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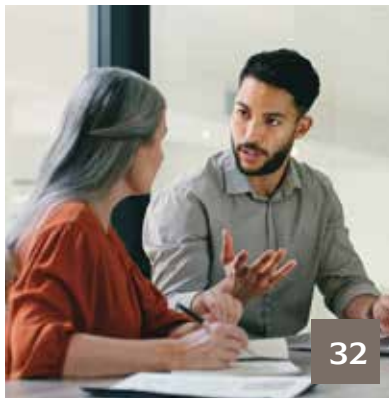
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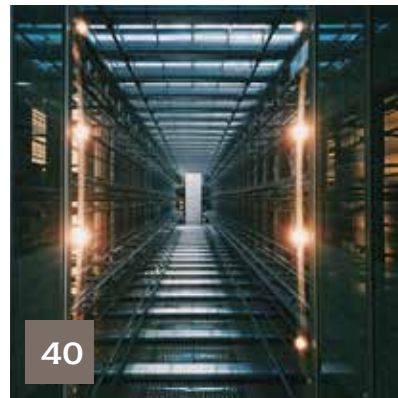
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LETTER FROM THE CEO

Incubation Starts With **COLLABORATION**



Incubate. When we came up with the theme for this year's Holiday Showcase, we were all abuzz about what it could mean for our members. We talked about testing new ideas, challenging assumptions, providing resources and networking and opportunities. And there it was: Incubate.

With a background in technology, the idea of an incubator is both familiar and appealing to me. A tech incubator is a way for bright minds to work together to turn ideas into reality. That's exactly what we aim to do at Holiday Showcase and within Association Forum year-round.

To us, members are the startup—buzzing with ideas and possibilities. Association Forum is your incubator. We are here to connect you to experts, resources, mentorship, and all the support you need to achieve your professional goals.

This is why we've homed in on three themes to guide our content: New Power Leader-

ship, Tomorrow is Now, and Intrapreneurship. These themes are intrinsic to startup culture and the skills needed to incubate new ideas. We've woven them into our content this past year—in this magazine, in our webinars, and in our live learning. Holiday Showcase offers sessions and activations on the Exhibit Hall featuring each of these themes. But more than that, the entire concept behind Holiday Showcase Incubate represents a culmination of the themes at work.

As CEO, I think a lot about my role in this ecosystem. I get to lead this organization, but I'm also a peer to members. We share an industry. As for incubating ideas, I recently read an article written by Akhilendra Rai on LinkedIn titled "The Vital Role of an Incuba-

tion Manager in Building a Strong Startup Ecosystem.” Rai is an entrepreneur and advisor to Smart Cities Incubation Centre. In this article, he lists seven tips for an incubation manager. I’ll speak to two that resonated with me:

Foster a collaborative environment.

This tip strikes at the heart of New Power Leadership. New power leaders don’t depend on hierarchies to manage, but rather build collaborative teams. Problem solving, troubleshooting, and ideation are all accelerated by collaboration. What’s more, intrapreneurship can only thrive in a safe, collaborative environment. This includes creating psychological safety—a place where staff are comfortable challenging assumptions (see page 22 for more on that) and don’t fear failure.

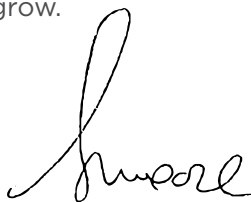
In many ways, fostering a collaborative environment is the entire job. It’s your job too. What are we as membership organizations if we aren’t fostering collaboration? It’s core to our purpose and core to the incubation of ideas.

Continuously learn and adapt.

There are few things I enjoy in life more than learning. Just ask my staff who receive a steady stream of article links and book suggestions from me. Yet, consuming information isn’t enough to learn and adapt. I find that being in a room with smart people who have knowledge and experience different from my own is the best way to learn. Rai writes that “this requires you to be open to feedback and willing to experiment with new approaches.”

I strive for that type of openness. I believe this requires leaning on a wide circle of peers, mentors, and experts. Luckily, Association Forum is here to help you establish your circle. As a leader, an innovator, a changemaker, you can’t be rigid. You can’t be certain, and you can’t be comfortable.

Change is always an experiment. We’ve made changes to this year’s Holiday Showcase program in the name of experimenting with a new format and deepening the purpose of the meeting. I am leading broad structural changes at Association Forum to bring our new business strategy and value proposition for association professionals at all career stages to life. It’s all an experiment. Like tech incubators, we are learning, adapting, and sharing that knowledge with our community in hopes that we will all thrive in the future. We learn, we adapt, and we grow.



As we close out the calendar year, we invite you to look ahead to what’s next! Make 2024 the year of YOU by participating in these offerings:

Emerging Leaders

Begins Feb. 7, 2024

CAE Study Group

Begins Feb. 20, 2024

Women’s Executive Forum

March 15, 2024

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As part of our efforts to provide a Welcoming Environment® for our members, we are providing a copy of Association Forum's Core Values translated into **Chinese** 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.

我们致力于为成员提供 Welcoming Environment® (友好环境)，作为实现该目标的方式之一，我们在此提供由 Interpro Translation Solutions, Inc. 所译的我们的核心价值观（简体中文版）。

提供友好环境

作为提供友好环境的社区，我们认同“整体大于部分之和”这一理念，积极寻求扩大社区规模和影响力的方法。与我们互动交流的每一个人都会受到欢迎和鼓舞，可以真正融入社区，全面提升自己，并找到归属感。

欢迎创新和高质量

我们乐于尝试新想法、寻求新灵感，无论它们来自社区内外；我们也珍惜每一次改进机会，无论机会大小。我们鼓励开创性的试验并乐见其成；但同时我们也深知何时应该采取制止措施。我们希望能够持续改进。

享受乐趣，积极进取

通常情况下，您与同事共处的时间会大于陪伴家人的时间。因此，我们致力于打造一个有趣、积极、整体环境良好的工作空间。

开放、诚实的沟通与合作

知之为知之，不知为不知，交流学习才能获得新知！所以，有效沟通非常重要。我们应该创建一个可以开放、诚实交流的工作环境，并将打造更好的团队作为目标。因此，我们积极欢迎坦率的交流。我们将紧密合作，为成员创造价值。

负责任感

我们共同负有责任，并希望人们能够以尊重我们的方式提出问题和顾虑。团队互助与合作对工作而言不可或缺，我们彼此信赖和依靠，从而能够快速做出反应，并向利益相关者交付有价值和高品质的服务。

用诚信赢得尊重

我们诚信经营，致力于通过自身工作、人才和专业技能来推动所在社区的发展。我们承诺在协会发展壮大的同时造福环境与社会。



REVOLUTIONIZE event engagement



NIKKI GOLDEN, CAE

NIKKI IS A STRATEGIST AT ASSOCIATION LABORATORY. SHE IS ALSO ON ASSOCIATION FORUM'S BOARD OF DIRECTORS AND BOARD LIAISON TO THE CONTENT WORKING GROUP.

From Start-up Pavilion Success to Tips on Crafting Engaging Session Formats

By Nikki Golden, CAE

Discover how one association reimagined its approach to spotlighting start-ups in order to better connect them within their ecosystem.

Over the past several years, the Institute of Food Technologists (IFT) has featured something at their annual event and tradeshow called Start-up Alley. This brought together numerous small start-up companies within the food technology space. Post-pandemic, the organization wanted to provide more opportunity for these start-ups and elevate innovation, which led them to rebrand Start-up Alley as Start-up Pavilion. The shift significantly grew the number of available slots on the tradeshow floor for these companies.



“IFT is focused on connecting food system communities, and that’s everyone from start-ups to academia to government to large industry,” says Mandy Zaransky-Hurst, IFT’s Senior Vice President of Marketing, Communications, and Business Development. “And when we think about the future of food, it’s all about innovating and connecting people and ideas. To safeguard the future, start-ups are a great example of innovation, and it made sense to offer them a greater platform. No doubt, they are also an incredible source of innovation and inspiration for nearly all who attend our annual event.”

And what was that larger opportunity? A pitch contest.

The revised format brought the community together during the trade show. The contest featured four initial rounds of 90-second pitches, with three start-ups from each round advancing to a championship round. Seeding The Future Foundation, who partners with IFT for the annual Seeding The Future Global Food System Challenge, provided prize money for the winner and two runners-up.

Throughout the competition, IFT selected nearly 25 judges and trained them on the scoring rubric. To maintain transparency, the rubric questions were also shared with the participating start-ups.

Additionally, these start-ups had free access to two coaches and an introductory webinar that outlined how the competition would work.

To participate in the event, start-up companies registered to exhibit in the Start-up Pavilion for less than \$1,000. They received two event passes and the opportunity to participate in the pitch competition.

The initial rounds took place over two days at a small stage within the Start-up Pavilion. Overall, there were nearly 60 pitches in those two days. At the end of Day 2, attendees got to listen to pitch tips and strategies from Bob Jones, the author of the book “The Start-up Starter Kit,” which kept the attendees in the pavilion to hear the announcement of who would move forward. The event concluded with a fireside chat with the founder of



• The revised
• format—a pitch
• contest—brought
• the community
• together during
• the trade show.



Seeding The Future Foundation, Bernhard Van Lengerich, focusing on the impact start-ups can have on building a sustainable future.

These two talks were designed to keep people in the pavilion while the scoring was calculated to determine finalists and winners.



In 2022, IFT hosted 48 start-ups in the pavilion. In 2023, they hosted 86. Over the course of three days, the Start-Up Pavilion had nearly 9,000 people walk through. Next year IFT hopes to have 100 food and food tech start-ups in their pavilion.

"Start-ups are a great example of innovation, and it made sense to offer them a greater platform," says Mandy Zaransky-Hurst, IFT's Senior Vice President of Marketing, Communications, and Business Development.





SWITCHING THE SCRIPT

On some level, the past three years have changed our behaviors and decision-making matrix. Yet, most associations have not changed the way they plan events to respond to those changes.

For instance, most meetings start with logistics, when they should be starting with a question of “what are your goals and objectives and who are you serving?” emphasizes Shameeka Jennings, MTA, CMP, DES, CAE, owner of EventsNoire, a full-service event planning company. Reimagining an event can be challenging, especially if it has become routine or if your members have grown accustomed to specific participation expectations. In order to encourage participation—which requires time away from work—attendees need to feel their needs are being met.

SO, WHERE TO START?

Post-event evaluations, Jennings says, contain some gems that are useful nuggets of information to inform change. If you have a committee whose charge is tied to planning a meeting, make sure you have a process to bring in new voices.

These voices may include diversity in seniority, attendee type, and demographics such as race and gender. Be sure to include other stakeholders such as exhibitors and sponsors while building your committee.

While members come to the meeting for education, networking is also a top reason to attend. There are many ways to incorporate more networking into your meetings, Jennings says. One suggestion is to incorporate more open time in the conference schedule.

In addition to encouraging organic networking, open time can also alleviate attendee burnout. “I have seen a lot of positive reactions to just having the time and space to go back to your room and say good night to your kids or take a phone call,” Jennings said. Furthermore, she has noticed that people “come back fresh and ready to be present in the space they’re in.”

Be sure the submission process mirrors any changes made to session types (see sidebar). You’ll want to outline those session types and what the requirements are for each, allowing submitters to choose a session type and speak to how they’d fulfill the requirements.

Another suggestion is to add a few questions that force submitters to think through their session in more detail, such as how the session will be taught, or submit an outline. She also suggests that creativity always be a part of the scoring rubric.

If you are changing your process in a big way—or trying to get new voices involved in presenting, Jennings suggests hosting a pre-submission call to take some of the mystery out of the submission process and to answer questions anyone might have.

“It’s a scary process,” she said, noting that this can be a barrier to new submissions. She urges organizations to make the process accessible, encourage creativity, and involve staff to help.




: **Post-event evaluations, contain some gems that are useful nuggets of information to inform change.**

There are many ways to incorporate more networking into your meetings. One suggestion is to incorporate more open time in the conference schedule.



EXPLORING NEW SESSION TYPES

- **Unconference:** Facilitate those “hallway conversations” by devoting separate spaces to topics brought forth by the community. These conversations are attendee-driven, though you might consider having a member facilitator to take notes and keep the conversation going.
 - **World Café:** Association Forum used this format at its Women’s Executive Forum™ this year. Attendees are randomly assigned to small round tables. Each 20-minute session is either centered around different questions per session or questions that build over the course of all the sessions. Ask for participants to give a short report on how their table responded to the questions between each session or at the end.
 - **Fishbowl:** Set up chairs in two circles, with four to eight chairs at the inner circle. Those in the inner circle discuss an introduced (maybe pre-selected) topic, and as they wish, they leave, allowing someone from the outer circle to sit down and participate in the discussion. Those on the outside circle are observers of the conversation if they don’t wish to participate.
- 
- **Hackathon:** Introduce an issue that is common to the industry and split into teams to design an innovative solution, leaving time for each group to present their idea to the room. Make it competitive by introducing voting and prizes. Make it more interactive by allowing groups to “yes, and” to build on each group’s idea.
 - **Exciting Start:** Consider the registration area your first chance to impact attendees, who more than likely just traveled to get to your event. Jennings saw this idea from Connect Marketplace, a conference for meetings and events professionals, a few years ago. Use the registration space as a reception with music and some fun, unexpected activities. Jennings has served ice cream and has even brought in puppies. “Traveling is such a bear,” she said, “so just doing something to alleviate that within your first touch point of the conference ends up setting a really nice tone.” [F](#)

It's important to re-evaluate whether or not the current iteration of these events is meeting evolved needs.

Stay tuned for insights on the new ideas Association Forum is testing at this year’s Holiday Showcase® Incubate, including the Tomorrow is Now pavilion and the One Idea Can Change the World stage. We will report on how these and other changes were received, as well as the lessons learned to help further innovation within the association community.





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THE REBRANDING JOURNEY

Honoring the Past
while Looking to
the Future

*By Ewa Greenier,
MPH, MBA, CAE*

Embarking on a rebranding initiative, may include renaming the entire organization, can feel like history is being forgotten. The following article explores the rebranding process and insights from Jennifer Swanson, former QUAD A director of marketing, and Martha Smith, AANA creative director. Both were integral in developing a rebranding strategy for their respective organizations. The goal of those strategies were to maintain the integrity and history of the groups while successfully positioning them for the future.

For some, change is an exciting opportunity. For others, change is uncertainty and challenging. Many associations are rooted in tradition and built on the historical achievements of their founders and members.

Case 1: QUAD A

In 2022, the American Association for Accreditation of Ambulatory Surgery Facilities (AAAASF) completed an extensive rebranding effort in response to its continued growth in the U.S. and abroad. Core to this effort was changing the organization's name from AAAASF to QUAD A, along with an updated brand identity and expanded online presence. Swanson was the organization's director of marketing during this time, and says, "we found ourselves in a position where our name was accreditation of ambulatory surgery centers (ASCs), but the scope of clientele was so much broader. At conferences, office-based clinicians would walk by, indicating they were not part of an ASC. We had to show that we also accredit other facility types such as offices, rural health clinics and pediatric dentistry."

"The name was a misnomer," Swanson continues. "We started off on the wrong foot any time we were outside of the ambulatory space. When I started in 2018, I initiated discussions about this, starting with our CEO. It took a few conversations for the Board to understand that the name no longer aligns with who we are right now. We needed to determine if this sentiment was internal-only or if it extended externally as well." Swanson began the process by conducting small focus groups before any additional resources were dedicated to this project. "I started internal stakeholder interviews with the board of directors, staff, and volunteer leaders delving into our brand's impact, the emotions it evokes, our name, and our positioning within the industry relative to competitors. I also reached out to customer facilities, gathering feedback on the tagline, and gauging the inclusivity of the current name." This initial research provided a solid foundation and affirmed to Swanson that facilities didn't find the name inclusive of their identity. They felt excluded if not classified as an ASC.

Ultimately, the board funded a branding agency and initiated a formal brand study. Swanson interviewed several agencies and



presented her top choices to a stakeholder group, who ultimately selected the finalist. The agency conducted a thorough branding analysis and research campaign, evaluating the organization's identity, name, stakeholder perceptions, and industry positioning. "Engaging an external agency is critical," Swanson advises. "If you don't do that, you're setting yourself up for failure. You do not want to rely on a hunch, as that could be an expensive mistake. Finding an agency with whom you have a good working relationship is key to your long-term success."

While collaborating with the agency, Swanson informed her board of three possible outcomes based on the agency's findings:

1. We can stay the same—we are perfect the way we are.
2. We can take a completely new approach and make a radical change.
3. We can make a slight adjustment that will still honor our identity but also bring us into the future.

The organization chose option 3. For the final rebranding, Swanson states, "It was a slight change, but a very meaningful change. I tried to prepare the board that this initiative is a 'glow up.' We will honor your name and your roots as the physicians that founded it while aligning with the new facility accredita-

tion space. Many stakeholders were already referring to the organization as QUAD A. That quickly emerged as one of two suggestions brought forward by the agency, and ultimately the final one brought before the board. After discussing this option and its rationale, highlighting that it's historically honoring and forward thinking, the board agreed to the change."



"Part of the ease of the transition was not to undergo a full rebrand, but a refresh. Having an agency partner to guide us through the necessary steps and set us up for success was invaluable," Swanson emphasizes. "Our communication approach was strategic. We ensured that our messaging initially reached our internal stakeholders, such as surveyors, leadership, regulators, and others who were close to the process. We began incorporating updated imagery, new hashtags, and social posts with the new look and feel before officially changing the name and logo. This way, stakeholders gradually became accustomed to the changes."

After the soft launch, QUAD A debuted a video with the old logo transforming into the new logo, along with the announcement of the updated name. QUAD A emphasized that it's still the same accrediting organization stakeholders have grown to trust and know, but it is now positioned for the future and here to help you.

"This part was very important," Swanson said. The brand refresh was one part of other technological initiatives occurring at QUAD A, and all communications intended to keep stakeholders informed about what to expect next.

Engaging frontline staff was a priority for Swanson. "From the outset, I ensured that our frontline accreditation specialists, who were handling calls, were informed about navigating the new updates on the website, understood messaging, and were prepared to address inquiries. It's unfair to put anyone on the frontline without this information." Furthermore, leadership and board members were given talking points about the brand refresh, ensuring a consistent voice that conveyed a very thoughtful, well-planned, and researched change.

*: Leadership and board members
: were given talking points about
: the brand refresh, ensuring a
: consistent voice that conveyed a
: very thoughtful, well-planned,
: and researched change.*

Case 2: American Association of Nurse Anesthesiology

American Association of Nurse Anesthesiology (AANA) announced its new name and a refreshed logo, look, and feel for the AANA brand at its 2021 Annual Congress, but work had started long before to evolve the organization's brand. Formerly, the organization was known as the American Association of Nurse Anesthetists.

AANA Creative Director Martha Smith describes the impetus for the change: "A successful rebrand has to start with the membership—it's about the desire to express something about the association in a visual way that speaks to the members." She continues, "AANA's rebrand was successful because it was truly driven by the members,

through a resolution that was voted on and passed at our 2020 Annual Congress. Because it was a member-driven directive, it gave us the mandate to not only update the name, but to think about how our brand shows up for the profession and in the lives of our members.”

Smith says she wanted to take a comprehensive and data-driven approach and start with a fresh perspective. AANA engaged with Vendi, an external agency. “Our vendor really did their homework. They interviewed all types of members, from lifelong members to students, to inform the changes. This process was not cooked up by a few people in a room. It was research-driven to ensure a complete picture of what members need the AANA to be in their lives,” Smith summarizes.

Working closely with the vendor, AANA created a rebranding committee. As logos and ideas were narrowed down, the member rebranding committee was presented options for feedback and selection.

Based on the qualitative and quantitative research, the brand strategy, name change, logo, key and segmented messaging and visual assets were developed. “With the rebranding, we developed a new, more sophisticated color palette. The research and member input came through in the marketing voice and tone, communication with members, and the overall spirit of the brand. AANA as an association positioned itself as a partner on the journey as opposed to a big brother over its members.”

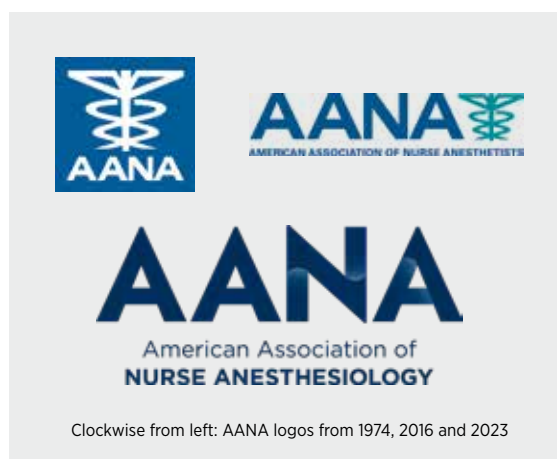
Additionally, a big part of the rebrand was using real members in marketing materials, which allows certified registered nurse anesthetists (CRNAs) and students to see themselves and their colleagues as the face of the organization.

Overall, AANA wanted its members to know that while the branding may have changed, its core purpose remains dedicated to its long-standing history of supporting the nurse anesthesiology profession. The impending name change was public knowledge, but

AANA waited to debut the rebrand visuals until its virtual 2021 Annual Congress. Smith enthusiastically responds, “We wanted to make a creative splash. We created a video that walked the audience through AANA’s origins and history and showed how AANA has evolved over time. This is the latest chapter in making it an association that serves our members. Contextualizing this change as an evolution, rather than change for change’s sake, really impacted how well the rebranding was received.” The AANA rebrand received an overwhelmingly positive reception from its members and won several awards. “It’s not about winning the awards, but about being a winner in the eyes of your members. We’re all glad it was so well received.”

While rebrands target an external audience, Smith’s closing thoughts highlight the importance of also engaging association staff to rally them behind the rebrand and get them excited about how much the organization is gaining. “We rolled out our new logo and name to staff with printed Brand Standards Guides, a lunch-and-learn orientation, a branded Yeti and note of appreciation, and a cool pop-up pen caddy designed in-house. Today, all new staff members receive AANA-branded swag in a welcome box. It’s a very important first touchpoint with the AANA brand because it creates that positive feeling and energy that we want for AANA staff members,” Smith concludes. “We strive to help people feel pride in working for AANA and, at the same time, help members feel pride in belonging to their association.”

: *Contextualizing this change as an evolution, rather than change for change’s sake, really impacted how well the rebranding was received.*




Clockwise from left: AANA logos from 1974, 2016 and 2023



Conclusion

Several themes emerge from these two examples of successful rebranding initiatives:

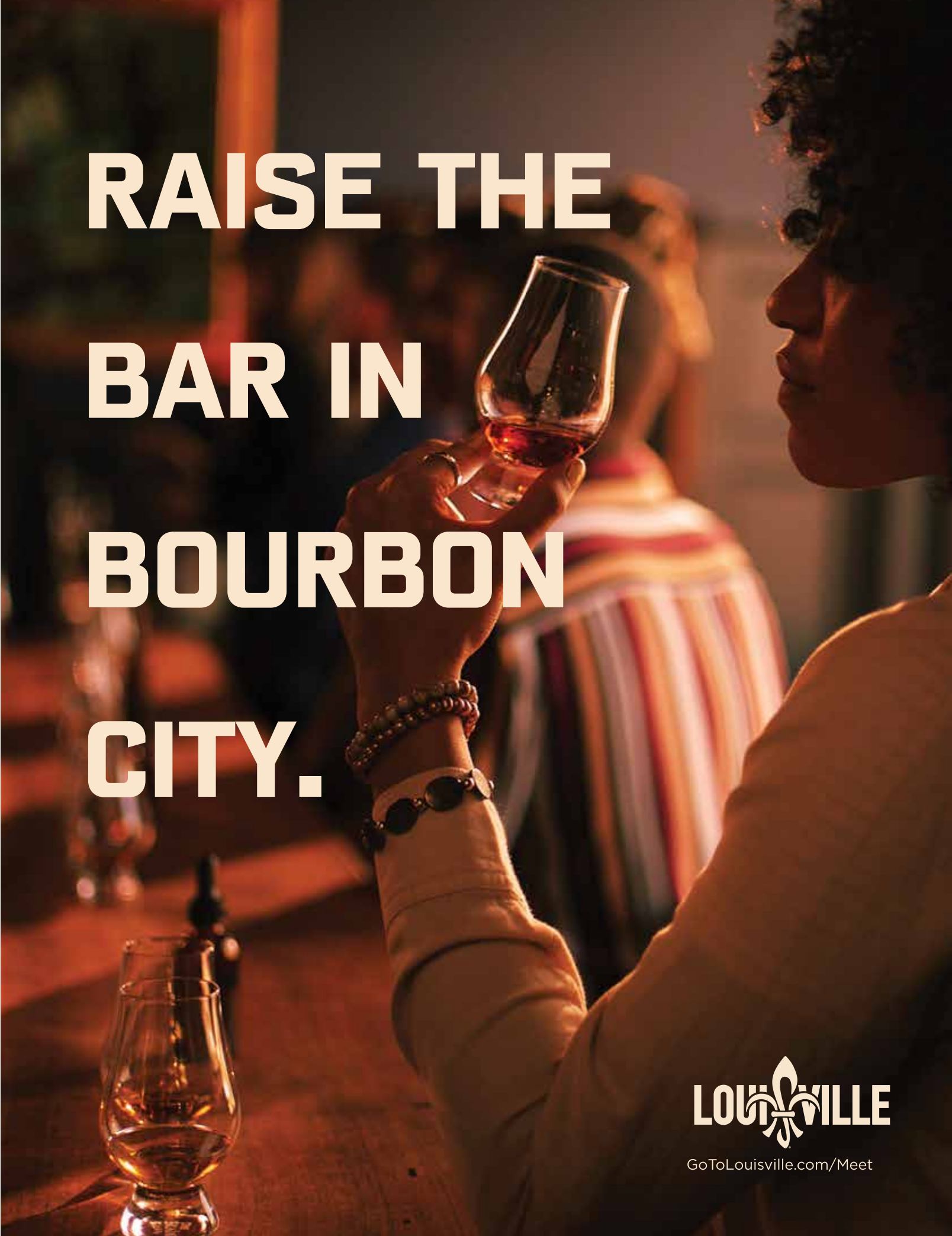
1. **Don't forget the past** – Acknowledging the association's history preserves its identity and values and shows respect for its legacy during the rebranding.
2. **Engage leadership and the Board** – Involving top-level executives and the Board of Directors supports alignment, commitment, and strategic direction for the rebranding effort.
3. **Utilize an external agency** – Collaborating with an external agency brings fresh perspectives, creative expertise, and a systematic approach to rebranding.
4. **Do your research** – Thorough research helps in understanding market trends, stakeholder perceptions, and the competitive landscape, guiding informed rebranding decisions.
5. **Communication is key** – Effective communication throughout the rebranding process fosters transparency, manages stakeholder expectations, and builds support for the changes.
6. **Engage your staff** – Involving employees fosters buy-in, enthusiasm, and a sense of ownership, crucial for successful implementation and integration of the rebranding.

Swanson concludes, "A name change is a very natural progression for a brand. Within the association space, many professionals have undergone similar transitions. Utilize your network, as there are numerous experts available to offer their insights, share challenges and pain points, and describe their success stories." 



EWA GREENIER, MPH, MBA, CAE

EWA IS DIRECTOR OF PROFESSIONAL PRACTICE AT THE AMERICAN ASSOCIATION OF NURSE ANESTHESIOLOGY AND A MEMBER OF ASSOCIATION FORUM'S CONTENT WORKING GROUP.

A woman with curly hair is shown in profile, holding a snifter glass filled with amber liquid. She is wearing a light-colored top and several bracelets on her wrist. The background is a warm, dimly lit bar with other patrons and glasses visible. The text "RAISE THE BAR IN BOURBON CITY." is overlaid in large, bold, white capital letters.

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challenging assumptions

A Data-Driven
Approach to Better
Serve Members and
Organizations

By Alexandra Bradley

Ever had your organization roll out a new member category, introduce a new technology platform, or create a program because staff, volunteers, or board leadership believed it was a good idea?

As association professionals, we often assume what our members and prospects want or need from our organization—without asking them directly. These assumptions can stem from staff, volunteers or board leadership. They're always well-intentioned but they can drive major organizational decisions that can cost thousands of dollars and countless hours of staff time, only to yield abysmal results.

So, how can we, as association professionals and leaders, challenge our assumptions to better serve our organizations and our members?

For Meagan Roloff, CAE, director of member services & engagement at the National Association for Gifted Children, the focus is on challenging assumptions. She emphasizes a data-driven and member-centric decision-making approach.

In both current and previous roles, Roloff has observed board members and other volunteer leaders confidently discussing what members want. These assumptions ranged from costs to project prioritization within the association's overall workplan.

"I often find myself reminding folks that the moment they decide to volunteer—and especially once they become a board member—they are no longer a 'typical' member, even though they may still see themselves that way," says Roloff. "They have a different level of investment in the organization."

Challenging assumptions, especially from board members, isn't easy. However, it is essential. Here are some steps that can help you get started.

STEP 1 Identify the Assumption and Its Importance.

The Illinois Academy of Family Physicians once believed that only those with years of practice experience and service to the organization were ready to join the board of directors. This assumption was challenged by staff and leadership.

“We could see that there was an energy and advocacy spirit among new-to-practice physicians who wanted to advocate and establish policy at the Academy level on a variety of patient care and medical issues,” says Ginnie Flynn, vice president of communications and member engagement.

By addressing their assumption, the Academy was able to identify its relevance to the organization—in this case, the effect on the leadership pipeline, volunteer engagement, and member representation.

For Roloff, it was more concrete. “I saw decline in member satisfaction coupled with a lack of engagement by newer members and members that came from backgrounds other than the dominant one in our association,” she said. “It was clear there was a growing disconnect between the association leadership and rank-and-file members.”

If once you identify your assumption and there is no direct impact on your organization, staff, or members, reconsider its importance. However, if your assumption is clear, and there is a definitive tie to your organization’s mission, vision, or strategic goals, progress to Step 2.

: By addressing their assumption, the Academy was able to identify its relevance to the organization.

STEP 2 Gather your Data. Prepare to Be Wrong.

The best way to combat traditional or historical mindsets is with data. Assumptions are often made from anecdotal evidence. By gathering quantitative data to present to your decision-makers, you can move the conversation from subjective to objective, without making the challenge feel personal.

When I joined the American Board of Foot and Ankle Surgery in January, there was an assumption that our organization needed a Twitter presence. Drawing from more than 15 years in association communications, I also brought my own assumption that our members preferred fewer emails. So, we developed a three-question survey for an upcoming conference with participation from more than 200 students, residents, and practicing physicians.

When asked which social media platforms they used regularly, 66 percent of respondents cited Instagram, 45 percent cited Facebook, and 29 percent cited LinkedIn. Only 11 percent had a presence on Twitter. Assumption challenged.



We also asked how they wanted to receive communication from our organization, including email, text message, social media, website, direct mail, etc. An overwhelming 91 percent of survey respondents preferred to receive information via email. Assumption challenged.

To further challenge her organization's assumptions, Roloff launched a member advisory group. The group was specifically set up to encourage members who might normally hesitate to volunteer. It was also designed to ensure that the full breadth of backgrounds and experiences within the association were represented (gender, race/ethnicity, age, experience, job role, job setting, students, geographic location, etc.).

"When we shared potential messaging, projects, etc., with the group, we always gathered the demographic data so we could segment our analysis. This was helpful in evaluating if a new proposal was resonating with its intended audience or if changes were needed," Roloff says. "It was also key to opening the door for individuals from under-represented backgrounds to engage with and feel ownership within the association."

Feedback from the group provided an extra layer of context to board, committee, and staff decisions. In one example, the conference team tried to get more creative with swag items for an upcoming conference, so Roloff shared the options with the advisory group. "One item got a strong negative reaction from the advisory group because of some context within the profession," she notes. "As staff, we never would have known and could have made a misstep." Assumption challenged.

*: Feedback from the group provided
: an extra layer of context to board,
: committee, and staff decisions.*

STEP 3

Take Action.


Data without action means nothing. If you have gone through the process of identifying your assumption's importance and gathering data to help make your case, it's time to create a plan. Consider goals, actionable items, and timelines. Recognize your limitations and set deadlines. Identify key stakeholders to take ownership of execution.

In response, the Illinois Academy of Family Physicians changed their bylaws, including adding two new physician members (defined as any physician who is within his/her first seven years of practice following completion of a family medicine residency) to the board, with staggered two-year terms and the right to vote. Then, they could continue with a three-year board term and feel confident running for executive positions after that. As a result, the organization's past three presidents were 40 or under during their term and remain active in the Academy.

Staff and leadership have also developed resources for new physicians and parents. "These webinars and resources provide guidance and confidence to younger members so they can continue with their professional interests while growing their families," adds Flynn.



Regardless of your organizational position, you can take small steps today to better meet your members' needs and influence the trajectory of tomorrow.

"As staff, we are the best equipped to be the voice of the average member in the board room and in committee meetings. It is our responsibility to help volunteer leaders zoom out from their personal contexts and think in terms of the entire organization," Roloff concludes. "Doing the extra work to take a data-driven approach is worth it if volunteer leaders are more confident and informed in their decisions. And who knows, along the way you may unearth some staff assumptions too!" 

Regardless of your organizational position, you can take small steps today to better meet your members' needs and influence the trajectory of tomorrow.



ALEXANDRA BRADLEY

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RECENT STUDY SHOWS Conferences Contribute to Long-Term Sustainability for Host Cities

By Paul Sammartino

We know the general benefits of conferences for host cities and, usually, we think in terms of positive economic impact.

However, there is limited research delineating the short-term and long-term benefits of conferences for host cities. That means there's key information missing that can help justify, retain, and attract conferences as well as what associations can do to maximize the positive impacts, both short-term and long-term, of events.

A recent study, the Conference Legacy Impact Study, conducted by Capilano University in partnership with Destination Vancouver is a big step toward providing those insights. The study reports 47 positive impacts that contribute to long-term legacy impacts. The framework for these legacy impacts were defined using the United Nations (UN) Sustainable Development Goals, allowing the report to identify legacy benefits in a way that could be applied to other destinations beyond Vancouver.

If you're interested in a detailed analysis of all 47 positive impacts and also the methodology of the study, we hope you'll read the complete Conference Legacy Impact Study at the end of this article.



Convention Centre, representing several of Vancouver's key industries and included both returning and globally rotating conferences.

The City of Vancouver

Tucked in on the west coast of British Columbia, Vancouver is a bustling city surrounded by, and intertwined with, nature. With a metro population of 2.463 million, Vancouver is the third largest city in Canada and is a global destination for conferences and meeting events.

The United Nations Sustainable Development Goals

The study uses the UN Sustainable Development Goals (UNSDGs) as the framework for legacy, or long-term, positive impacts on host cities. There are 17 total UNSDGs and they are the heart of a blueprint for peace and prosperity for people and the planet, now and into the future.

The Study's Purpose

The purpose of this study was to:

- Identify the short-term outcomes and the long-term legacies of conferences in Vancouver.
- Compare the outcomes of returning and globally rotating conferences in Vancouver.
- Develop a methodological approach to guide similar studies in Vancouver and other destinations.
- Identify general outcomes for destinations and associations to empower them to undertake studies and host impactful conferences.

The study was done from March to October 2022 and data was collected from five in-person conferences hosted at the Vancouver

The Results

The study was extremely encouraging and found that there are 47 short-term outcomes that positively impact not only the host city, but the region, the country and the world. The positive outcomes are also extremely diverse. Though we usually think of the positive economic impact of conferences, the study shows that positive impacts have the following benefits:

- Economic
- Environmental
- Political
- Social
- Sectoral benefits

Each of the 47 short-term outcomes relate to and, over time, will contribute to the 17 UNSDGs that offer long-term legacy benefits.

: *The
Conference
Legacy
Impact
Study
reports
47 positive
impacts
that
contribute
to long-
term legacy
impacts.*

In general, the results show that in-person conferences, both returning and globally rotating, are highly valuable to both attendees and the destination cities that host them.

Comparing Returning and Globally Rotating Conferences

The study included both returning and globally rotating conferences and it's important to note all conference attendees intend to re-visit Vancouver as tourists. There were, however, some key differences between the two types of conferences.



Globally rotating conference attendees are statistically more likely to:

- Undertake research
- Visit more local businesses
- Extend stay in the destination

Returning conference attendees are statistically more likely to:

- Work with Indigenous populations
- Investment in new projects
- Develop stronger outcomes as the impacts strengthen over time

Key Short-Term Outcomes that Contribute to Long-Term Legacy Benefits

Here we will focus on six of the 47 short-term positive outcomes that are key for Vancouver and the legacy benefits (UNSGAs) they are associated with. The numbering below corresponds with the full report.

1. No Poverty

Both local and international job creation by attendees are a direct economic benefit.

At the Pediatric Orthopedic Society of North America Annual Meeting, 6 percent of attendees created new jobs.

12. Responsible Consumption and Production

Here the study looked for the number of attendees who were found to participate in green projects, challenges, or initiatives.

At the GLOBE Forum, 33 percent of attendees took part in these types of green activities.

15. Life on Land

The key to this legacy benefit is the proportion of attendees that are from the mining and forestry industries.

At the Canadian Institute of Mining and Metallurgy Annual Convention, 48 percent of attendees represented the mining and forestry sectors.

13. Climate Action

For Climate Action, the study looked at the number of attendees developing new public legislation, regulations, or governing plans.

At the World Lottery Summit, 36 percent of attendees implemented new green projects, challenges or initiatives, while 40 percent of attendees developed new sustainable action plans or strategies.



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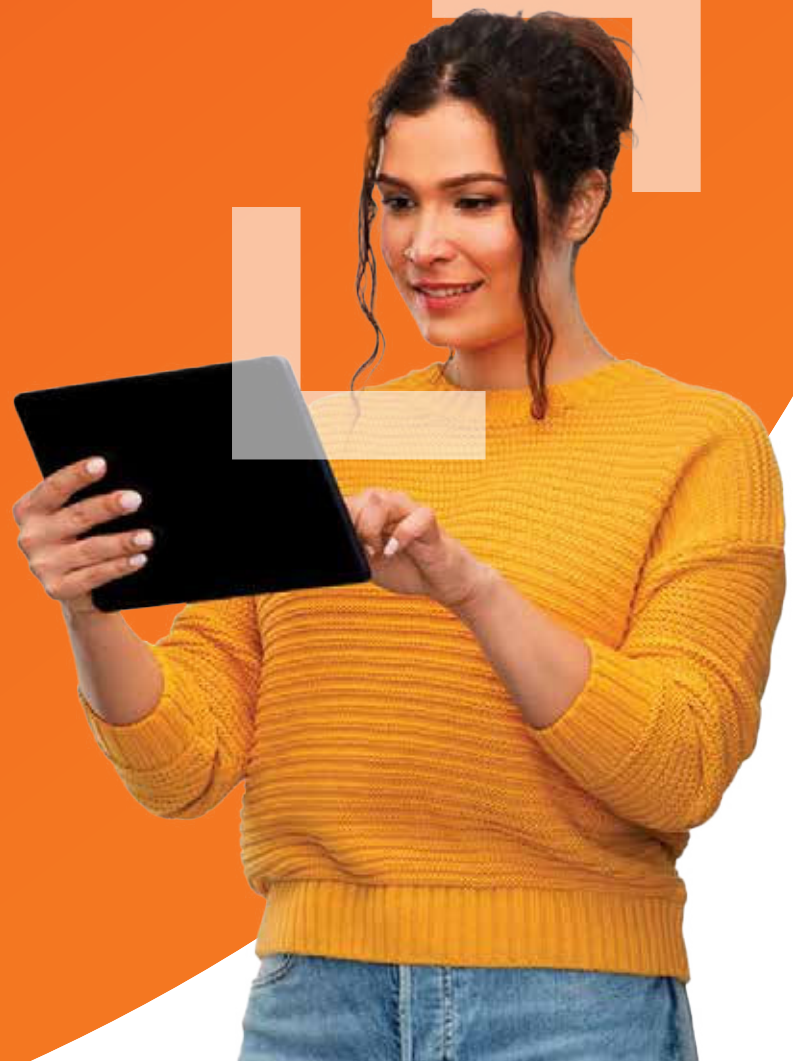
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INTRAPRENEURSHIP

Steve Jobs, quoted above, may be one of the greatest innovators of our time. He transformed industries—personal computing, music, animated films, cell phones. But you don’t have to disrupt an industry to be an innovator. Innovation can happen on a much smaller scale, but still hold profound impact.

At it’s core, innovation is creating something new. It could be as large as a new conference, or as small as a new internal system. The constraints that make our work challenging can actually aid innovation. Nothing gets the creative juices flowing quite like a formidable challenge.

As you read the following pages, think of the places in your job where you can innovate. What changes, big or small, can you bring to your organization?



The Four Needs of Followers:

LEADING THROUGH DISRUPTION

By Tim Hodges, PhD

: Great
: leaders
: consider the
: emotional
: aspect of
: their teams'
: experiences,
: guiding
: them
: through
: challenges.

Ask yourself, “Which leader has most positively influenced your daily life?” Think about them. Picture them. Write down their name. Now, consider what that person contributes to your life. What are the first three words that come to mind?

Like many of the 10,000+ participants in an extensive Gallup research project, a few key themes likely emerge in your answers. Across thousands of respondents, four key themes emerged. It’s likely that many of your answers will be reflected in the themes that emerged from this study. And even if your thoughts diverge, it’s almost certain those you lead probably seek these characteristics in you. At Gallup we call them “the four needs of followers.”



It's important to understand that in times of disruption—or really any time—people are emotionally driven. Many people believe that we are rational, leaning on our prefrontal cortex to make conscious decisions. Yet, behavioral economists have suggested that nearly 70 percent of our decisions stem from emotion, relying on our limbic system. We often make decisions quickly, instinctively, and subconsciously. This explains why when someone slams on their brakes in front of you, you don't have to consider what to do next—you just react! Teams are often the same way. Feelings are facts. Great leaders consider the emotional aspect of their teams' experiences, guiding them through challenges.

TRUST

TRUST is paramount for followers. When discussing trust-building leaders, words like honesty, integrity and respect often come up. How do you build trust? You might be tempted to talk about trust at every staff meeting. That may emulate low-performing teams. On the contrary, high-performing teams don't spend a lot of time talking about trust. They spend their time acting trustworthily. Trust comes mostly from consistent, right actions over time. Leaders are candid, honest, and open about their own struggles and flaws. Leading in this way creates a culture where others can do the same. A crucial finding from Gallup's research is that to earn trust, leaders must first trust others. Great leaders hold focused, frequent, and transparent conversations with their teams. They don't micromanage, but delegate real responsibility and give their teams the opportunity to grow through autonomy and trust.

To foster trust, ask your team, "What task that I currently handhold should you take on or own entirely?"

COMPASSION

COMPASSION is the second necessity. Compassion is a feeling, an emotion, drawing from the Latin roots "pati" (to suffer) and "com" (with). Compassionate leaders recognize their team members' struggles and respond with an authentic desire to help alleviate that suffering. Followers in Gallup's research study also mentioned words like caring, friendship, happiness, and love. A critical element of employee engagement is to have a supervisor, or someone at work, who cares about you as a person. When we have that compassionate and caring person in our workplace, we're more likely to stay on the job, be more productive, and boost engagement and profitability. Great leaders show compassion by being present, listening emotionally and actively, and responding appropriately.

To nurture compassion, ask your team, "Beyond work, what matters to you and why?" This question will show that you care about the whole person, not just the employee, and may take the relationship to a new level.



- : *Compassionate leaders recognize*
- : *their team members' struggles and*
- : *respond with an authentic desire to*
- : *help alleviate that suffering.*



STABILITY

The third need of followers is **STABILITY**. It is exhausting to follow an unstable or inconsistent leader. Especially in uncertain times, stability becomes essential. Leaders who create stability during chaos have a calming effect on their teams. Gallup research shows that managers influence 70 percent of the variation in team engagement. While company culture is important, the most important factor in our day-to-day experience is what happens locally, and our immediate supervisor is in the best position to create that culture. Great leaders establish stability by first understanding the big picture. They then consider their own values and the values of the organization. Finally, they leverage their own leadership strengths and the strengths of their team members to progress.

To instill stability, ask, “What are you clear and unclear about concerning your work duties?” Clarity about expectations alleviates stress and enhances stability.

HOPE

Lastly, followers seek **HOPE**. Hope is the belief that the future will be better than the present, and that you have the power to make it so. Hope begins with a clear goal. Hopeful individuals are optimistic about their goals and understand the associated hard work. They understand that there will be resistance in pursuit of worthwhile goals, and they accumulate the people and resources that will help them overcome obstacles along the way. Hope happens when you have ideas and energy to achieve future goals. Dr. Don Clifton, father of strengths-based psychology and grandfather of positive psychology, once stated, “The more you do what you do best, the more hopeful you are.” Utilizing team strengths during times of disruption and change is a useful, hope-building strategy.

To inspire hope, ask, “What uncertainties do you have about work’s future, and how can I

CONTINUED ON PAGE 52

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6 FAMOUS EXAMPLES OF **Intrapreneurship**

By Kim Kelly, CAE

Intrapreneurship is one of Association Forum's key themes because innovating from within strengthens both individual contributors and the organization as a whole.

We have written about the meaning of intrapreneur, how to promote an intrapreneurial culture, how to become an intrapreneurship, and examples of intrapreneurship in our industry. Yet, you may not realize that some things you interact with every day are the result of intrapreneurship.

Following are 6 famous examples of intrapreneurship.



Gmail

Alphabet, parent company to Google, is famous for offering its developers what's called "20 percent time." The company allows employees to spend 20 percent of their time on "what they think will most benefit Google" according to founders Larry Page and Sergey Brin. The open-ended nature of 20 percent time allows employees to be innovative and creative, tinkering rather than checking off a task list. Many of the company's chief advances have sprung up from this rule, including Gmail. The popular email system was created by developer Paul Buchheit during his 20 percent time. As of 2023, Gmail has more than 1.8 billion active users.

Post-It Notes

Spencer Silver was a 3M scientist researching adhesives in a company laboratory when he discovered a light adhesive that would stick, but not bond to surfaces. The goal of Silver's research was to develop tougher adhesives, but he still couldn't shake this discovery. It wasn't until Art Fry, another 3M scientist was frustrated with paper bookmarks falling out of his choir hymnal that the two happened upon what is now known as the Post-It Note.

The pair initially thought they would create a sticky bookmark, but realized their creation could be far more once they started leaving notes to each other around the office. All the development happened within 3M and the Post-It Note is still an office staple today.



PlayStation

Ken Kutaragi, an engineer at Sony Computer Entertainment, initially met resistance for his idea to create a gaming console to rival Nintendo and Sega. He eventually convinced Sony to fund the project and Sony PlayStation saw instant success when it was launched in 1994. In fact, the system's 3D graphics and immersive gameplay revolutionized the gaming industry. Today, PlayStation is still a main player in the gaming industry and PlayStation 2 is the best-selling gaming console ever.

Amazon Prime

Jeff Bezos was looking for a way to speed up shipping and make Amazon's service so fast that customers didn't think twice about ordering. Former principal engineer Charlie Ward was irritated at the number of clicks the retailer's Super Saver Free Shipping required. Ward planted an idea and Bezos took hold and created a secret team to fast track the project. Prime initially went by the code name "Futurama" and was built by Amazon's best engineers (working around

Today, PlayStation is still a main player in the gaming industry and PlayStation 2 is the best-selling gaming console ever.

the clock) in just six weeks. Many within the company worried that the logistics of two-day free shipping would not work. Others worried that too many customers would take advantage of the program and the shipping costs would sink the company's profits. Yet Bezos pushed hard for the program, which has not only revolutionized Amazon's business, but has also led many other retailers to follow suit.




McDonald's Happy Meal

In the 1970s, McDonald's marketing executive Bob Bernstein was looking for a way to make the fast-food chain more appealing to families. At the time, McDonald's lacked a children's menu, which led Bernstein to create the Happy Meal. Introduced in 1979, the happy meal included a burger or chicken nuggets, fries, and a toy. The toy was (and still is) a huge draw for children. Today, McDonalds sells about 1 billion Happy Meals each year.

- *Jeff Bezos pushed hard for Amazon Prime,*
- *which has not only revolutionized Amazon's*
- *business, but has also led many other*
- *retailers to follow suit.*

Skunk Works

Kelly Johnson was an aeronautical engineer who worked for Lockheed Martin during the Cold War. In 1943, Johnson established the Advanced Development Programs (ADP) which went by the official pseudonym "Skunk Works." A small, secret team, "Skunk Works" is responsible for a number of aircraft designs and highly classified research and development programs. The planes developed under Johnson's leadership included the U-2 spy plane and the SR-71 Blackbird. Johnson worked by what he called "Kelly's 14 Rules," which read like a playbook for intrapreneurship and secrecy. Today, "Skunk Works" has become synonymous with innovative and secret projects. 



KIM KELLY, CAE

EDITOR-IN-CHIEF
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BUILDING A STRONG FOUNDATION:

Unlocking the Power of
Data Governance, Analysis, and
Security for Business Success

By Tobin Conley, CAE and Atabak Akhlaghi

The 35th annual Association Forum Holiday Showcase invites us all to challenge old assumptions and imagine new strategies for building ourselves and our businesses.

The theme of Holiday Showcase is Incubate, which highlights both innovation and evolution. It's a fitting theme for a year that saw the proliferation of artificial intelligence (AI) technologies and a great deal of excitement surrounding the use and implementation of these technologies.

At DelCor, we strive to be innovative. We continually reimagine what it means to be a leader and a voice that associations and nonprofits can trust and look to for guidance. This past year, as we've been envisioning how business will adjust to incorporate AI technologies, it's become clear that now more than ever it's important to remember the fundamentals. Having advanced technology is awesome, but lacking the fundamental requirements to utilize that technology effectively defeats the purpose of adopting it. Garbage in still



equals garbage out. In other words, effective innovation requires a solid foundation. For an association, a solid foundation requires an effective use of data. What you know about your customers—including who they are and what they've experienced (purchases made, events attended, roles occupied, and even web pages viewed)—can help you identify and meet their needs more effectively. But it's not enough to have the data. To truly be able to utilize it you need to be thoughtful about the collection, protection, and application of your data elements.

**: If you're
: looking to
: innovate
: how your
: association
: does
: business,
: visual tools
: are a great
: place to
: start.**

Governance

To keep up with the increasingly data-driven business landscape, your organization needs to have a strategically designed approach to handling data. You need to think about what to collect, how to collect it, and—perhaps more importantly—why you're doing so. Work with key staff members to identify:

- What are the questions we need answered/problems we need to solve?
- What data elements do we need in order to address our questions and problems?
- Do we already have those elements and if so, where do they live?
- How can we put the elements together to tell a meaningful story that answers the questions/solves the problem?
- What can we do with these elements and how do we go about utilizing them?

After establishing what information you need from customers, you need to determine what capabilities your organization has for collecting and recording those data elements and how your staff can gain access to them in order to use them.

Sometimes it may be a matter of making improvements to how your data is integrated across your platforms so that those elements are more readily available to your

staff. Sometimes it's a matter of changing your engagement with your customers so you can collect the right information.

At the same time, it's important to be respectful of your constituents when collecting data. These days we all endure a barrage of questions designed to collect our data through all of the websites we visit and the applications we use. You want to properly communicate with your constituents so they not only provide the data you need, but also understand how that data will allow your organization to better serve them.

Analysis and Application

Having the necessary data elements to support your business is only half the battle. You need to be able to utilize that data effectively to inform your decisions and strategies starting with a well-thought-out data governance framework that defines how you collect, store, and access valuable data elements. You'll also need to identify the most effective way to make that data "speak."

It's important to have staff who are skilled in data analytics to help guide the organization's business strategy. All associations should encourage their staff to have some education in data literacy—an understanding of why having good data matters. But these days we're learning a lot more about the benefits of using a variety of approaches to data analysis.

For example, reports are an excellent way to communicate what the data points to and how that relates to the business decisions the organization is facing. But increasingly, effective data management involves visualizations and dashboards that allow your staff to make data-informed decisions in real-time. If you're looking to innovate how your association does business, visual tools are a great place to start.



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ATABAK
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Security

As you continue to grow and evolve your organization's strategic vision, it's important to continually revisit your organization's cybersecurity posture. It becomes especially important when you introduce new technologies, business processes, and data collection or integration streams. As an organization that collects personally identifiable information (PII) from your members and customers, you are trusted to keep that sensitive information safe from harm. And, it should go without saying, the health of your business also relies on that information being kept safe.

If you don't already have a healthy cybersecurity posture, it is deeply important for your organization to work towards that goal by ensuring the proper systems are in place to protect against attacks. For example, setting up proactive monitoring and management, implementing the right tools to protect your data, and establishing procedures to swiftly respond to threats are all necessary to maintaining a healthy cybersecurity posture.

To protect the weakest and most common link in data breaches, it's necessary to have a healthy training program to make your staff aware of the dangers of mishandling information. Getting staff enrolled in some kind of training (we recommend KnowBe4) is crucial.



First Thing's First

So, while everyone is understandably excited about where the future may take us, it pays to remember that our work is only as good as the foundation on which it rests. In this case, having a solid approach to data management is the bedrock that will support your organization's ongoing technology advances. Paying attention to data governance, analysis, and security will provide the key building blocks that will allow you to take your operations to the next level. [\[1\]](#)

Paying attention to data governance, analysis, and security will provide the key building blocks that will allow you to take your operations to the next level.



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Addressing the AANHPI Leadership Gap IN HEALTHCARE



**WENDY-JO
TOYAMA, MBA,
CAE, FASAE**

WENDY-JO IS
THE CEO OF
THE AMERICAN
ACADEMY OF
HOSPICE AND
PALLIATIVE
MEDICINE.

By Wendy-Jo Toyama, MBA, CAE, FASAE

Using our voice is more important than ever before.

In the wake of the racial reckoning following George Floyd's death in May 2020, I pledged to use my voice on racial justice topics. When six Asians were killed in a Georgia spa in March 2021, I discussed my own experience as an Asian American—something I had never done before. I vowed to shine a light on issues that Asian Americans, Native Hawaiians, and Pacific Islanders (AANHPI) face. Anti-Asian violence is not new but has surged since the COVID-19 pandemic began. From 2021 to 2022, Asian hate crimes increased by 339 percent¹, and attacks on Asian Americans continue.

To support greater representation and inclusion of diverse voices, understanding Asian American challenges is important. We must include AANHPI when considering ways to increase representation, advancement, and belonging for all people of color. Historically, Asians have often been overlooked, excluded, or made invisible.

In a recent Supreme Court ruling on Affirmative Action, Asians were used as a wedge. The model minority myth paints Asian Americans as polite, compliant, and successful due to hard work and talent.² This stereotype is harmful, overlooking the depth and breadth of the Asian American experience and the discrimination against us. It obscures real challenges Asians face and erases AANHPI from discussions about racism.

Allegra Tasaki, communications director of the National Association of Bond Lawyers and member of the AANHPI Advisory Group states, “Representation matters for a host of important reasons we’ve all heard: visibility and role models, breaking stereotypes, diversity of perspectives, improved work place culture, equity and social justice, market relevance (companies/organizations are serving a more diverse population), and a more global approach to conducting business and communications development. But what does this really mean? It means one thing—innovation. That can’t happen without having multiple perspectives represented. It is the ONE thing that this country is built upon; different people from different places (background, physical abilities, geography, etc.) creating, iterating, and evolving new ideas. Without representation, we severely limit and slow progress and innovation.

Data Shows a Leadership Gap

To supplement my experience, I dug into the research. Asian Americans hail from over 50 countries, showcasing diverse incomes, immigration statuses, and education levels. And recently, the Native Hawaiians and Pacific Islanders have been included. The term AANHPI is commonly used, however, the reported data may not be representative of all three groups and often refers only to Asian Americans or a combination thereof.

A recent STAT article titled, “Asian American Doctors Overrepresented in Medicine and Largely Left Out of Leadership,” uncovered the lack of AANHPI representation in medical leadership. More broadly, a recent McKinsey & Company study showed a decline in senior representation of Asian American employees, with Asian women experiencing the greatest decrease. The study further shows that:

1. Two percent of non-profit CEOs and board chairs identify as AAPI.
2. Three percent of Board members identify as Asian.
3. Less than 1% of CEOs, board chairs and board members report as Native Hawaiian and Pacific Islander.

When looking at the American Society of Association Executive (ASAE) membership, AAPIs

constitute only 3 percent of those reporting race, versus 7% of the US population. As a result, an AANHPI advisory group has been formed and has developed a plan to increase representation and advancement at all levels. Karyn Nishimura Sneath FSAE, director of education for the Society of Professional Journalists and a member of ASAE’s AANHPI Advisory Group shared, “Representation matters because WE matter. When we’re not (literally) seen, people often make their own assumptions and stories about why Asians aren’t visible. That can lead to perceptual barriers to membership, engagement, and volunteerism.”

Tyler Eble, president of Association Development Solutions, based in Naperville, Ill. When asked about representation, Eble responded: “Diversity and inclusion are too often discussed at a tactical level as if there are certain metrics that indicate success or failure.” He continued, saying, “This distracts from the value of representation and slows progress. A true culture shift requires a genuine understanding of the range of benefits of having broader representation.”

: A few years ago, we looked at creating an Asian American advisory group at Association Forum. However, when I, as an Asian American woman, scanned my contacts in LinkedIn, I realized that of the 1,000+ connections less than 1 percent of my association colleagues were Asian. I knew only two other CEOs who were Asian American, and both were men. None looked like me.

Words Matter

While many still use the term “minority” to describe people of color, it is a term that evokes a lesser status. It’s also inaccurate in some states. In Hawaii, District of Columbia, New Mexico, Texas, and Nevada³, people of color are the majority. Language continues to evolve, and we need to evolve with it. Currently, ‘historically minoritized and marginalized groups’ is an option that acknowledges what has happened rather than diminishing those to whom it happened. Chicago is the healthcare association hub, There are nearly 2,000 associations headquartered in and around the city, and many of them are healthcare

related. At both trade and professional associations, workforce development is a key area of focus. Many medical associations include leadership development programs, with some targeting diversity.

The term “underrepresented in medicine” (URiM) refers to groups with larger professional representation than in the general population. According to the American Academy of Medical Colleges in 2018-2019, 21 percent of medical school graduates were Asian⁴ versus 7 percent of the US Population⁵. Programs that focus on URiM aim to close the gap for those who participate in medicine at a lower rate than represented in the population. However, these programs might exclude Asian Americans, even if they face discrimination, experience the highest level of micro-aggressions from patients, and hold few leadership positions in medicine. There is a bamboo ceiling, a term that Jane Hyun coined in her book *Breaking the Bamboo Ceiling: Career Strategies for Asians*, which underscores the barriers Asians face as they advance in their careers.

: *There is a bamboo ceiling, a term that Jane Hyun*
 : *coined in her book Breaking the Bamboo Ceiling:*
 : *Career Strategies for Asians, which underscores*
 : *the barriers Asians face as they advance*
 : *in their careers.*

Supporting AANHPI

An Associations Now article during Asian American Heritage month cited three areas of focus to create greater belonging:

- **Policies.** Examine current policies and antidiscrimination, harassment, and microaggression to them. Ensure there are procedures to address and handle issues. Embrace and strengthen diversity and educate others.
- **People and Partnerships.** Create opportunities for special interest and resource groups to meet. Connect AAPIs with coaches and professional partners within the association, industry, and other associations.

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- **Place (workplace culture).** Develop training opportunities to address all behaviors from outright racism to unconscious bias. Invite staff to share what makes them feel safe and invite additional ideas. Regularly assess the culture, collect feedback, and make improvements. People support what they help to create.⁶

I recently co-trained a medical board on boosting board diversity. In preparation, we explored whether board members of color would be willing to share their experiences. An Asian American male board member shared his story with his colleagues. Opening up about his personal experience helped his peers gain a deeper understanding of the challenges he faced. He had not previously shared his experience and his peers were unaware of the prejudice he faced and the hurt he experienced during medical school.

We need to continue to cultivate associations that support AANHPI representation and advancement at all levels. To break the cycle of anti-Asian violence, we need to actively share our lived experiences. His story reminds us of the power of narrative. When we are willing to share our stories and experiences, we learn from each other and broaden our understanding of unseen struggles. 

We need to continue to cultivate associations that support AANHPI representation and advancement at all levels.

This article is part of Association Forum's Healthcare Collaborative initiative. Healthcare Collaborative is made possible by the following supporters:

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¹ <https://www.nbcnews.com/news/asian-america/anti-asian-hate-crimes-increased-339-percent-nationwide-last-year-repo-rcna14282>


² <https://www.learningforjustice.org/magazine/what-is-the-model-minority-myth>

³ <https://theconversation.com/the-us-white-majority-will-soon-disappear-forever-115894>

⁴ <https://www.aamc.org/data-reports/workforce/data/figure-13-percentage-us-medical-school-graduates-race/ethnicity-alone-academic-year-2018-2019>

⁵ <https://www.pewresearch.org/fact-tank/2021/04/09/asian-americans-are-the-fastest-growing-racial-or-ethnic-group-in-the-u-s/>

⁶ https://www.asaecenter.org/resources/articles/an_plus/2023/5-may/how-associations-can-help-promote-aapi-voices-in-management



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Association Forum is pleased to announce the recipients of the 2023 Forty Under 40[®] Program. The recognized individuals represent the nation's top 40 professionals from across the association and nonprofit industries.

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ACTFL, Language Connects

Diane Ziegenhorn, PT, DPT, MHA

American Society of Anesthesiologists

CONTINUED FROM PAGE 36

help boost your confidence?” and “What would you like to be doing differently in the next year that would play to your strengths?”

Consider the four needs of followers: trust, compassion, stability, and hope. Teams seek these in leaders, hoping for reassurance and that they can be part of the solution in these turbulent times. Which of the four needs do you need to focus on? Commit to a personal and team-based improvement action. [B](#)



This article is
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RECOMMENDED READING

“Strengths Based Leadership: Great Leaders, Teams, and Why People Follow” by Gallup (ISBN 978-1-59562-025-5).



SCAN ME



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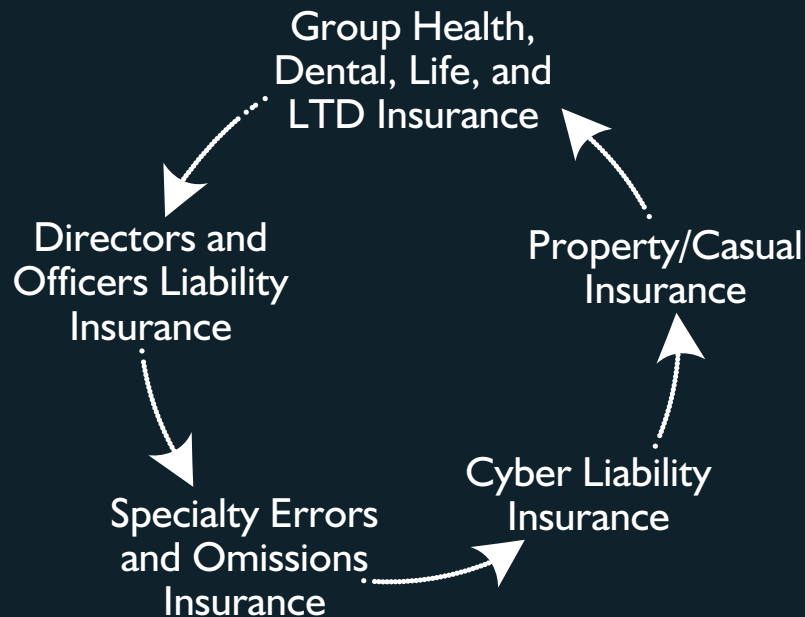
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FTC's Proposed Rule on NONCOMPETE AGREEMENTS



By Susan Feingold Carlson, JD

Q: Is it true that the federal government has or will ban non-compete agreements?

A: Not yet. The Biden administration is considering restrictions on non-compete agreements, but so far, there are no final rules that would do so. That said, the Federal Trade Commission (“FTC”) has proposed a rule to effectively ban most new and existing non-compete agreements, which could be adopted as early as 2024.

In the employment context, a non-compete provision is a contractual agreement that restricts a former employee from working for another employer, or otherwise being engaged with a business, that competes with the business of the employee’s previous employer. Generally, such restrictions are limited to both a geographic area and a set period after the end of employment. In July 2021, President Biden issued an executive order encouraging the FTC to regulate non-compete clauses and other similar restrictions on employees.

In response, the FTC proposed a broad rule (the “Proposed Rule”) that would effectively prohibit non-competes except in very limited circumstances. The Proposed Rule would apply to all workers—including employees, independent contractors, and volunteers – in both high- and low-level positions. It defines a non-compete clause as a provision that prevents the worker from seeking or accepting employment or operating a business after the worker’s employment with the employer.

The Proposed Rule would apply both to clauses that are labeled as “non-competes” and any other provision that would have the same effect. As such, the Proposed Rule also could prohibit non-solicitation and non-disclosure agreements (“NDAs”) if those agreements restrict employment to be tantamount to a non-compete agreement.

: One of the most challenging aspects of the Proposed Rule is that, as currently drafted, it would retroactively prohibit non-compete agreements.

In addition to prohibiting any new non-compete clauses, the Proposed Rule would void and make unenforceable any existing non-compete clauses – no matter when the parties signed them or whether they had been provided in return for consideration (e.g., in a separation agreement).

A final federal rule would supersede any state laws concerning non-compete clauses. While many states have laws limiting the use of non-compete clauses in certain circumstances, only five jurisdictions (California, Minnesota, North Dakota, Oklahoma, and Washington, D.C.), have banned non-compete clauses outright. The New York legislature passed a law banning non-compete clauses in June of this year, but it has yet to be signed by the governor.

The FTC received more than 25,000 public comments on the Proposed Rule. It is difficult to predict what changes, if any, the FTC may make to its proposal in response to the comments received. As proposed, it is such a significant departure from current practice that legal challenges are expected and could delay implementation of a final rule. Based in part on the number of comments received, the media has reported that the FTC is unlikely to vote on the Proposed Rule, or a revised version, until April 2024.

It is worth noting that other action has recently been initiated on the federal level to limit or eliminate non-compete clauses. The National Labor Relations Board (“NLRB”) has published a memo, in which it opines that most non-com-

petes violate the National Labor Relations Act. That memo is not binding, but it suggests the NLRB may be increasing its investigations into non-compete clauses. In addition, the U.S. Congress has reintroduced legislation titled the “Workforce Mobility Act of 2023” (previously introduced in 2019 and 2021), which, if adopted, would ban non-competes prospectively in most circumstances.

It is not clear if, or when, the federal government will ban non-compete agreements, or how extensive such a ban would be. Given the possibility of some action, however, all employers, including not-for-profit organizations, should consider taking the following steps:

- Inventory current employment and severance agreements to determine whether they include non-compete clauses. The Proposed Rule would require employers to notify current and former employees subject to such clauses. Advanced planning would help effectuate that process.
- Identify the organization’s confidential information, including trade secrets, and ensure that proper policies and procedures are in place that reasonably protect such information, including limitations on access and training of employees on how to protect against its theft.
- Consider the use of tailored non-solicitation, non-recruitment, and confidentiality clauses as alternatives to potentially unenforceable non-compete clauses where appropriate. Such provisions often are sufficient to protect legitimate business interests. [F](#)

Edited by Jed Mandel, JD



SUSAN FEINGOLD CARLSON, JD

SUSAN IS A FOUNDING MEMBER OF CHICAGO LAW PARTNERS, LLC. CLP SERVES AS THE ASSOCIATION FORUM’S GENERAL COUNSEL.

CONTINUED FROM PAGE 30

5. Gender Equality

The study looked at the total number of new opportunities created for female professionals.

At the International Spinal Cord Society Annual Scientific Meeting, 24 percent of attendees created new opportunities for female professionals.

5. Peace, Justice and Strong Institutions

The study measured the number of attendees who made connections with public sector representatives.

At the GLOBE Forum, 29 percent of attendees made connections with public representatives.

Key Learnings for Destinations

Given the outcomes that were measured and the relationships between outcomes, the study gives insight into the true value of conferences and offers suggestions for destinations to reap the most benefits from each and every conference. Let's look at some of these values and suggestions.

To maximize tourist activity during and after conferences, destinations should facilitate and encourage conference attendees to visit local businesses.

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For Tourist Activity

To maximize tourist activity during and after conferences (as attendees showed a high desire to return to Vancouver as a tourist), destinations should:


- Facilitate and encourage conference attendees to visit local businesses.
- Support and engage with associations and conference organizers to provide networking opportunities.
- Remember that the more local businesses that attendees visit and the more contacts that are made creates a higher intention to revisit as a tourist.

The Value of Conferences

- Each conference results in many legacies and outcomes. Even one conference will have positive legacy outcomes.
- Results show more than half of the outcomes identified were non-economic (i.e., environmental, political, sectoral, and social).
- Identifying and measuring the legacies and outcomes of conferences will result in exposing this wider range of impacts.

: Each conference results in many legacies and outcomes. Even one conference will have positive legacy outcomes.

Keys to Maximize Positive Impacts

- Build legacy and outcome measurement into conference proposals and bids.
- Provide intangible knowledge to help identify and measure legacies and outcomes.
- Provide tangible resources to help identify and measure legacies and outcomes.
- Be flexible in choosing data collection methods for each conference legacy and outcome.
- Engage different voices in identifying and measuring legacies and outcomes. 



READ THE FULL STUDY

Find the complete Conference Legacy Impact Study to learn more about the methodology and the 47 positive impacts, plus insights, metrics and learnings on the Destination Vancouver website.



SCAN ME



This article is powered by **Excelerate Partner: Destination Vancouver**



PAUL SAMMARTINO

PAUL IS A FREELANCE WRITER BASED IN THE GREATER VANCOUVER METROPOLITAN AREA.

What's One Idea That Changed Your World?

Association Forum has a trademark on the phrase “One Idea Can Change The World®.” We love the concept that the work we do at an association level can have rippling effects across industries. It is empowering to think that a certification program can save lives, an advocacy campaign can save jobs, and a member product offering can save time.

We asked members what idea changed their world. Find out below!

“The big change for me was realizing that in the real world, sometimes it’s not about getting perfect scores. Actually, aiming for perfection can slow things down. I learned to sometimes value B+ work that focuses on progress and speed. In many cases, the gap between B+ and A+ is barely noticeable, if at all. This shift helped me concentrate on the project’s goal instead of endlessly chasing a perfect grade. It’s a lesson that’s been super helpful in getting things done.”



• **Matthew Ryan Stover**
• Chief Creative Officer, Stover Creative Agency



“Kindness. Maya Angelou’s words profoundly hit me: “I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

While the work we all do is so important and will impact people and our world long after we are gone, what matters most is that I am kind, treat others with love, and leave them feeling a way I want them to remember and want to feel myself. Kindness matters deeply.”

• **Michael Tatonetti**
• Founder and CEO, Pricing for Associations

“Understanding I’m not the main character in everyone else’s lives. Not getting an answer? They might not be intentionally ignoring you - they have things going on. A thing we frequently say in my office is, “I’m ignoring you because I don’t have an answer yet.” And that’s ok.”



• **Brandon J. Craig, MPA, CAE**
• Program and Partnerships Coordinator,
• Sierra Sacramento Valley Medical Society

“The one-week sabbatical. A vacation is when you take time off to have fun, rest, relax, visit with friends and relatives. A vacation is for re-energizing but is not for working. A sabbatical is planned time set aside for deep thought on the work you do, whether it is planning what’s next for your company, focusing intensely on a project, or writing that book you’ve been outlining for years. It is a time designed for the work that we don’t always get to do in our daily work flow.”



• **Cecilia Sepp, CAE, CNP**
• Principal & Founder, Rogue Tulips Consulting

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*By Jakeeva J. Lee,
CAE, CIPS, AHWD*

Navigating Association Management: The Sweet Process of Incubating New Ideas and Strategies

When I think of incubation, I think of all the innovations that exist to support our fast-paced world. We have access to curbside services, the option to complete store returns from our cars (Target), and the item you ordered via Amazon Prime at 7 a.m. is on your doorsteps before 3 p.m. All these services are available to accomplish one thing: to expediate our time and convenience.

Recent groundbreaking services in accessibility have completely reshaped organizational processes, and thus, transformed global industries. You can even feel the ripple effect in associations.

Incubation in Association Management

As one can imagine, these new business ventures didn't happen overnight. Someone had an idea to fulfill an unrealized desire of the consumer. The process of idea to reality is incubation.

Incubation in association management strategy refers to the process of nurturing and developing new ideas, initiatives, or projects with the goal of eventually launching them as successful programs or services.

Years ago one of my mentors told me that "in order to hit a goal, start at your end goal and work backwards from there."

I never forgot that conversation and since then, I've been mindful to apply this tactic in a variety of ways. In my opinion, "working backwards" is the critical incubation period.



JAKEEVA ON THE STREETS OF NEW YORK CITY, WHERE SHE TRAVELS TO SATIATE HER LOVE OF LIVE THEATRE AND BROADWAY.

This year's theme for Holiday Showcase is INCUBATE, and as we enter a new year, I'm excited that Association Forum reminds us to challenge ourselves and take time to hatch fresh ideas and concepts.

Embracing Incubation as a Strategic Tool

When I started working at my first association as a member engagement coordinator, I didn't know what I didn't know about the organization. I did know that I was passionate about my role.

Further, I had a curiosity to understand how the organization operated and thrived. That curiosity deepened when I happened across the association's strategic plan.

Woah. How did this relate to me? My role? What did all this mean for the organization?

I dove in and became fascinated with the bigger picture. With my newfound understanding, I started to incubate tactics that aligned with the goals of the organization.

Since then, I always advise those new to the association world to dive into the strategic plan. If you can't locate it internally, ask! I also encourage association leaders to ensure all staff members and volunteer leaders are abreast of the direction of the organization. Empowerment comes when you realize how your work fits into the larger ecosystem. Thus, advancing true buy-in.

Fast forward to last year when I led the first robust strategic planning process for the CAR Foundation, the 501-c3 charitable arm of the Chicago Association of REALTORS®. Input across all organizational channels was necessary to generate creativity and diverse thoughts. We landed at four strategic areas to drive our business decisions and impact. This includes:

- Long term sustainable and transformative community investment
- Aggregator and interpreter of industry research and data
- Strengthen diversified funding sources
- Re-visualization of scholarships

With these new strategic goals, allowing the sweet balance of incubation and innovation to intersect is where our plan comes alive!

How to Intentionally Incubate Your Career

Much like incubating ideas, incubating your career requires both patience and deliberate effort. There's an infamous quote that states "the journey itself is as valuable as the destination."

Here are some key lessons from my own journey:

- **Reflection:** Just as ideas need time to gestate, our careers benefit from regular periods of reflection. I regularly set aside time to examine my goals, strengths, and areas for improvement. This practice helps me align my career path with my values and long-term aspirations.
- **Embracing Failure:** While difficult to digest, I've learned to view setbacks as opportunities for growth rather than as failures. Each misstep is a chance to learn, pivot, re-educate myself and refine my approach.
- **Networking and Collaboration:** Incubating successful ideas almost always involves seeking input and collaboration from others. Building a network of mentors, colleagues, and peers has enriched my perspective and helped me make more informed decisions.
- **Continuous Learning:** Just as ideas and concepts require ongoing research and development (R & D), our careers demand the same. I make it a priority to invest in my skillsets and to stay up to date with industry trends.
- **Take Risks.** The status quo can be the biggest roadblock to progress.

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Navigating Incubation

The beauty of the process of incubation is that it allows you to reset and reassess. We can curate a culture adaptive to change, responsiveness, and continue to proactively shape the future. In 2024, tell me, how will you nurture a new or existing service or product within your organization?! [📖](#)

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