops process; knows it all; and has a fixed mindset.

The leadership side includes an evolved look at each of these areas: believes in experimentation; focuses on empowerment; leads with influence; develops people; and has a growth mindset.

You don't need to be a manager to be a leader. Likewise, titles don't make a leader.

I just closed out my first year as CEO of Association Forum. I have been listening to anyone and everyone who would speak with me about this community. One of the things I heard time and again was that our focus was too narrowly aimed at the very top of organizations. For a group that trademarked the term Welcoming Environment®, our CEOnly programming felt exclusionary.

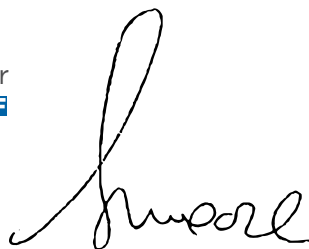
We hear you. I will continue to listen, but I'm also ready to act. One area we're focusing on is our audiences and delivering content, community, and value to all our members. Functional experts are the people who have deep knowledge of a specific skilled area. Managers and directors are building teams and empowering their direct reports. The C-suite is holding it all together by inspiring and coaching the people they lead. All of these roles have room for leadership.

Whenever someone asks me to mentor them, I agree but also ask for their mentorship in return. Often these folks are younger than me and newer to association work. But I know that they have experiences and perspectives I can learn from. They may be willing to tell me what's on their mind and I may have people working for me with similar thoughts. I am always open and I am always learning.

I was recently asked to speak on a panel for female executives. When asked about career advice, I always come back to the same tip: know the job. It's that simple. If you are a functional expert, your job is to be the best at the functional areas you're assigned. If your job is in management, you are responsible for the growth and excellence of a team. The problem is that every time I get into a groove, I change roles and run into a new hurdle. This has certainly been the case as CEO. After one year, I'm getting to know the job.

Part of knowing the job is understanding where you can lead. Leadership is going to look different depending on your role, but it's more of a mindset than a bullet point in a position description. Stay open, keep learning, and focus on your relationships with people.

Importantly, keep reading this issue for more ideas on how to lead at any level. [F](#)



Association Forum is here to support you in your leadership journey, no matter your level. Here are some programs that can help you develop the skills and mindset to advance in your career.

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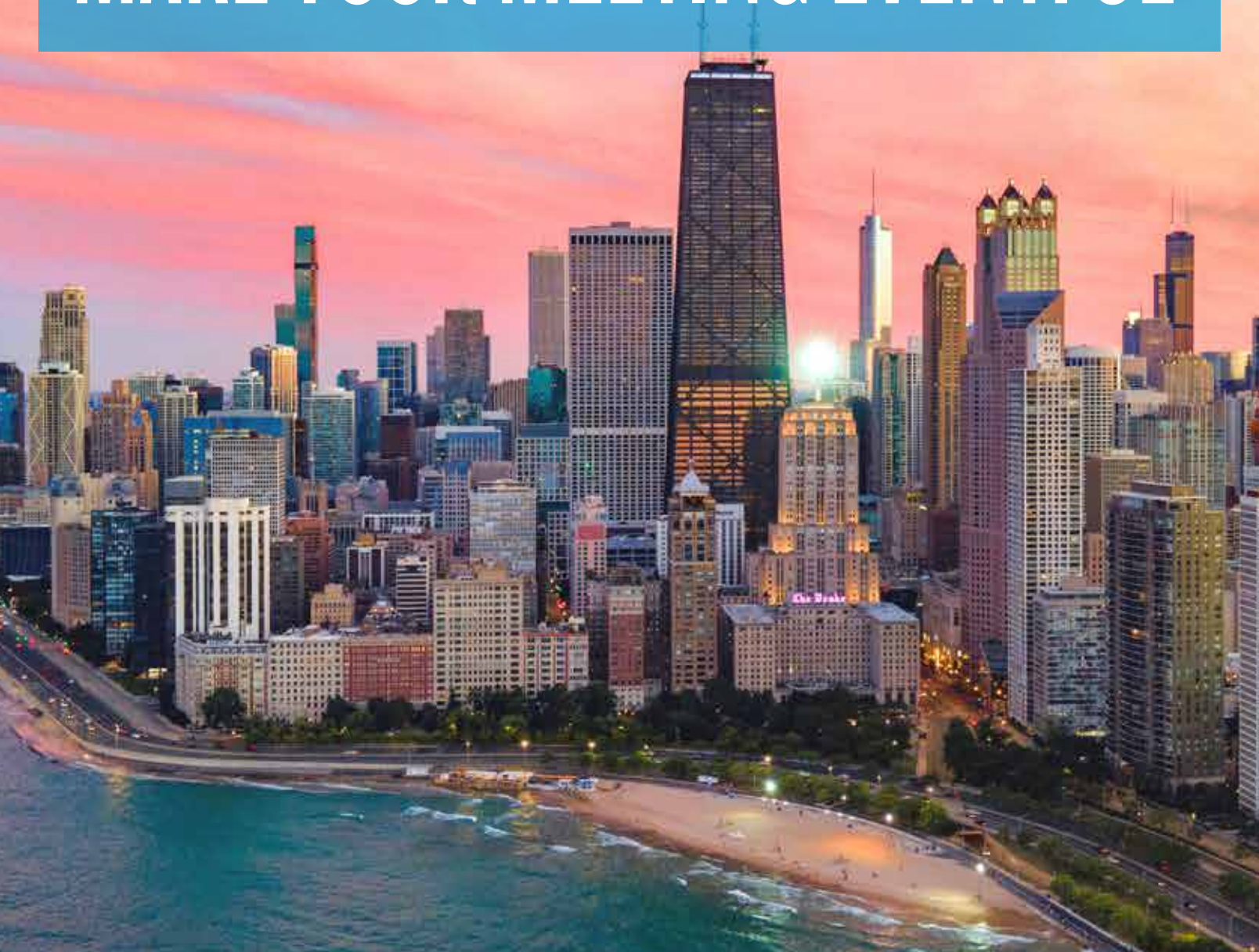
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Be a Welcoming Environment

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.

Nell'ambito del nostro impegno a fornire un Welcoming Environment® per i nostri membri, forniamo una copia dei nostri valori fondamentali tradotta in italiano da Interpro Translation Solutions, Inc.

Essere un Welcoming Environment

Siamo un ambiente accogliente che cerca attivamente di valorizzare la comunità più ampia riconoscendo che il tutto è maggiore della somma delle parti. Faremo sentire benvenuti, rappresentati, coinvolti, ispirati e responsabilizzati tutti quelli che interagiscono con noi.

Adottare innovazione e qualità

Ci piace provare nuove idee e cercare ispirazione all'interno e all'esterno della comunità dell'associazione: apprezziamo i miglioramenti grandi e piccoli. Incoraggiamo ed encomiamo la sperimentazione di innovazioni; tuttavia, sappiamo quando è il momento di la spina. Miriamo a migliorare continuamente.

Divertirsi e rimanere positivi

È un dato di fatto che in genere si trascorre più tempo con i colleghi che non con la propria famiglia. Ci sforziamo di rendere il nostro ambiente di lavoro divertente, positivo e in generale, un ottimo posto di lavoro.

Comunicazione aperta e onesta e lavoro di squadra

Se non lo sai, non lo sai! Una comunicazione efficace è fondamentale. Coltiveremo un ambiente in cui parliamo apertamente, onestamente e con l'obiettivo di costruire una squadra migliore. La trasparenza viene accolta in modo costruttivo. Collaboreremo per portare valore ai membri.

Responsabilità: il nostro must

Ci riteniamo responsabili e ci aspettiamo che le persone pongano domande e sollevino preoccupazioni in modo rispettoso. Poiché il lavoro richiede team interdipendenti e collaborazione, ci fidiamo e dipendiamo l'uno dall'altro per essere reattivi e offrire servizi di valore e di qualità agli stakeholder.

Vincere con rettitudine

Operiamo eticamente, contribuendo con il nostro tempo, i nostri talenti e il nostro know-how per far progredire le comunità in cui lavoriamo e viviamo. Ci impegniamo a far crescere la nostra associazione in modo da favorire l'ambiente e la società.

LEADING AT EVERY LEVEL:

HOW INTRAPRENEURS WILL
HELP YOU BUILD THE
ASSOCIATION OF
THE FUTURE

By Kim Kelly, CAE

***“Ahuja scales innovation** to something attainable for any organization. While she works with corporations such as Target, Pepsi, and US Bancorp, Ahuja’s definition of innovation is just as applicable to nonprofit associations. We have members, not customers. Yet, creating everyday value is paramount to an association’s success and longevity.”*

“Great ideas are what drive organizations forward. Those that fail to embrace innovation and change may lose more than a missed opportunity,” serial entrepreneur Hernan Lopez writes in an article titled “You Have a Great Idea, But You Work for Someone Else. What Do You Do With It?” on Entrepreneur.com.

As the former founder and CEO of Wondery, a podcast network, Lopez knows a thing or two about entrepreneurship. But he’s not talking about entrepreneurship in this article—he’s talking about intrapreneurship.

Intrapreneurship is when an employee drives innovation that advances existing business goals (like growth, engagement) and tests those new ideas. It’s similar to entrepreneurship, but instead of creating a startup, they work on the inside of their organization.

For many of us, intrapreneurship is a new term. Yet the concept has been around for some time. According to an article posted by MIT Management’ Sloan School in June 2018, Gifford Pinchot III and Elizabeth Pinchot used the word in their 1978 paper “Intra-Corporate Entrepreneurship” and again in their 1985 book “Intrapreneuring.”

At Holiday Showcase® last December, Dr. Simone Ahuja spoke on intrapreneurship during her keynote address. Ahuja is CEO of Blood Orange, a global innovation strategy firm that works with Fortune 500 companies. She’s also a bestselling author and co-developer of Jugaad Innovation, a frugal and flexible innovation methodology that lends itself particularly well to the nonprofit model because it doesn’t rely on traditional resources (like budget).

Ahuja spoke with us again for this article, elaborating on concepts she introduced at Holiday Showcase and applying her strategic insights to association work.

What is intrapreneurship, and how do you incorporate it into association work?

What is innovation? This is a question Ahuja often asks rhetorically in her keynote addresses. “The truth is, even in my own industry, people don’t always have clarity on that,” she says, adding, “Even if you go to the world’s most innovative organizations, they don’t always have a shared definition of innovation; which makes it pretty hard to go after.”

Ahuja defines innovation as creating new value. The value could be a myriad things: increasing customer satisfaction, increasing usability and accessibility, or increasing customer reach. “Innovation is not just about the next iPhone,” she says. “It’s not only about flying cars ... Mostly it’s new value creation in the things we do every single day.”

With this definition, Ahuja scales innovation to something attainable for any organization. While she works with corporations such as Target, Pepsi, and US Bancorp, Ahuja’s definition of innovation is just as applicable to nonprofit associations. We have members, not customers. Yet, creating everyday value is paramount to an association’s success and longevity.

“Innovation often feels massive and overwhelming,” Ahuja says. But, she stresses, we have to change the way we think about it. “When innovation means value creation, it applies to user experience, for example, do our members feel heard, getting someone through a line at a conference more quickly, or enjoyably,” she says. This creates value because it saves time and reduces frustration.

Reflecting on Blood Orange’s 8-week innovation workshops, Ahuja says that after using our methodology, many participants realize that the problem they are trying to solve is reducing frustration. While the concept sounds simple, it’s applicable to every department of an association. Your leadership is trying to conduct efficient and effective board meetings (i.e., reducing frustration for board members). Your communications team is updating the website with an eye for high value content and usability (i.e., reducing frustration for members). Your conference staff is booking the very best speakers while choosing thoughtful and inclusive menus (i.e., reducing frustration for attendees). Your finance department is setting up ACH payments to get vendors paid faster (i.e., reducing frustration for preferred vendors). You get the idea.

“How do we know we’re solving the right problems?” Ahuja asks, adding that many innovation initiatives start with assumptions, rather than a clear process to identify problems to solve. Research, member surveys, and focus groups may get you closer to an answer. But Ahuja also recommends paying attention to a variety of feedback channels. Are people complaining a lot about something? Take note. “Questions like, ‘Why do we do it that way?’ are an excellent prompt to help identify pain points and encourage intrapreneurship,” she adds. This is where “leadership at every level” truly takes shape.

It’s unlikely that your executive leadership is fielding daily calls from members. Depending on the size of your staff, there may be several layers insulating leadership from the everyday frustrations and “unmet needs” of the people they serve. By empowering all staff members to innovate, association leaders can not only identify the right problems to solve, but also create a sense of agency and engagement while bolstering your association’s growth.

Creating a culture of innovation and intrapreneurship

Our previous issue of FORUM Magazine (Dec. 2022) explored agility and associations. Agile Methodology is a well-known system in the IT and software development world that is increasingly being applied to all types of businesses. Agile associations move quickly by producing work in cycles, continuously testing ideas, and reviewing projects with a mind towards improvements. What’s foundational about this approach to business is building psychological safety and trust within a team. Innovation can’t happen without it.

Intrapreneurship shares this approach. In 2015, Deloitte published a whitepaper offering five insights on intrapreneurship. Insight 1: “Intrapreneurship describes a people-centric, bottom-up approach to developing radical innovations in-house.” In essence, intrapreneurship thrives on leadership at every level.

According to that same Deloitte paper, 88 percent of Fortune 500 companies in 1955 were no longer present in 2015. It’s not that they didn’t make the list—they no longer existed.

Fortunately, associations have stood the test of time. Like several Chicago associations, Association Forum is more than 100 years old. But we can hardly expect to operate the same way we did 100 years ago. In addition, change seems to move faster these days. One reason for this is due to technology. Technological advances are literally growing exponentially and we have more information at our fingertips right now than ever before.

According to the U.S. Chamber of Commerce Foundation, 90 percent of the world’s data has been produced in just the last two years. So how does your organization keep up?

“Our primary revenue sources cannot be the same as they always were,” says Ahuja. She acknowledges that some organizations have a strong hold on their industries, but she still pushes the idea of innovation to ensure those organizations can not only maintain their place, but grow sustainably. “Leaders, managers and employees often have the same question - where do we start? We suggest starting with the unmet need of the customer.”

She outlines a simple framework to identify these needs: the functional need, the emotional need, and the social need. The functional need is what a product or program does for a customer, whereas the emotional need is how it makes them feel. Finally, the social need is how the customer wants to be perceived. Ahuja stresses that listening to members is important, but observing them is equally valuable to hone in on their needs - especially those that often go unsaid.

Deloitte Insight number 5 asserts that “intrapreneurship requires a different management approach.” According to Deloitte’s research, an intrapreneur’s skill set and intrinsic motivations strongly differ from the average employee—so why would you manage them the same? The report lays out seven steps that can create a healthy intra-

preneurial environment: support, autonomy and responsibility, motivation and incentives, compensation, resources, communication, structure and processes.

“Entrepreneurial companies have a decentralized structure, where managers delegate decisions to the lowest possible level to ensure that they are made by those with the most knowledge,” the report reads. This is not unlike the workings of agile organizations.

“My firsthand experience and emerging research make it clear that intrapreneurs feel a sense of agency,” Ahuja says. She says that empowering the intrapreneurs in your organization creates engagement because they feel valued, they can feel the progress, and they are typically passionate about the work they are doing. What’s more, the organization can see immense returns.

Companies like Google (20% time) and Facebook (hackathons) are famous for encouraging innovation. 3M’s post-it notes were created by an intrapreneur working on adhesive for the aerospace industry. Playstation was created by an intrapreneurial Sony employee.

For associations with less resources than a Fortune 500, how can they encourage innovation? “Start talking about innovation and build it into things that already exist,” says Ahuja. She says that leaders need to signal to employees that it’s ok to test things out and innovate from inside the organization.

“Let’s say you have a standing, small group meeting,” says Ahuja, adding, “and at the beginning of that meeting for 10 minutes, everyone shares an idea and tells us what problem it’s rooted in. There may be additional discussion or ideas that build on the original idea. A simple practice like this can help you start to build a community that’s willing to share, and one that feels empowered to help the organization advance.” This requires vulnerability from leaders to create psychological safety. Leaders can do this by demonstrating what it looks like to share new ideas and also listen without judgment, Ahuja says.

Encouraging intrapreneurship can pose a challenge to conventional management styles, but the payoff can be huge. Remember, “intrapreneurship isn’t about going off the rails - it’s about advancing existing business goals better, faster and with fewer resources,” says Ahuja. “The benefits are a sustainable growth and a healthier culture including team members who feel dialed in and engaged, tremendous benefits and new value for your membership ... all of which have a ripple effect on society. It’s pretty significant,” she says.

How to become an intrapreneur

According to Deloitte, “it’s not about creating intrapreneurs, it’s about finding and recognizing them.” If you are the type of person who is brimming with ideas and looks at challenges not as setbacks, but as a puzzle to be solved, there’s a good chance you have the intrapreneurial spirit.

But first, let’s back up and discuss why you would want to be an intrapreneur in the first place. After all, if your idea is that great, why not become an entrepreneur and profit off your success?

Lopez outlined the many pros of intrapreneurship in his article: “you will not need to spend excessive time procuring funding, setting up legal entities or deciding which health plans to offer for employees you haven’t even hired yet. Instead, you will benefit from a brand, a client list and access to colleagues who will return your calls and offer help. You’ll continue to get a cash salary that’s significantly above what typical startups provide, as will your team. And if you have a family, you won’t have to take them on a daily rollercoaster ride.”

In essence, you take on much less risk as an intrapreneur than you would as an entrepreneur. Lopez is an interesting advocate for intrapreneurship, because he chose to become an entrepreneur when he left his role as CEO of Fox International Channels to start Wondery. But he doesn’t think his decision is for everyone. In fact, he offers four questions that helped him make his decision:





PINCHOT'S TEN COMMANDMENTS FOR INTRAPRENEURS

Remember Gifford Pinchot III, who is credited for first using the term “intrapreneur”? Here are 10 commandments he offers from his book “Intrapreneuring: Why You Don’t Have to Leave the Corporation to Become an Entrepreneur.”

1. Work underground as long as you can—publicity triggers the corporate immune system
2. Remember it is easier to ask for forgiveness than for permission
3. Do any job needed to make your project work, regardless of your job description
4. Follow your intuition about the people you choose, and work only with the best
5. Circumvent any orders aimed at stopping your dream
6. Find people to help you
7. Never bet on a race unless you are running it
8. Be true to your goals, but realistic about the ways to achieve them
9. Honor your sponsors
10. Come to work every day willing to be fired

1. Does your company encourage internal innovation?
2. How does the company treat projects that fail?
3. How long will it take?
4. Have you already used any company assets?

His fourth point is critical from a legal standpoint. “Even if you only wrote a business plan draft on the company laptop while on vacation, you must bring the idea to your employer,” Lopez writes.

Questions one and two have to do with your organization’s culture. Ultimately, you need to assess whether this is a safe place to pitch and explore innovative ideas. Organizations that penalize failure don’t promote innovation.

If you feel your idea is fit for intrapreneurship, consider approaching your leadership. Pay attention to your organization’s culture and be prepared to hear “no.” Entrepreneurs hear “no” all the time. Unlike an entrepreneur, most intrapreneurs have to take “no” for an answer. But don’t let that deter you. Either use the opportunity to go back to the drawing board, or consider making a move to an organization that’s more supportive of innovation. Ahuja offers a “recontracting” worksheet that helps employees reimagine their role in innovation, and build a simple plan for approaching managers, so managers can say yes to intrapreneurship more often.

What truly sets intrapreneurs apart is passion. Intrapreneurship involves hard work and risk. You must be passionate about the project to pursue it and take on the extra work and stress that comes with innovation. [F](#)

KIM KELLY, CAE

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HOW ASSOCIATION CREDENTIALING AND CERTIFICATIONS ARE **MAKING THE WORLD A BETTER PLACE**

By Jorge Rivera, CAE, IOM



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CONTRACTORS
ASSOCIATION.

Association credentialing and certifications ensure the competency and professionalism of individuals in various industries. These programs set standards for excellence and protect the public, thereby increasing confidence and trust in the services provided. While we often hear about the positive impact of credentialing in healthcare and education, there are other examples that have the potential to improve public safety and benefit society as a whole. In this article, we will examine how some associations are making a positive impact in unexpected ways.

Society of Actuaries

Artificial Intelligence (AI) and predictive models are trained on data, and if the data used for training contain biases, then the models will likely perpetuate those biases in the results they generate. These models use patterns in the data to make predictions, and if the data reflects a biased perspective, the models will learn and reinforce those biases.

For example, if a predictive model is trained on a dataset of job applicants and the data shows that certain groups are less likely to be hired, the model may learn to predict that those groups are less desirable candidates and make biased hiring recommendations. Similarly, if a facial recognition system is trained on a dataset that has a disproportionate representation of certain races, it may have difficulty accurately recognizing and differentiating individuals from under-represented groups.

Jeremy Webber, director of education program development for the Society of Actuaries, describes the challenge this presents to their members, "Predictive models and artificial intelligence have the capability of unintentionally creating biased results. As these tools become widespread in insurance, it is essential that actuaries have the tools to detect and prevent such bias. The Society of Actuaries certificate program in

the Ethical and Responsible Use of Data and Predictive Models provides these tools, enabling actuaries to fulfill their obligations to clients, regulators, and the public."

The Society of Actuaries launched a virtual "Ethical & Responsible Use of Data & Predictive Models Certificate Program" to provide comprehensive training for those involved in creating or deploying predictive models. The program aims to deepen participants' understanding of ethical issues related to data use and the unique risks posed by predictive analytics and AI. It provides hands-on, practical training with real-world examples to help learners grasp best practices and apply them in their work. The program also highlights the importance of model explainability and the role of communication and teamwork in reducing the risk of unintended biases and unanticipated outcomes.



As AI-driven predictive modeling is beginning to permeate aspects of our work, it is crucial to detect biases to ensure fair and accurate results. By regularly auditing and monitoring models for bias, organizations can proactively address and prevent these issues, maintaining the integrity and credibility of their predictive systems. Furthermore, detecting and correcting biases in AI models is essential for creating a responsible and ethical use of this technology.

TO LEARN MORE ABOUT SOA'S
PROGRAM VISIT, [SOA.ORG/PROGRAMS/
ETHICAL-RESPONSIBLE-DATA-CERTIFICATE/](https://soa.org/programs/ethical-responsible-data-certificate/)

National Roofing Contractors Association

“We have lost our appetite for underwriting roofing projects where torches are used.”

This was the sentiment shared by CNA Insurance during a 2002 meeting with the National Roofing Contractors Association (NRCA).



CNA was concerned about the rise of fire-related claims from torch-roofing (\$14 million in losses), but agreed to consider a risk management approach after discussions with NRCA; resulting in the NRCA being tasked to present a plan to CNA's leadership.

Tom Shanahan, MBA, CAE, NRCA's vice president of enterprise risk management, describes the undertaking: "NRCA reached out to the Midwest Roofing Contractors Association (MRCA), which already had a certified roofing torch-applicator program known as CERTA, and asked MRCA to form a partnership to create a national program. MRCA agreed, but at the time, there only were a few trainers qualified to teach the MRCA CERTA class, so finding a way to build a cadre of trainers was key to train a large number of torch applicators."

Concurrently, NRCA was awarded OSHA training grants for various subjects. The most recent grant awarded was for creating a train-the-trainer safety program. The grant helped make development of a torch-specific, train-the-trainer program a natural fit. Instructors who passed the CERTA trainer course would be authorized to teach applicators using what would become the revised CERTA program. The NRCA/MRCA CERTA program would include developing best practices for torch-applied roof system installation and safety. These practices provide guidance for applying roof membranes safely and inspecting roofs properly to mitigate fires.

NRCA's presentation to CNA was successful and within a few months, NRCA began offering the new CERTA train-the-trainer class. Classes were well-attended, and newly authorized trainers were teaching field roofing workers at a significant pace. More importantly, insurance claims were halved. This downward trend continued and torch-related losses stabilized to an acceptable level. Interestingly, as the good



claims experience news spread, more and more non-CNA insured members sent staff to the program. CNA's trust in NRCA's training program paid off not only for their book of business, but also for the safety of workers in the industry as whole.

TO LEARN MORE ABOUT THE CERTA TRAINING PROGRAM GO VISIT: [NRCA.NET/EDUCATION/CERTA](https://www.nrca.net/education/certa)

National Association of the Remodeling Industry

When the National Association of the Remodeling Industry (NARI) started offering certifications back in the 80's, it was in partly due to members wanting to differentiate themselves from the rest of the industry.



Members took pride in being a community of premier professionals. The certification programs were also a way for these individuals to validate their skills. The association's goal was to raise the bar within the industry and to be able to relay that to the consumer.

"The majority of U.S. adults who are aging, plan to age at home ... and we are also seeing an increase in multi-generational housing," says Plamena Todorova, director of credentialing and education at NARI. As Baby Boomers age and approach retirement, they face new challenges and needs. This often means making adaptations and modifications to their homes to accommodate changing physical needs, such as installing grab bars, wheelchair ramps, and wider doorways.

The concept of universal design has been around for some time now and is being more readily adopted, in part, to respond to this large demographic. But they are not the only ones who benefit, "The concept of universal design is creating and retrofitting spaces so that they are useable by a variety of people regardless of ability. This would include aging in place, people with disabilities and multi-generational households as well." says Todorova.

In response, NARI created the Universal Design Certified Professionals (UDCP) designation, where experienced remodelers are recognized for their skills in universal design and remodeling. The program covers various aspects of universal design, including conducting client needs assessments, applying universal design to remodeling projects, construction techniques for implementing universal design, plumbing and electrical



systems specific to universal design, and differences between building codes and the Americans with Disabilities Act (ADA).

“Another part of universal design is creating homes that are stylish and don’t look clinical ... there are products and designs available that can make world class designed homes

: *“The concept of universal design is creating and retrofitting spaces so that they are useable by a variety of people regardless of ability. This would include aging in place, people with disabilities and multi-generational households as well.”*

with universal design elements,” explains Todorova. “Our goal is not only to raise the professionalism in the industry, but also raising the awareness of clients that there are professional remodelers out there that can help them with all their needs,” she adds.

With an estimated 74 million Baby Boomers in the U.S., and another 41 million people with special needs, the impact of these programs will be felt for generations to come. [F](#)



IF YOU WOULD LIKE TO LEARN MORE ABOUT NARI’S CERTIFICATIONS PLEASE VISIT [NARI.ORG/CERT](https://nari.org/cert).

NARI’S CLIENT FACING WEBSITE ALLOWS CONSUMERS TO SEARCH A MEMBERSHIP DIRECTORY TO FIND QUALIFIED REMODELERS: [REMODELING-DONERIGHT.COM](https://remodeling-doneright.com)

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VALUING A WELCOMING ENVIRONMENT LEADS TO **MORE OPEN DEI DIALOGUE IN THE BOARDROOM**

By Mike Norbut, MSJ, MBA

In any given meeting, a high-performing board will typically engage in three forms of governance: fiduciary (operational decision making), strategic (setting direction), and generative (horizon scanning and blue-sky discussions). Developing an agenda using this framework not only helps ensure that time-sensitive business items are addressed efficiently, but it also provides flexibility to engage the board in what it does best: providing high-level leadership for your association.

So, what mode of governance should a board be in when it discusses Welcoming Environment® topics? The answer, according to association executives, is any of the three, depending on where your organization may be on its diversity, equity and inclusion



It also helps to create an open dialogue that demystifies terminology and ensures organizational leaders are on the same page with their definitions.

(DEI) journey. The keys are understanding the landscape among your members, assuming positive intent, creating an open and psychologically safe space in the board room to have the conversation, remaining consistent in your message and advancing the Welcoming Environment discussion in a progressive, productive fashion, they said.

Associations that prioritize a Welcoming Environment as a strategic imperative will likely find opportunities to brainstorm about initiatives and report on their progress during a typical meeting. However, organizations that have not previously engaged in those conversations may need to start with more fundamental discussions about an organization's mission, vision, and values.

You don't have to wait for a dedicated strategic planning retreat to open this conversation, staff leaders said. With our workplace and social environments changing rapidly, it's natural to revisit these core topics on a regular basis. "Before you introduce the topic, have your board articulate your values as an organization," said Khánh Vũ, CEO and executive director of the Society of Asian Scientists and Engineers. "It's easier to talk about it if it's a value. You can define inclusion broadly as a starting point to get the board's buy-in."

It also helps to create an open dialogue that demystifies terminology and ensures organizational leaders are on the same page with their definitions. For example, the American College of Foot and Ankle Surgeons developed a diversity policy years ago, but a "level setting" conversation in 2020 helped to bring Welcoming Environment topics back into the forefront. Discussions helped to propel several initiatives such as a leadership development program that aims to support DEI efforts by creating an educational pathway to infuse the diversity and talent of future leaders into the ACFAS volunteer pipeline.

Over time, ACFAS has incorporated DEI into its board discussions more organically, without having to specifically label them. As initiatives grow, board members and staff naturally discuss how they are reflecting the college's value of diversity and inclusion, which states: "We are committed to fostering a community that promotes respect for diversity of opinion, inclusive of all origins with transparent and open communication."

"It takes time," said Patrick (PJ) Andrus, MBA, CAE, executive director of ACFAS. "We weren't going to solve this in a 30-minute conversation or with one new initiative, which is why it was important to define the college's core values in our strategic plan to serve as a constant touchpoint in deliberations."

The Society of American Archivists also lists diversity and inclusion among its core values, and dives into a deeper explanation through a position statement describing these ideals. The society has a variety of committees, working groups and roundtables dedicated to DEI and accessibility, and it has “cross-pollinated” its DEI strategies with its strategic plan. The result is an ongoing dialogue with actions embedded in core principles and a clear direction for the organization.

: “You won’t find SAA with two different documents,” said Jacqueline Price Osafo, MBA, CAE, the Society’s Executive Director. “(DEI) is not a strange conversation for us to have.”

While many associations have embraced and promoted a welcoming environment for decades, 2020 was a tipping point in terms of their activity and involvement in social justice activities. Shifting a board’s mentality from supporting diversity, equity and inclusion to actively advocating on behalf of historically marginalized, minoritized and excluded (HMME) populations required deeper and more transparent discussions that have helped to accelerate progress today, staff leaders said. In many cases, those discussions were uncomfortable as well; but leaders agree that it’s vital for boards to pursue these discussions in spite of personal discomfort.



The American Society of Human Genetics specifically identified diversity as a strategic imperative in 2019, which opened the door to a series of frank, open and self-reflecting discussions examining and wrestling with the Society’s history. In the wake of George Floyd’s murder in the summer of 2020, these conversations shifted to action. While it’s not an end point, the tangible result of these discussions is a 42-page report released in January titled, “Facing Our History – Building an Equitable Future Initiative.” The report reckons with the connection between early human genetics research and the eugenics movement, which “exploited preexisting prejudices and promoted the idea that ‘unfitness’ was genetically determined,” according to the report. It also details how ASHG was silent, particularly during the 1960s and 1970s, when human genetics were being used to perpetuate racist policies.

“The society affirmatively seeks to reckon with, and sincerely apologizes for, its involvement in and silence on the misuse of human genetics research to justify and contribute to injustices in all forms,” the ASHG board said in an accompanying statement.

Along with this acknowledgement of the past, the ASHG board’s statement reflects a firm commitment to embracing diversity, equity and inclusion and proactively supporting initiatives to advance a welcoming environment moving forward. This has manifested in a variety of initiatives and discussions, including board composition and the addition of a dedicated DEI senior staff member who has expertise in diversity, inclusion and health equity.

“That (staff) addition has not only helped drive specific initiatives forward, but she also has helped us be more culturally competent overall,” said Mona Miller, MPP, ASHG chief executive officer.

As DEI becomes more transcendent across organizations, its impact becomes more measurable and easier to report, staff leaders said. From member demographics data, leadership pipeline discussions or specific progress reports on new programs, there are myriad opportunities to include the



welcoming environment value in a board meeting without specifically calling it out as a bullet point on the agenda.

“Many boards lack a sense of urgency in addressing inclusion, perhaps believing current practices are sufficient.”

Still, there are certain realities and frameworks that can impact an association’s progress, including the fact that leaders turn over and new members join the board every year. Many associations are working to address this through revisions to the board nomination and selection process, including replacing board elections with an uncontested slate chosen by a leadership development committee that vets and selects candidates based on competencies, skills and multi-representational factors that will ensure more diverse voices in the board room. As those changes take hold, there are ample opportunities for training on DEI topics, such as implicit bias, microaggressions and cultural awareness.

Associations also can make time for regular generative discussions related to perspectives and experiences. Wendy-Jo Toyama, MBA, FASAE, CAE, CEO, and executive director of the American Academy of Hospice and Palliative Medicine, has facilitated these discussions in both a staff leadership and consulting role. Asking a board member with a lived experience to share their perspectives can elevate awareness for other board members and provide a valuable discussion outlet for the leader who is sharing, she said. However, organizations also need to consider the impact of having someone share their experience if they are the only person in the room representing a certain perspective or population.

“It has been transformative,” she said. “You just don’t want to put that person on the spot. You want to ask that person in advance to make sure they’re comfortable.”

As boards continue on their DEI journeys, they will begin to recognize a cadence and rhythm to their welcoming environment discussions, staff executives said. However, it’s critical to remain vigilant. The 2021 ASAE Research study, “DEI and Association Governance Practices: Are Association Boards Embracing DEI? Practices and Plans for Diversity, Equity, and Inclusion in Governance,” offered several important conclusions, including this: “Many boards lack a sense of urgency in addressing inclusion, perhaps believing current practices are sufficient.”

“When I speak on DEI, I use this quote to signify that if boards believe that DEI will happen organically, it will not,” said Debbie Trueblood, MSW, IOM, CAE, FASAE, a senior consultant with Association Management Center. “It must be intentional. I tell boards, ‘If you keep doing what you’ve always done, you’re going to get the same results in terms of board diversity.’”

Over time, vigilance can lead to a culture shift for an organization, as welcoming environment discussions are embedded across a board agenda. This in turn will open the door to new initiatives and a deeper investigation of how associations can continue to positively impact the communities they serve.

“It’s really threaded across our work,” Miller said. “We continue to ask ourselves, ‘Where are we uniquely positioned to make a difference? Where will we go deep?’”¹⁶

MIKE NORBUT, MSJ, MBA

MIKE IS VICE PRESIDENT OF BUSINESS DEVELOPMENT FOR ASSOCIATION MANAGEMENT CENTER, BASED IN CHICAGO.



HE CAN BE REACHED AT
MNORBUT@CONNECT2AMC.COM.

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In the pages that follow, you'll find articles on Excelerate's three theme areas: New Power Leadership, Tomorrow is Now, and Intrapreneurship. Keep an eye out for these themes within all of Association Forum's content.



BECOMING A FIT-FOR-PURPOSE ASSOCIATION DIRECTOR

By Jeff De Cagna, FRSA, FASAE


NOTE: THIS IS AN OPINION PIECE. THE VIEWS EXPRESSED WITHIN THIS ARTICLE ARE SOLELY THE AUTHOR'S AND DO NOT REFLECT THE OPINIONS AND BELIEFS OF ASSOCIATION FORUM.

The fourth year of the turbulent twenties is underway. We are all witnesses to the impact of powerful social, technological, economic, environmental, and political (STEEP) forces that continue to create turbulence in our world, our country, our industries, and professions, and our associations. As these forces accelerate and intensify in the years ahead, the interactions among them will produce even more significant disruptions and threats. These complex issues are not going away, which means fit-for-purpose association boards will need to make many tough decisions to navigate unforgiving conditions, safeguard their stakeholders and successors from harm, and guide their associations toward thriving throughout this decade and beyond.

For anyone interested in joining an association board, please read this as a sober and unsparing reminder that board service is not a vanity exercise, a member benefit, or a reward for an association's most loyal contributors. Association board service demands genuine seriousness of purpose, demonstrable capabilities, and an unwavering commitment to accept the burdens of

stewardship, governing, and foresight (SGF) from every director and officer.

I do not offer this warning to dissuade anyone from pursuing their professional ambitions. As a past association director and national non-profit board chair, however, I understand that voluntarily accepting great responsibility and devoting oneself to a higher calling for



the benefit of others—including standing up for the futures of long-term successors whose identities remain unknown—is a momentous personal decision that cannot be taken lightly.

Six Reflection Questions

Building a fit-for-purpose association board begins with identifying fit-for-purpose board candidates. Are you one of those people? To help you decide whether you are ready to serve, I challenge you to reflect deeply on the following six questions. (Please keep in mind that deep reflection requires a quiet, distraction-free physical space in which you can concentrate on each question and capture your thoughts in writing, whatever that means to you, so you can continue to examine and refine them.)

1. **Why do I want to serve on an association board?** According to our community's orthodox beliefs, i.e., the deep-seated assumptions we make about how the world works, every unpaid association role is a volunteer opportunity. When it comes to board service, however, this belief is both untrue and unhelpful. Associations cannot fill their board seats with just anyone who signs up. The selection of directors and officers is (or should be) an intentional, rigorous, and thoughtful

If you are unable to explain candidly why you want to serve on an association board without including these self-interested reasons, you should stop pursuing a board seat until you reach a higher level of clarity in your thinking.

process that requires board aspirants to have the strongest possible rationales for their candidacies.

As I made plain above, you must locate your intrinsic motivation for seeking board service in something other than the pursuit of self-aggrandizement, status-seeking, or the expectation of achieving an advantage in your industry or profession. If you are unable to offer a convincing explanation of why you want to serve on an association board without including these self-interested reasons, you should stop pursuing a board seat until you reach a higher level of clarity in your thinking.

2. **Why am I one of the best-prepared people to help make tough decisions?** When I first shared this question in a November 2022 online article, I argued, “[p]roviding a clear, compelling, and future-ready response to this inquiry must be a non-negotiable requirement for everyone pursuing association board service in the turbulent twenties and beyond” [emphasis in original.] In just three months following that article’s posting, we saw the explosive and disquieting rise of generative AI, the ongoing exacerbation of the climate crisis, and the continued struggle with ideological division and extremism, just three of the myriad problems boards will need to confront in this decade that confirm the importance of your answer to this question.





While the first two questions are closely related, they address different issues. Knowing why you are seeking board service is essential but not sufficient. You also must be able to support your self-awareness with persuasive evidence that you possess the requisite fitness to serve in a board role. Your answer to this question (and the next four) must demonstrate that you are fully prepared to carry the heavy burdens of stewardship, governing, and foresight.

3. **How do I learn and help others learn?** In the turbulent twenties, the experience of serving on an association board begins with the absolute need for intentional learning. Contrary to our community's orthodoxy, association boards are not omniscient. The developments of this decade's first three years remind us that association boards do not know everything. Our community was caught unprepared for the sudden (yet foreseeable) arrival of a global public health emergency and its follow-on consequences, and we still feeling the effects. As human systems guiding human systems into an uncertain

future, we must accept that boards are imperfect and will always operate with incomplete knowledge.

To validate your potential fitness as an association director, you must be able to show that you have robust learning capabilities, starting with the willingness to confront the detrimental impact of your orthodox beliefs and the humility to concede: 1) what you know; 2) what you do not know; and 3) what you don't know you don't know. Being cognizant of the limits of your expertise and knowledge helps nurture your innate curiosity, which is the energy source that powers the pursuit of disciplined learning and discovery. And since board learning is both an individual and group process, it is also crucial that you establish your authentic commitment to helping your future board colleagues learn as well.

4. **What does stewardship mean to me?** Stewardship is the board's shared commitment to leave the systems for which they are responsible better than how they found them for the benefit of stakeholders

To validate your potential fitness as an association director, you must be able to show that you have robust learning capabilities, starting with the willingness to challenge your own assumptions and the humility to concede...

and successors. Through its use of the word, “systems,” this definition includes both the association and any professional communities or industry ecosystems within which the association participates and from which it benefits. Recognizing their stewardship responsibilities beyond association boundaries is a fundamental belief of fit-for-purpose boards.

Once again, we must question our community’s orthodox beliefs by making clear that it is the work of stewardship, and not leadership, that provides the solid foundation associations need to build fit-for-purpose boards capable of setting a higher standard of performance. As a possible candidate for board service, you must clarify how you think about stewardship, why it matters to you, and how you will make meaningful contributions to your board’s stewardship work.

5. **What is my orientation toward the future?**

The board’s duty of foresight, a term I originally coined in 2014, requires association boards to stand up for their successors’ futures. Fit-for-purpose boards recognize that fulfilling the duty of foresight requires a shared orientation toward the future among all directors and officers as they grapple with a full range of plausible futures, including unfavorable and unthinkable futures. This shared

: You will need to grapple with the dynamic tension between optimism and pessimism toward the future. There is fundamental human need for optimism.



orientation is critical to board efforts to anticipate, adapt, and prepare for the challenges these plausible futures raise.

In thinking about your response to this question, you will need to grapple with the dynamic tension between optimism and pessimism toward the future. There is fundamental human need for optimism. At the same time, the reflexive choice to be optimistic in all situations interferes with the clear-eyed recognition of the wicked problems you will need to confront as an association board director.

6. **What sacrifices will you make for the benefit of your successors?**

In an October 2022 online article, I argued, “As they strive to become fit for purpose... association boards must replace [the] decades-long practice of deferring risk to future humans who have no say in the matter with a thoughtful exploration of the most meaningful sacrifices their organizations will make starting now to reduce the risk exposure and impact their successors will inherit in the years ahead.” [emphasis in original] To put it another way, fit-for-purpose boards must do all they can to safeguard their stakeholders and successors from harm throughout this decade and beyond.



To facilitate your reflections on the question above, I invite you to think about this additional question: what will our successors say about us? This is the preoccupying question of my professional life because it imbues me with a strong sense of purpose that, among other benefits, helps shape my thinking about the sacrifices I need to make to leave the association community better than how I found it. I expect you will find it to be a useful resource to help spark your thinking as well.

Can You Become A Fit-for-Purpose Association Director?

Deep reflection on difficult questions is hard work, and I want to challenge you to make it harder. Do not be satisfied with your initial responses to these six questions. Instead, push yourself to go deeper and do the uncomfortable exploration required to determine whether you have what it takes to become a fit-for-purpose association director.

If the answer is yes, I invite you to adopt my mantra: **association boards must become more**. Association boards must become more than they have been historically, and more than they are today. As a fit-for-purpose association director, you can make important contributions to help your board become more, deliver a real-world positive impact on the lives of the stakeholders and successors you serve, and emerge as the best version of yourself because of the endeavor. [F](#)



JEFF DE CAGNA FRSA FASAE

EXECUTIVE ADVISOR FOR FORESIGHT FIRST LLC IN RESTON, VIRGINIA, IS AN ASSOCIATION CONTRARIAN, FORESIGHT PRACTITIONER, GOVERNING DESIGNER, STAKEHOLDER AND SUCCESSOR ADVOCATE, AND STEWARDSHIP CATALYST. IN AUGUST 2019, JEFF BECAME THE 32ND RECIPIENT OF ASAE'S ACADEMY OF LEADERS AWARD, THE ASSOCIATION'S HIGHEST INDIVIDUAL HONOR GIVEN TO CONSULTANTS OR INDUSTRY PARTNERS IN RECOGNITION OF THEIR SUPPORT OF ASAE AND THE ASSOCIATION COMMUNITY.

JEFF CAN BE REACHED AT JEFF@FORESIGHTFIRST.IO, ON LINKEDIN AT [JEFFONLINKEDIN.COM](https://www.linkedin.com/company/foresightfirst) OR TWITTER @DUTYOFFORESIGHT.

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WHY GOOGLE ANALYTICS 4 SHOULD BE EMBRACED AND NOT FEARED

By Tim Mucha, MS

The transition to Google Analytics 4 is beneficial for marketers. GA4 opens the door to continued tracking while respecting privacy.

The countdown to July 1 is on! When the clock strikes, all standard Universal Analytics properties will stop collecting data and any accounts that haven't transitioned yet will automatically be created in Google Analytics 4 (GA4). But have no fear, GA4 has some excellent new features while keeping some fan favorites all aimed at helping users.

The good news is that for those who haven't begun the transition yet and are hesitant to learn the new version, historical data from Universal Analytics will be available for at least six months – stay tuned, Google will provide more updates in the coming months on the full length of availability.

Why is the transition to Google Analytics 4 good?

While learning a whole new dashboard can be daunting, the transition to Google Analytics 4 is beneficial for marketers. As we see privacy protection laws – think GDPR and CCPA – impacting our ability to accurately track users on social media or through cookies, GA4 opens the door to continued tracking while respecting privacy.

GA4 was built to function in a world with heightened privacy protection by using machine learning to create predictions and assumptions about site traffic and user behaviors based on existing data. The new



consent mode allows marketers to communicate a users' cookie or app identifier consent to Google which then adjusts the Google tags behavior based on the user choices. Consent mode receives user consent choices through cookies or widgets and adjusts the behavior of properties to respect those choices. If a website visitor denies consent, Google doesn't store cookies but sends pings to Google via tag which then lets GA4 fill gaps with conversion and behavioral modeling.

What will be new within Google Analytics 4?

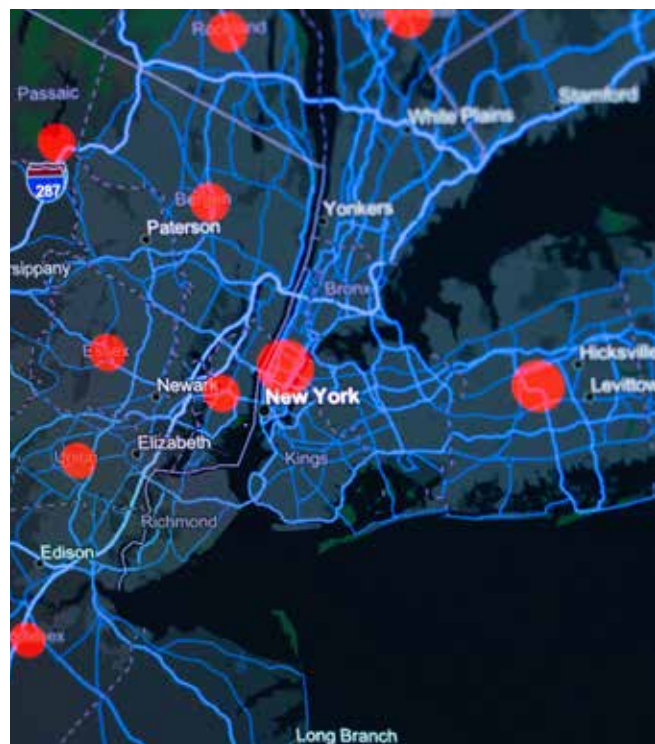
Associations can look forward to new features within GA4. Overall, the dashboard has been entirely revamped and looks cleaner, is easier to navigate and compiles information neatly.



Events and Conversions

Between automatically tracked events and enhanced measurement events, most basic events that associations will be looking to use are already available, however, if you don't see what you're looking for, you can now create new events on the platform. Not only can you create new events, but you can use up to 300 per property. This means tracking for your different levels of membership, education products and more!

Similarly, you can create up to 30 conversions. The best part, it's as easy as toggling the option on once the event has been tracked in GA4.





Custom Reports

If you're a fan of spreadsheets and creating custom reports to match exactly what you're looking for, then GA4's new Explorations is for you! This area is where you can build custom reports that are laid out in a format similar to Excel spreadsheets with tabs that provide unique data. Within Explorations, you're capable of building tables and visualizations with different metrics that provide data on paths, funnels and segments. Last, but not least, your custom Exploration report can be exported as an Excel workbook or printed as a PDF. The Emergency Nurses Association has constructed a custom exploration report and have found it to be insightful.

Anomaly Detection

Google's machine learning and artificial intelligence are doing some really good things. Association marketers can now see anomalies through line graphs that indicate when something should have happened on your website. As an example, if your association is earning \$500 each day for memberships, but didn't – this is considered an anomaly. Now you can look into what caused this anomaly. What's really helpful is that you can set sensitivity and learning period length for anomaly detection.

Overall, new tech and change can be scary, but if used correctly we can take full advantage of the suite of tools Google is making available – for free.

Tomorrow is now, so whether you wait until July 1 for GA4 to make it's appearance for your association, continue reading articles, signing up for courses and experimenting within the dashboard to ensure you're getting as much helpful data as you possibly can. [F](#)

TIM MUCHA, MS

DIGITAL MARKETING
MANAGER

EMERGENCY NURSES
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Overall, new tech and change can be scary, but if used correctly we can take full advantage of the suite of tools Google is making available – for free.

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WANT TO INNOVATE WITHIN YOUR ORGANIZATION? **BE A LEARNING LEADER**

by Erin Huizenga

It's wild out there. Technology, business, and healthcare are all changing. There are expectations on how to balance life and work like never before, and it's sometimes hard to keep up with the abundance of expectations and information that is thrust upon us.

Now is the time to lead with learning as a core leadership value. Learning was once seen as an education and development, training, or human resources function, but there is now a responsibility for teams up and down the organization, and for all of us as individuals, to build learning experiences. Learning can

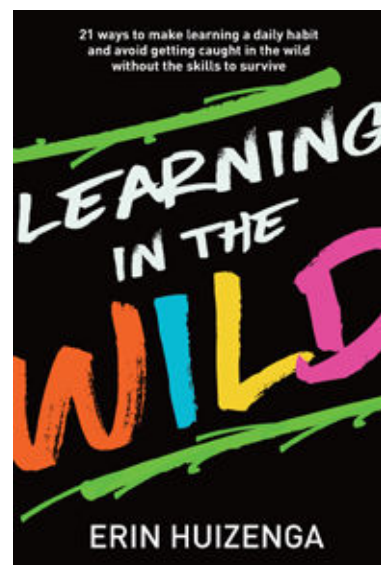
become a branded and strategic benefit for associations and for each one of us as individual contributors.

Why is building learning opportunities for you and your team important? It inspires mental clarity so we can see the full picture. It is excellent for longevity and relevance for you and your colleagues. It's good for employee retention. It provides a sense of ease, flow, and centeredness that we all need at work these days. And perhaps most importantly to an association: it helps teams to be smarter and more well-equipped to solve member challenges and curiosities.



- : Explore how this feels to you to
- : humbly share all you are learning,
- : reading, and taking in each day. Be
- : curious about the people you are
- : with and the places you go each day.
- : Deeply observe what's happening
- : around you.

The American Marketing Association (AMA) contacted Deskligh because they wanted to remain on the cutting edge of marketing education and professional development. Through deep dives with the AMA team, we identified a need for tailored, relevant, and dynamic learning pathways that could support marketers today and prepare them for the rapidly changing future. Using learner insights from research, we developed a comprehensive framework outlining the skills marketers need to thrive. We equipped them with a roadmap and set of tools to activate their subject matter experts to allow for the creation of the new learning pathways for their members.



LEARNING IN THE WILD

BY ERIN HUIZENGA



These are just three of the 21 ideas shared in “Learning in the Wild.” Becoming a learning leader will make you a stronger innovator, build your capacity for ambiguity, and trust in yourself. ■



ERIN HUIZENGA IS CEO AND CO-FOUNDER OF DESKLIGHT, A LEARNING INNOVATION FIRM THAT BRINGS A LEARNER-CENTRIC FOCUS TO INSTRUCTIONAL DESIGN.

ERIN AND THE DESKLIGHT TEAM HAVE HELPED ORGANIZATIONS SUCH AS MCGRAW HILL, SMITHSONIAN, AND AMERICAN MARKETING ASSOCIATION TO DISCOVER LEARNER INSIGHTS AND DEVELOP INNOVATIVE STRATEGIES TO DESIGN IDEAL LEARNING EXPERIENCES. HER WORK HAS BEEN FEATURED IN THE WALL STREET JOURNAL, CRAIN'S CHICAGO BUSINESS, AND FORTUNE, AND SHE HAS BEEN INCLUDED ON CHICAGO INNO'S LIST OF "WOMEN FOUNDERS IN CHICAGO TECH." ERIN HAS TAUGHT AT NINE UNIVERSITIES INCLUDING NORTHWESTERN UNIVERSITY AND THE ID PROGRAM AT ILLINOIS INSTITUTE OF TECHNOLOGY.

So, how can you become a learning leader? In my new book, “Learning in the Wild,” I outline 21 ways to innovate from within. All of these are relatively low cost and free from traditional educational requirements, degrees, and training. Here are just three of the ways to lead with learning:

1. **Identify as a learner**

Simply call yourself a learner. Instead of asking people how they are doing, ask what they are learning. Explore how this feels to you to humbly share all you are learning, reading, and taking in each day. Be curious about the people you are with and the places you go each day. Deeply observe what's happening around you.

2. **Embrace the field trip**

Remember how “Mister Rogers’ Neighborhood” took the kids on TV-based field trips to places like the crayon factory? Why don’t we do this more as adults? It’s a great option for team leaders. If you work with a medical association, what trips could you sponsor for your team so they are more in touch with what members want and need? If you are at a hospitality association, why not encourage your team to stay at a member’s hospitality group so that they can be in better communication with the members from that group?

3. **Build mini learning moments**

The best way to learn something is to teach it. Studies show that our attention spans are decreasing by the day due to exposure to extreme amounts of content and burnout at work. Why not try introducing a new system for learning outside of traditional professional development? Everyone has something to learn and everyone has something to teach. Innovate from within by creating peer-to-peer micro learning moments.



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HOW DATA IS CHANGING THE LANDSCAPE FOR HEALTHCARE ASSOCIATIONS

By Kim Kelly, CAE

“Data is the new oil.”



KIM KELLY, CAE

EDITOR-IN-CHIEF
ASSOCIATION
FORUM,

OWNER,
KIM KELLY
CONSULTING

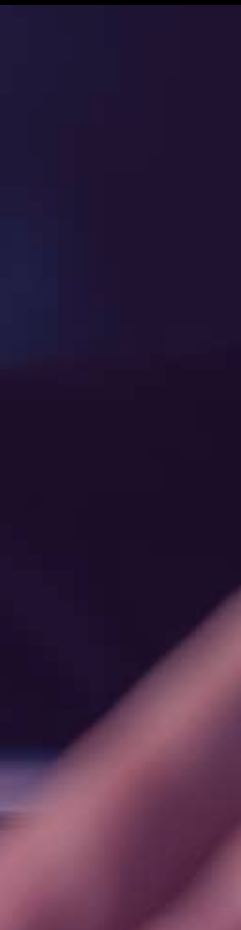
This phrase was coined by Clive Humby, a British mathematician, in 2006. Some experts argue that data is actually the world’s most valuable resource, not oil. Like oil, data is not valuable in its raw state, but rather when it is gathered quickly, accurately, and analyzed (or refined, if we’re sticking with the oil metaphor).

Associations have always collected data, but traditionally it’s been in the form of membership information or event data—meaning everything from registrations to post-event surveys. The data associations collect is often used for planning purposes, goal setting, and marketing. But associations have an opportunity to do much more with data. This is especially true for healthcare associations.

“Now, more than ever, associations have an opportunity to leverage data in an innovative way. This can help them create new product offerings that add value to their members;

create new revenue streams; and drive their missions forward,” says Sonal Chandler, MIT, PMP, CSM, partner at BData, Inc.

She explains that everything—from a visit to the doctor, to wearable technology, to health insurance claims—generates data. While this amount of data can feel overwhelming to unpack, BData sees it as an opportunity. The young company works with healthcare associations to analyze their own data and draw from other healthcare data sources to create products and insights for members. “Having a ton of data being collected from various sources allows you to paint this



holistic picture of the patient's journey and all the different types of care they've been provided," says Chandler. "Despite significant advances in healthcare data connectivity we still see challenges around connecting a patient's longitudinal data—data that basically tells the history of their care—and detailed clinical data," she explains. This is where she sees healthcare associations stepping in to rallying their membership around patient registries and other data-centric offerings.

Data is changing the landscape of healthcare, and associations have an opportunity to play a key role in what that change looks like. Associations are first and foremost beholden to their members. For healthcare associations, that means understanding the challenges that their members face when providing care, looking at outcomes, and improving the type of care provided. Leveraging data is a way to close that gap. One example of this use of data involved the American Burn Association (ABA). The ABA established the National Burn Repository to facilitate the improvement of patient care. In the past, this repository was populated with data from disparate platforms offering limited flexibility and varying quality, with no central point of access for members. "BData's team worked in partnership with ABA staff and volunteers to develop a burn care registry platform that is easy to use and generates reports that will ultimately

help our members improve the quality of care to patients," says Kimberly A. Hoarle, MBA, CAE, executive director, American Burn Association in a 2021 case study about the project.

Through collaboration, ABA and BData created a cloud-based solution called the Burn Care Quality Platform (BCQP). This platform identifies, collects, curates, and analyzes healthcare data. Importantly, this system provides ABA members access to interactive reports and enables them to evaluate their own facility performance against national benchmarks. BData states that "the platform is robust enough and offers modules that support activities such as accreditation and risk modeling, including workflows to help ensure high quality patient care."

This is just one example of how data can be leveraged to meet an organization's mission. Chandler also acknowledges that data can be used as a revenue stream—which is top-of-mind for all associations as they look for ways to diversify both revenue and product portfolios. Associations can use data to engage various stakeholders such as researchers, providers, or life science companies. Not only does this boost member engagement, but also creates opportunities to have dialogue between these stakeholders, as well as promote a sense of community. Another key factor to using data is an association's value proposition. Associations face more competition for producing value than ever before. Gone are the days when members can only access quality education and conferences through a professional association. By investing in a data strategy that aligns with an association's strategic plan, associations can offer new value to members. This could be through a robust data registry like the ABA offers members, or it could be through cutting-edge research using data.

Associations also have the opportunity to act as custodians of data by providing governance, organizing the data to support quality measures within a clinical space, and





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developing clinical practice guidelines and disseminating information to patient and care provider communities.

Data security is often a barrier that keeps an association from embracing data. Chandler stresses that partnering with a firm like BData, who understands data security and how to navigate it, will help alleviate some of these challenges. Rallying board members to realize the value of data is another challenge that Associations often face and why BData has developed tools and processes to help associations leaders successfully develop data strategies with supporting business cases.

Data can feel overwhelming for many organizations and understanding how to get started can often be an association's biggest hurdle. "You need to think about data as a journey that, over time, will add value to your members and organization" says Chandler. "I think the question for an association, especially in this post-pandemic era, is: as an organization what are you doing to continue to stay top-of-mind with your members and relevant within the clinical space that you serve?"

Many associations don't have the internal resources to dive deep into this type of data, let alone build products leveraging both member data and other data sources. Chandler would argue that this shouldn't stop you from pursuing data projects. There are more vendors in this space than ever before, and they can help guide your association through data collection, analysis, and innovation. The first step is embracing big data and the value it can bring to your organization. [E](#)



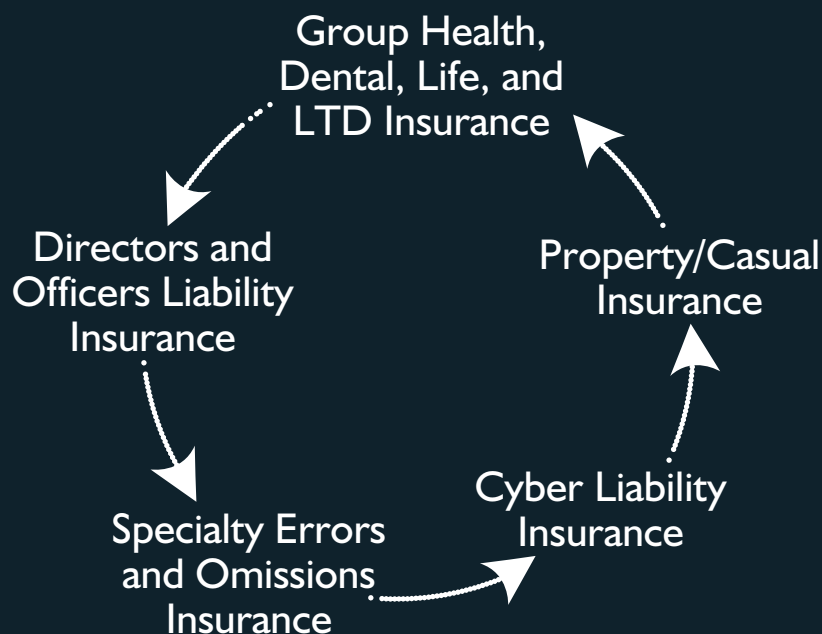
HOW CAN AN ASSOCIATION EMBRACE DATA?

FORUM Magazine has written about embracing data in the past. If you are looking for more on this topic, visit [FORUMmagazine.org/ditch-data-discomfort](https://forummagazine.org/ditch-data-discomfort). Below are steps outlined by BData to help healthcare associations embrace data:

1. Start by getting your board and leadership committed around the idea of embracing data by educating and developing a data business case.
2. Investigate where your organization falls on the Data Maturity Matrix. BData has designed a matrix specific to associations.
3. Work with an expert who can help you integrate data into your strategic plan and build a roadmap to support this vision.
4. Inventory existing data and create a plan to understand other data you want to capture and how your association can leverage it.
5. Find a partner, like BData, that will guide you on this journey and help execute the plan.

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Think of your mentor(s). What about their leadership style has impacted you most? What do you try to emulate?

Not one of us association professionals can say we didn't have a helping hand when it came to career advancement. Whether your relationship with mentors was formal or not, we've all benefited from those who came before us. Perhaps it was an exceptional boss who gave you more than constructive feedback, but also offered practical career advice. Maybe it was a peer whose drive and dedication to their career inspires you. The association management profession is full of mentors and mentees. We're a tightknit community of helpers.



"Over the seven years I have been with ASA, one admittedly unexpected outcome for me is how much exposure I would get to so many different types of leadership styles.

I truly value all the candid, fun, serious, smart, and sometimes challenging conversations I have with our physician members, as these are pathways to my personal and professional growth. With the stuff anesthesiologists regularly deal with in the operating room, for example, they are still incredibly kind, empathetic, funny, and patient. Drs. Michael Champeau, Brian Cammarata, Crystal Wright, Kraig de Lanzac, Mary Dale Peterson, Ori Gottlieb, and Elizabeth Rebello are just some who I know I can count on for true collaboration and honest problem-solving discussions. They and many others view staff as project team members and have high levels of expectation, which pushes us to be our best."



• **Kim Ellison, MNM, CAE**
• Governance Manager,
• American Society of Anesthesiologists



"What makes a great mentor? Someone who is kind and approachable. Someone who lifts you up just because. Someone who turns mistakes into teaching moments.

I was lucky enough to work with a wonderful mentor, friend, colleague, and boss who possessed all of these qualities. The positivity that exuded out of this amazing woman was infectious and always motivated me to go above and beyond. Mentor-mentee relationships can be so impactful when they are based in mutual respect and I often think about how I can pay it forward and be a leader in the same way."



• **Madh Carson**
• Director Corporate Relations,
• Association of Nutrition &
• Foodservice Professionals



"I am drawn to mentors that are confident in taking the lead and doing what is necessary to get the best outcome. That includes not being afraid to fail – as I've been told by multiple mentors. Without taking the risk and trying new things, there is no room to grow. This type of encouragement allows me to work knowing I have the support I need to be creative and confident in my own work."

• **Larisa Sutton, CAE**
• Senior Specialist Member Engagement,
• American Hospital Association

My Association Leadership Journey

When Kim (FORUM editor-in-chief) asked me to contribute to the topic of Leadership at Every Level, it got me thinking about my own professional journey and some pivotal moments along the way. Plus, reflecting on the past and planning for the future are timely themes for someone who is (gasp!) approaching half a century.

I spent a good chunk of my twenties working for a small association, Delta Sigma Phi, which was a fantastic opportunity to try on a lot of hats. Some, like the opportunity to build, facilitate and grow educational programs fit great! And some, like the opportunity to supervise eight direct reports, were a Stetson—that's more hat than I could pull off. During this period, I also built a solid relationship working hand-in-hand with a first-time CEO. Watching him lead the staff and board got my wheels spinning about whether a CEO job could or should be part of my journey.

Most of my thirties were spent at a larger scientific organization, the Institute of Food Technologists. IFT provided me the opportunity to lead larger product portfolios and engage with a more diverse group of members and volunteers. I was fortunate enough to be supported by a supervisor who encouraged risk, and I remember being thrilled and terrified to lead opening remarks at one of our conferences. Could any of the C-suite execs in the audience see my trembling from the stage? If so, they were kind enough to not mention it.

At IFT, I also observed a fascinating career transition that I reference often in career pathways discussions. Over the period of several years, one of my colleagues successfully advocated to transition from a director, to a manager, and ultimately to a coordinator position. My colleague's rationale was they had reached their desired level in their career, their condo was paid off,

and they wanted a change in their level of responsibilities while still being a meaningful contributor to the organization. As someone who was struggling with both internal and external expectations to climb to the next rung of the ladder, that was and continues to be, a powerful lesson about advocating for what's right for me. And that's not always about titles.

Pivoting my career to consulting four years ago has provided a whole new world (Aladdin earworm—you're welcome) of leadership opportunities. Leveling up to match the extraordinary talents of my colleagues was my first challenge—and that's not a shameless plug for our team at McKinley Advisors or a knock on any of the wonderful and talented people I've worked with over the years—it simply was. I'd been coasting for a few years and that wasn't going to cut it anymore.

Leading my first strategic planning project, leading my first presentation with a board, leading my board presentation with a very difficult board—there have been plenty of challenging and exciting firsts. And the companion reward for those firsts is watching one of my client associations change the world for the better and knowing I've been a part of that, even if it's been through leadership behind the scenes. Finally, with greater self-awareness in my forties, I've found more joy in the opportunities to pay it forward. To coach and make space for what I used to be—a young professional. Of course, as a former sketch comedy performer, I'm not going to give up the stage ALL the time, but we've got a great ensemble going on here.



GEORGE AND HIS HUSBAND JERRY ON A RECENT TRIP TO SAN DIEGO.

ABOUT GEORGE MILLER, MS, CAE

GEORGE IS A PRACTICE DIRECTOR AT MCKINLEY ADVISORS AND THE 2022-23 CHAIR OF ASSOCIATION FORUM'S CONTENT WORKING GROUP.

I wonder what leadership lessons the next half century is going to teach me. 📖

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