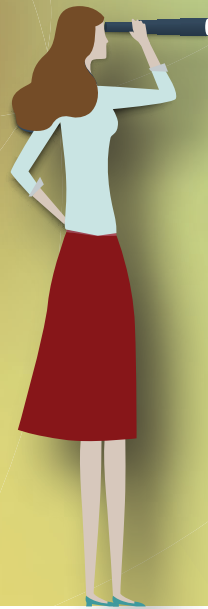


VANTAGEPOINT

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About VantagePoint

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Focus Your Energy for Maximum Impact

by Kathy Raab, CAE, CNAP



Just when I thought I was settling into my new normal and feeling comfortable that I would survive the storm – maybe even come out just a little bit stronger, more confident of my abilities and more educated on the strengths and talents of my staff, colleagues and family – I find myself once again on the verge of quarantining because two family members have COVID symptoms. It's not easy for me to keep the negative anxiety from sneaking into my environment.

As I was rearranging my work area, I came across an article by Mike Koles*, Executive Director of the Wisconsin Towns Association, reminding us of Stephen Covey's *Circle of Concern* and *Circle of Influence* concepts from his 1989 book, *7 Habits of Highly Effective People*. This book seems even more relevant

THE MORE ENERGY WE FOCUS ON WHAT WE CAN INFLUENCE, THE GREATER THE RESULTS AND REWARDS, BOTH INDIVIDUALLY AND FOR OUR FAMILIES, BUSINESSES AND ASSOCIATIONS.

today than in 1989 (okay, it was probably 1999 when I finally got around to reading it).

Covey's idea is that each person, business, association, etc. has a range of things over which they have influence. Your Circle of Concern includes things that

are outside of your ability to do anything about them. According to Koles, "They bother us. They worry us . . . including events, contemporary problems, and even future challenges that might *or might not* actually happen."

With messages about the ongoing pandemic, upcoming election and Black Lives Matter movement all bombarding us on social media, television, radio and print, it's easy to expend precious time and energy worrying about these important elements in our world. And even though it takes a village and all of us need to do our part – please vote and speak up when the opportunities arise – do any one of us have much influence over these concerns? Or are we using valuable resources that could be better used on our "Circle of Influence" instead?

"The Circle of Influence is where our personal, association, business and volunteer efforts can make a real impact," says Koles. "True leaders focus their energy within their Circle of Influence. This circle is always smaller than the Circle of Concern, but it is not static. It is always growing or shrinking based on our leadership capacity and the results that accrue from that leadership."

Chair's message continues on page 6.



Calendar of Events

See the calendar at www.wsaе.org for more information on these events, and to register.

CEO Café: Your Virtual Morning Kickoff Roundtable
December 10, 2020
Virtual

Webinar Series

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Ethics and Inclusion in Challenging Times
December 8, 2020

The Curiosity of Change
December 22, 2020

Ally or Adversary? The Three Secrets to Cultivating Winning Relationships
January 6, 2021

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Diversity Isn't Just for the Boardroom

by Kim Schardin, MBA, CAE

Diversity and inclusion could not be more needed than they are right now. But what is diversity and inclusion? Why does it matter? And how do we achieve it? Often, diversity and inclusion are used interchangeably, but they are very different and both very important.

Diversity – the what; Inclusion – the how

Diversity focuses on the makeup of your environment, such as friends or workforce. Inclusion is a measure of culture that enables diversity to thrive. We must furthermore define bias.

BE SURE YOUR PAY AND BENEFITS ARE FAIR. STOP ASKING ABOUT A CANDIDATE'S PREVIOUS SALARY AND OFFER THE SAME PAY RANGE TO EVERY POTENTIAL EMPLOYEE, REGARDLESS OF WHAT THEY MADE IN AN EARLIER POSITION.

Bias – differential treatment based solely on a difference, such as race, gender or age

Bias is usually subtle and unnoticed by the perpetrators. In the workplace, it starts with hiring.

For example, in a résumé study, applicants with white-sounding names received, on average, 50% more callbacks for interviews than equally qualified applicants with Black-sounding names. Furthermore, the researchers estimate that just being white conferred the same benefit as an additional eight years of work experience!

In response, some applicants *whitened* their résumés. For example, they changed their name or deleted identifiable clubs or activities. This typically increases the callback rate from 10% to 26% for Blacks and from 12% to 21% for Asians. Unfortunately, even the companies with a commitment to diversity failed to diminish the preference for whitened résumés.

Hiring practices fail regarding age, disability and gender, too.

This year, March 31 marked *equal pay day* – the day most women's pay gap catches up to what men made in the prior year. And August 13 was equal pay day for Black women.

Perhaps this is too much for you to change. After all, what can one person do?

Reducing bias in the hiring process

- Remove gender-coded words from job descriptions and postings. Male-oriented titles can inadvertently prevent women from applying. Avoid words such as hacker, rockstar, superhero, guru and ninja, and use neutral, descriptive titles like engineer, project manager or developer. Check pronouns: use s/he or you. Example: *As Product Manager for XYZ, you will be responsible for setting the product vision and strategy.*
- Avoid superlatives such as expert, superior or world class, which can turn off female candidates and limit



the pool because there may be very few females currently in leading positions at *world class* firms.

- Limit the number of requirements by eliminating the nice-to-haves. Research shows that women are unlikely to apply for a position unless they meet 100 percent of the requirements, while men will apply if they meet 60 percent of the requirements.
- Be sure your pay and benefits are fair. Stop asking about a candidate's previous salary and offer the same pay range to every potential employee, regardless of what they made in an earlier position. When it comes to benefits, studies also show that women in particular value robust, family-oriented perks when seeking a new job. This means you should be as generous as possible with family leave, health insurance, remote work and flexible hours.
- Embrace *blind hiring*. Unintentional bias is reduced, whether that bias is based on gender, ethnicity, age or other characteristics that can be assumed by an applicant's name, where they went to school or what year they graduated. And research shows that blind hiring works – making it easier for women and minorities to secure a spot on the short list for interviews, compared to when their names are known to the hiring manager.

Building inclusivity in the workplace

- Make sure company leaders understand that inclusion is about ensuring that everyone's voice is heard, opinions are considered and value to the team is evident.
- Train managers – and hold them accountable – to show that inclusivity is a core competency.
- Form an inclusion council with genuine influence and power.
- Value differences and create an environment where people can feel comfortable bringing their full selves to work.
- Identify underrepresented groups' needs and give them necessary support and resources.
- Provide workers with a safe way to voice their concerns.
- Benchmark key aspects of your organization's culture – and understand the employee experience – before making changes to promote inclusivity.
- Remember that daily interactions are the most telling sign of whether or not your company has an inclusive culture.

Personal bias

But all of this still doesn't address an individual's prejudices. In the word cloud, what words do you identify with? Which ones turn you off? How many apply to your personal life? How many apply to your colleagues?

Expanding your own diversity mindset

Change your routine at least once a month:

- Go to a grocery store in a different location.
- Take a different route when you leave or return home.
- Try something new, such as a new language, clothing style, exercise, lecture series, book, music, movie or TV genre.
- Go to a different restaurant, lunchroom table/ time, gym, place of worship.
- Take a different mode of transportation.
- Walk around your neighborhood, and then a few blocks outside your neighborhood.
- Throw a neighborhood party.

Traditions are comforting, but shake it up:

- Celebrate at a different location.
- Eat a different menu item.
- Learn about holidays you don't normally celebrate.
- Embrace your heritage.

Volunteer:

- Not for just for your kids' school but for something new or in a different community – volunteermatch.org is a great place to start.
- Throw a party at a nursing home.
- Mentor or tutor a child.
- Serve food.
- Build a home.
- Clean up your local park.

Be open to new friends:

- Meet other families with children who attend your kids' school.
- Get to know your colleagues, fellow worshipers, those at your gym or in your classes.
- When you attend a conference, sit at a table with people who don't look like you.

Be observant and challenge your bias by asking yourself:

- What are my expectations of the other person(s)?
- Is there a stereotypical or unconscious bias?
- Can I assume we share commonalities?
- What am I projecting to this person(s)?
- What can I do to change his/her/their assumptions about me?

Always be learning more:

- Brush up on history but be mindful that history books are written by the victors.
- Listen to the elderly.
- Observe and be curious to know more.
- Travel.
- Challenge yourself to understand other value systems or religions.
- Take a bias test, such as Project Implicit. Check it out at implicit.harvard.edu/implicit/takeatest.

Push yourself until it becomes natural. These small ripples will spread out to your family, your friends, your coworkers and your community. And if we model the way, the impact will last for generations. ■



Kim Schardin, MBA, CAE, is an Association Executive for Executive Director, Inc. Kim is a WSAE member, and sits on the *VantagePoint* editorial council.

Chair's message, continued from page 2.

The more energy we focus on what we can influence, the greater the results and rewards, both individually and for our families, businesses and associations.

As we progress into the final months of 2020, take time to visit your current Circles of Concern and Influence. Then determine how and where to focus your time, energy and talents. WSAE is within my Circle of Influence and I appreciate the wealth of knowledge and camaraderie that flows into my personal and professional lives.

Thank you for your support during this unprecedented year. The Nominating Committee has prepared an excellent slate of Board candidates to carry on the incredible, vital work of WSAE. Special thanks to Michelle Czosek and the entire WSAE staff for keeping us focused, balanced and relevant. ■

** Mike Koles is the Executive Director of the Wisconsin Towns Association (WTA). The WTA is a statewide, voluntary, non-profit and non-partisan association of member town and village governments.*




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Strategic Planning in a Virtual World

Creative solutions that move associations forward

by Jeanne Weiss

AMPED Association Management has been in the position to host and execute strategic planning sessions for many associations and non-profits. Depending on the needs of the client, a typical session may last two days, back-to-back and require that leaders and staff travel to meet face-to-face.

So what happens when conditions are such that you can't do back-to-back and face-to-face? The results can be surprisingly awesome!

With the help of AMPED, the United Motorcoach Association (UMA) held its strategic planning session in June 2020, amid the uncertainties of the COVID-19 pandemic. Travel was impossible, so it was quickly determined that a video conference was the way to go.

Using Zoom, UMA leaders and AMPED met for two days, one week apart – a structure that proved to benefit the session as a whole.

Thanks to some extensive pre-meeting preparation by AMPED, the participants kept to the agenda and knocked out the whole of the strategic session in less time than expected. “After day one in UMA’s virtual session, we got as much accomplished as we normally do in-person,” said Emily Petersen, AMPED Chief of Staff and a contributor to the UMA strategic planning process. For instance, she pointed to 15-minute breaks that can easily grow to 30 minutes when in-person. In this virtual setting, the video was turned off and then back on after the break, indicating the session was ready to continue.

With the 2-day agenda nearly accomplished on the first day, there was ample time for discussion on day two. Plus, where participants in a typical strategic session would only have overnight to reflect on the results of the day, holding the two sessions a week apart provided more time to digest ideas, concluding in clearer strategy development on day two.

As noted, preparation was key. In order to build an agenda with a clear focus for the strategic session, AMPED collected data using a variety of methods:

- Interviewed UMA staff to learn what’s working well and what isn’t

- Gathered financial data to better understand operating ratios
- Developed a survey to members and nonmembers asking them to look beyond the pandemic to what they see as most impacting the industry
- Held live interviews with a dozen members to determine the strengths of the organization and areas for improvement
- Benchmarked UMA against other related organizations

WE WERE SO HAPPY WITH
THE OUTCOME. GIVEN THE
CIRCUMSTANCES, WE PULLED IT
OFF WITH CREATIVE SOLUTIONS
THAT WE MIGHT NOT
OTHERWISE HAVE TRIED.

Results from the interviews and survey pointed to common themes that helped steer the planning process. In a typical strategic planning session, that process would involve the utilization of flipcharts and Post-it notes - not something easily reproduced in a virtual meeting.

The advantage of virtual, however, is that multiple AMPED staff could attend without the extra travel costs. More staff meant more expertise and more hands on-deck. When the association leaders separated into three Zoom breakout rooms, an AMPED staff member was there to facilitate and add notes in a prepared Google doc. Petersen monitored the doc and could see instantly the results of each group’s discussion and identify the most common themes. As soon as the breakouts ended, she was ready with organized notes to move the exercise forward — a task that would have taken far more time to complete in-person.

“We were so happy with the outcome of the strategic session for UMA,” said Petersen. “Given the circumstances, we pulled it off with creative solutions that we might not otherwise have tried. And many that we’ll continue to utilize in our strategic planning going forward.”

The end-result of the two-session virtual meeting was broad engagement, a clear strategy to move the association forward, and a happy client. ■



Jeanne Weiss is Creative Services Director at AMPED Association Management. Jeanne is a WSAE member.

Guidance on Revenues From Virtual Trade Shows

by Amanda VanNatta, CPA

Net income received by a tax-exempt organization may be subject to federal corporate income taxation if the income is generated by the performance of an activity that is a trade or business, is regularly carried on, and is not substantially related to the organization's tax exempt purpose. One area of debate has been whether an organization's production of a convention or trade show was an activity that was substantially related to the organization's tax-exempt purpose.

The addition of Section 513(d) by Congress to the Internal Revenue Code settled this debate. The section created a safe harbor from unrelated business taxable income for income produced by "qualified convention and trade show activities" of organizations. With this addition to the code organizations were able to treat income received from such events as not subject to UBIT by virtue of the safe harbor.

ORGANIZATIONS HAVE ESSENTIALLY BEEN PUT IN THE POSITION THAT IF THEY WANT TO CONDUCT A TRADE SHOW IN 2020 IT MUST BE VIRTUAL. LIKELY WE WILL SEE INCREASED INTEREST FROM THE IRS IN WHETHER THESE ACTIVITIES QUALIFY FOR EXEMPTION FROM UBIT.

Section 513(d)(3)(B) defines the term *qualified convention and trade show activity* as a convention and trade show activity carried out by a qualifying organization in conjunction with an international, national, State, regional, or local convention, annual meeting, or show conducted by a qualifying organization, if one of the purposes of such organization in sponsoring the activity is (1) the promotion and stimulation of interest in, and demand for, the products and services of that industry in general, or (2) to educate persons in attendance regarding new developments or products and services related to exempt activities of the organization, and the show is designed to achieve

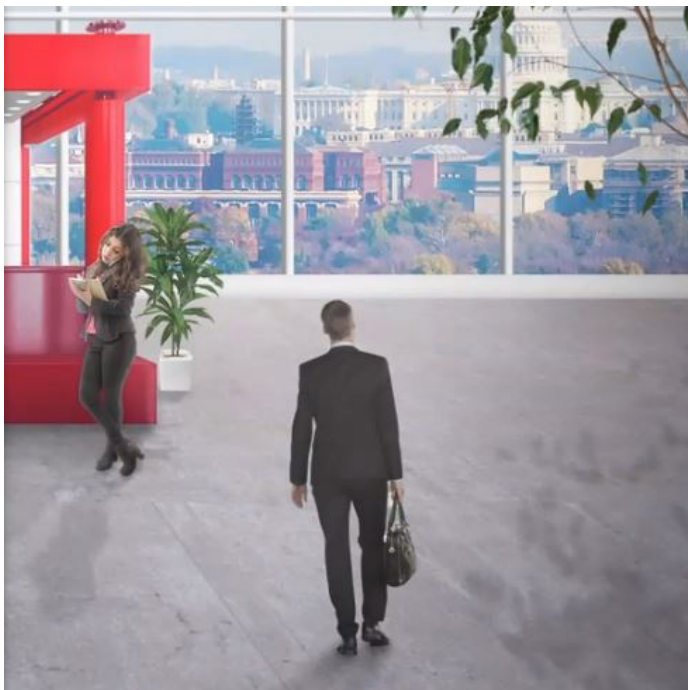
such purpose through the character of the exhibits and the extent of industry products displayed.

Section 1.513-3(d)(1) also provides that the rental of display space to exhibitors (including distributors who are suppliers) at a qualified trade show or at a qualified convention and trade show will not be considered

unrelated trade or business even though the exhibitors who rent the space are permitted to sell or solicit orders.

Qualified trade convention and trade show activity guidance was released in the 1970s. With the advent of the internet, organizations gained the ability to offer *virtual trade shows*. The question then became whether such a web-based trade show is the type of activity that would meet the qualified convention and trade show activity safe harbor.

Revenue Ruling 2004-112 provided organizations guidance as to how the IRS analyzes activities of virtual trade shows and made it clear that a key factor as to whether the income is UBIT or not is if the virtual show is ancillary to a *live* show. In general, if there is no live show associated with a virtual show then the IRS deems the income does not meet the safe harbor provision and thus is unrelated business income to the organization unless they can exempt the income under a section other than 513(d)(3)(B), like as a qualified sponsorship payment. The IRS' reason for this position is that activities that promote demand for industry products and services, like other advertising activities, generally would constitute a *trade or business* under section 513(c) if con-



ducted for the production of income. Section 513(d) is a narrow exception to what constitutes an *unrelated trade or business* under Section 512(a). This narrow exception holds that income received by an organization at its convention or trade show from renting display space may constitute unrelated business taxable income, if selling by exhibitors is permitted or tolerated at the show, however activities described in Section 512(d)(3) are specifically exempted from the definition of an unrelated trade or business because they are conducted by a qualifying organization in furtherance of its exempt purpose and in connection with a convention, annual meeting, or trade show. The term *convention, annual meeting, or trade show* as used in Section 513(d)(3) refers to a specific event at which individuals representing a particular industry and members of the general public gather in person at one location during a certain period of time. Not only must the activities be conducted at a *convention, annual meeting, or trade show*, but the character of the exhibits and the extent of industry products displayed at the show must be designed to stimulate interest in, and demand for, the products and services of the industry in general or to educate persons in attendance regarding new developments or products and services related to the exempt activities of the organization. It is the nature of the activities and their connection to a specific convention, annual meeting, or trade show that distinguishes *qualified convention and trade show activity* within the meaning of Section 513(d)(3) and the regulations from other types of advertising and promotional activities conducted by organizations.

Since 2004 there have been many advances in internet capabilities and what could potentially be done by an organization in a virtual trade show setting. Organizations can live stream informational and educational sessions, can provide networking through an online platform, and can showcase services and products that would generally be done in person. COVID-19 has essentially forced organizations to the internet if a trade show had been planned due to limited in-person interaction and state laws.

There could be a number of factors that the IRS would look at in a virtual trade show to establish the activity as meeting the safe harbor for qualified convention and trade show activity. These include the following:

- The purpose of the virtual trade show is to promote and stimulate interest in, and demand for, products and services of an industry or profession or to educate persons in attendance regarding new developments or products or services related to the exempt activities of the organization.
- The virtual show is designated to achieve the above purpose through the character of the exhibits and products/services on display.
- There is a limited time period for which the virtual trade show is available so that the show can be

interpreted to be a *specific event*. Consider limiting trade show accessibility similar to how the organization would do so with an in-person event. One of the key factors in the 2004-112 ruling was that the availability of the virtual trade show was too lengthy as access to it was open for a period before and after the event, thus, it should be emphasized that limiting access to a short window could be very important for organizations.

- Prominently highlighted in the design of the virtual trade show should be one or more of the following: networking, sales, or education. The virtual trade shows that are interactive with exhibitors and that offer online educational opportunities will be in a better light for qualifying for safe-harbor.
- Historically the organization has provided in-person trade shows and the organization has been able to design and maintain much of the look and feel of an in-person event in their virtual trade show.
- Revenue from the virtual trade show is used to defray the operating cost of such event, and any excess in revenue over this cost is used in furtherance of the organization's exempt purposes.

Unfortunately, in this COVID-19 time the IRS has not issued any additional guidance on virtual trade shows and thus, we must rely on the old Revenue Ruling 2004-112 and attempt to apply that guidance as best we can to this unique 2020 position. Organizations have essentially been put in the position that if they want to conduct a trade show in 2020 it must be virtual. Likely we will see increased interest from the IRS in whether these activities qualify for exemption from UBIT. In the absence of further guidance, the above factors can be taken into consideration by organizations and it should be documented as to whether the organization asserts their activities more likely than not meet the qualified convention and trade show exception. There is no guarantee that the IRS might not take the position that virtual shows do not meet the qualified convention and trade show exemption relying on 2004-112 as evidence of that position, thus, it would be recommended that organizations document to the best of their ability how their virtual event fulfills the same purpose and goals as their in-person event. We then wait on further guidance from the IRS in the virtual trade show area. ■



Amanda VanNatta, CPA, is Senior Manager at Wegner CPAs, a WSAE member.

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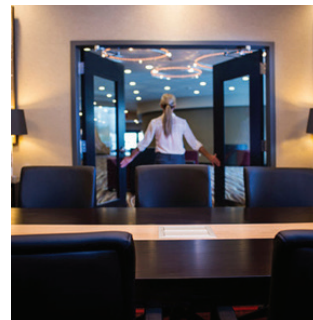
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When Are Employers Obligated to Pay Quarantined Employees?

"Ask the Expert" legal feature

by Ann Barry Hanneman

Q: I have an employee who I am requiring to quarantine for 14 days. Ordinarily, this employee works 40 hours a week while in the office, but I am only able to provide about 15-20 hours of work that can be done remotely during this 14-day quarantine period. Do I have to pay this employee for working full-time during this employer-required quarantine?

A: A few factors need to be considered when answering this question. First, consider whether the employee is a salaried exempt employee and if pay is required under the Fair Labor Standards Act (FLSA) or state law equivalents. Second, consider whether the employee is eligible for pay under the Families First Coronavirus Response Act (FFCRA). I will also address some business considerations you may want to take into account when deciding whether to pay the employee for the time the employee is not able to work due to the employer-required quarantine.

FLSA Requirements. If the employee is a salaried exempt employee, you must pay this employee his/her full salary for the weeks on quarantine, as the employee has worked some hours during these weeks. Under the FLSA, an exempt employee must be paid the full salaried amount for that week, regardless of the number of actual hours worked and the quarantine circumstances won't affect your FLSA obligations.

On the other hand, if this employee is a non-exempt employee paid on an hourly basis, the employee must be paid for all hours actually worked and there is no obligation to pay for time not worked, unless FFCRA applies as addressed below.

FFCRA Eligibility. Depending upon the circumstances, the employee may be entitled to intermittent pay subject to employer approval for the hours unable to be worked if the employee is eligible for payment under the FFCRA, a law in effect until December 31, 2020 applicable to employers with less than 500 employees. So, depending upon

AS THE EMPLOYER, YOU WOULD BE ENTITLED TO A TAX CREDIT FOR THESE AMOUNTS PROVIDED YOU MAINTAIN THE DOCUMENTATION REQUIRED BY THE IRS.

the reasons for the quarantine, your employee may be entitled to be paid 100% or two-thirds of pay for the hours the employee is unable to work due to COVID-19 reasons. If eligible, as the employer, you would be entitled to a tax credit for these amounts provided you maintain the documentation required by the IRS. Information about FFCRA eligibility can be accessed at: <https://www.dol.gov/agencies/whd/pandemic/ffcra-employer-paid-leave>.

Business Considerations. In addition to the above legal requirements, there may be legitimate business considerations you may want to consider. For example, if this employee disclosed that he/she has traveled to a COVID-19 hotspot consistent with your desired policy to assure that employees actually self-quarantine to stop the potential spread of coronavirus in the workplace, penalizing an employee for this disclosure may send the wrong message to employees. Although employers like yourself don't want to reward careless behavior, consider the importance of "disclosure compliance" with the costs of paying for the additional hours.

I hope this provides you with general legal and practical considerations needed when addressing this issue under your particular circumstances. ■

Do you have a legal question for our regular "Ask the Expert" column? Please e-mail mczosek@wsae.org for consideration. Information provided in response to this Ask the Expert question does not constitute legal advice and is intended only to provide general information to assist WSAE members.



Ann Barry Hanneman is an attorney at von Briesen & Roper, S.C. Attorneys at Law, and can be contacted at (262) 923-8652 or at ahanneman@vonbriesen.com. Ann is a WSAE member.

Easy Tech Tools to Position Your Association for Success

by Sherry Budziak

If your pre-COVID self considered the IT department an exotic country you'd prefer not to visit, I'm guessing your view has changed. Technology is the hero of the day. Our personal and economic well-being would have been dangerously impacted without a digital infrastructure. I am urging my colleagues to embrace this new awareness and the benefits it offers. When you put technology at the center of operations, you build a path to opportunity that

- Empowers teams to anticipate customer needs
- Optimizes operations and transforms product offerings
- Engages members through personalized experiences

The array of digital resources at our disposal is astounding. I'd like to tell you that you have the luxury of deciding whether to use these amazing tools or not. But the fact is, even before the pandemic, the pace of business was making electronic efficiency imperative. Advancements in technology and knowledge are doubling every two years. The most innovative groups were already introducing AI newsletters, chatbots and facial recognition at meetings. The pandemic has only accelerated the need to keep up.

THE LOW TOUCH/HIGH SERVICE BUSINESS MODEL IS HERE TO STAY. CUSTOMERS AROUND THE WORLD WANT NEW WAYS TO ENGAGE, SEAMLESS ONLINE INTERACTIONS AND ON-DEMAND INFORMATION. THOSE CUSTOMERS ARE ALSO YOUR MEMBERS. THE ONLY WAY TO BE RELEVANT IS TO DELIVER ON THEIR EXPECTATIONS.

Navigate the low touch/high service future

My personal experience highlights how the landscape has changed. If I want something from Dicks Sporting Goods, or any other store, I buy it online and have it delivered, or drive to the store for a curbside pickup. I've come to expect the kind of service that makes shopping simple—no lines, no delays, no hassle.

The low touch/high service business model is here to stay. Customers around the world want new ways to engage, seamless online interactions and on-demand information. Those customers are also your members. The only way to be relevant is to deliver on their expectations.

The good news is that you don't need to invest in a six-figure AMS to operate more efficiently. By adopting an innovative mindset, selecting the right technology and integrating digital platforms across your organization, you can optimize engagement, people and systems. Following are examples of inexpensive software options that streamline work.

Empower teams

Collaborating and working in the cloud. The associations that made the transition to remote work most easily were already using cloud-based file-sharing platforms. I'm surprised by how many groups have yet to make this transition. *Microsoft 365* is the company's popular suite of online applications designed for use on the internet. Its companion software *Teams* allows for online meetings and file sharing. Nonprofit organizations can purchase these programs at a deep discount. Smaller associations might con-



sider migrating to Google's free, but more basic, online business software.

Project management. When you need to monitor timelines, responsibilities and progress on multiple initiatives, *Wrike*, *Asana* and *Monday* are designed to help teams coordinate and stay on track to complete complex assignments.

Financial administration. If you're looking to streamline administrative functions, *Quickbooks* efficiently handles many of the payroll, time tracking and other financial tasks that might be delegated to a bookkeeper.

Optimize operations

Database management. You won't retain members if you make it hard for them to love you. A good member management system helps to avoid annoying glitches like losing an event registration or failing to record a payment. *Wild Apricot* and *Member365* are do-it-yourself, all-inclusive systems. Both offer event management and dues processing. *Member365* also tracks committees, creates directories and even has add-on education and learning management modules. Cost is based on the number of uploaded contacts.

Hubspot is another of my favorite tools. It is a free CRM designed to track the journey from prospect to customer. The software is extremely flexible and includes robust query, analytic and email marketing functions.

Engage members

It has never been easier for a small shop to look as impressive as the big dogs. There is an abundance of software to help you tell a compelling story.

Newsletter. Is it possible to regularly send your members content they want to see without a team of writers? Absolutely! *rasa.io* uses AI to create customized newsletters based on your constituents' interests. Simply pick the publications you want to draw from and let *rasa.io* do the work.

Video. We all know videos drive engagement. *Animoto* allows you to create professional-quality videos in three easy steps. You can even select music from a licensed library and post your masterpiece to social media. *.orgSource* also gets a lot of attention from the animated videos we make using *Raw Shorts*. This program converts your text to video with AI. Icons, illustrations and voice-overs combine in a message that's both fun to create and to watch.

Graphic design. You don't need an artist, or even a drawing board, to produce images that demand a second look. *Canva* turns a klutz who can't draw a stick figure into a designer of anything from banners and flyers to social media

posts and annual reports. The site includes over 1 million photos, graphics and fonts. If you can't find the image you need, check out *EveryPixel* or *Unsplash*.

Presentations. Using PowerPoint to create a presentation that packs a punch can be both frustrating and time-consuming. These three platforms do much of the heavy lifting and help you make an impact in half the time. *Beautiful.ai*, as the name implies, is a highly intuitive slide generator. The software is based on templates that are easy to customize and includes hundreds of images that add the pizzazz of professional design. Instead of building your next presentation from scratch try some of *SlideModel's* 20,000+ ready-made slides, templates and graphics for an easy start. And, if you struggle to insert and update Excel charts and graphs in your PowerPoints, *Presentation Solutions* makes the interface easy. Up your presentation game in a few quick clicks with each of these robust programs.

Events, meetings and conferences. By now Zoom is a household word. But there are many vendors who provide experiences, ranging from simple meetings to full-blown conferences, that include options for sponsors and combinations of live-stream and pre-recorded sessions. Feel free to contact me (sherry@orgsource.com) for our complete list of virtual conference vendors. Here is a partial list:

- *Hopin*
- *GoToWebinar*
- *Amazon Chime*
- *ReadyTalk*
- *Vimeo*
- *6Connex*
- *Whova*

Innovate, create and have fun

Not only do these technologies save time and resources, they are easy to use, fun and empowering. Encouraging your team to experiment stimulates innovation and creativity. Above all, if your group includes any reluctant tourists to IT country, I hope that using these tools will earn them stamps in their passports. You won't regret making digital literacy a priority in your organization's culture. In the post-pandemic marketplace, technology is the undisputed ticket to success. ■



Sherry Budziak is the founder and CEO of *.orgSource* (orgsource.com), a WSAE partner. Sherry is a WSAE member.



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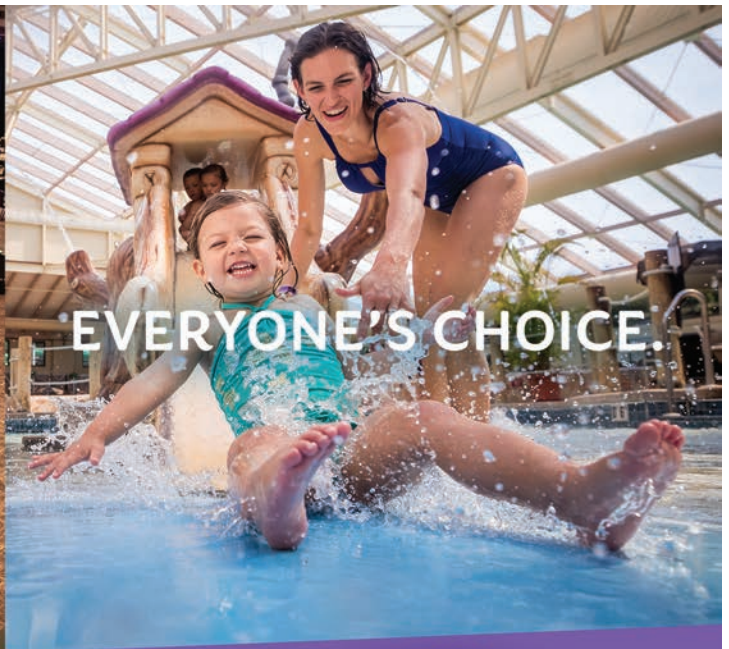
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Speaker Motivation

How to *up your game* when the rules change

by Roger Wolkoff

Have you ever been fired? It's not a great feeling. I'm a professional speaker, and I got fired six times last March. That's when COVID-19 began its initial sweep across the United States. Six events where I was contracted to speak were canceled or postponed within a few days.

Sound familiar? Nearly all WSAE members were similarly affected. You had to scramble to cancel or postpone your events. You were on the phone with members or opening e-mail from them, trying to answer questions that no one yet had answers to. I bet you're still answering questions. You're considering whether to hold a live event, move an event entirely online or use a hybrid model.

Fast forward to today. With a few changes, my business model is stronger now than ever. I have adapted to the changing needs of the speaking, event planning and conference markets. The world changed. To remain successful, I had to change with it. And so did you.

I remain optimistic, hopeful and realistic. I encourage you to do the same. I call on my resilience, creativity and other strengths to fortify my foundation. What talents do you bring to the table? Who has the skills and gifts in your organization you can rely on to deliver?

I continue to network and rely on experts where I need help and inspiration to deliver value for my clients and my National Speakers Association-Wisconsin chapter members. What are you doing to help your businesses and members? Connect with them as often as possible, via emails, phone calls and texts. Whatever it takes. Find out what they want and need from you.

When one door closes, another door opens. My mission, vision and values did not change when the pandemic struck. If anything, they went into overdrive. I still serve the same people, but adapted my business model to meet their changing needs. For example, I moved my program delivery to all digital and online.

BY SENDING MEMBERS DOWN LEARNING PATHWAYS WHERE MARKETING CONTENT AND EVENT PROMOTIONS ARE BASED ON PREVIOUS CONSUMPTION, YOU'RE MORE LIKELY TO LEAVE YOUR MEMBERS SATISFIED AND ENGAGED.

I became a Certified Virtual Presenter. I am meeting my people where they are.

What do I talk about? It has to do with my *why*. I believe in elevating others to elevate others. How can we leave people better off than where we found them? That's what I value. My

programs and consulting practice focus on connection, appreciation and emotional intelligence. Now more than ever, people desire connection. It is one of the top three needs I hear from partners and clients.

When the pandemic hit in March, I predicted that emotions would run high. I became curious. Human behavior and experiences fascinate me. I was interested to know what people felt as the days and weeks passed and what patterns would emerge. For the last five months, I have been asking audiences to share the top three emotions they feel.

Anxious. Tired. Frustrated. These are the words people use to describe how they feel right now. Do you know what the next two are? Grateful and hopeful. Understanding how people feel gives us the means to summon empathy, empowering us to elevate others.



Which brings us full circle. How can your association remain viable? I recommend doing what we did in our association. We held a member retreat and invited members to tell us what they want and need in the coming months. We asked, listened, took notes and crafted a responsive and proactive strategy for moving forward. We meet members where they are and give them the tools and resources they need for their professional and personal development.

I suspect the same is true for you, my fellow WSAE members. You are adjusting and adapting your membership models to meet your people where they are. Our associations exist to serve our members. We are still here to do just that.

Consider the P.L.A.N. approach for your association:

Pause. Stop and assess where you and your association currently are.

Listen. Make phone calls, have a virtual meeting or send out a survey. Listen to what people are telling you they want or need from you right now. And then do it again.

Adapt. What changes can you make at little cost that will add maximum value to your members? Is it to meet more often? Offer more programs? Set up a virtual room for them to use to meet?

Noodle. This is another way to say “reflect.” Take time for this. Look inside your organization and ask people to help you innovate ways to creatively add value and help your members.

Like you, we have been busy these last months, upping our game and adapting to the ever-changing demands that the event and speaking industries are experiencing. There is no new normal, not yet. Change occurs rapidly, so much so that we barely have time to react. What we are experiencing are new sets of new normals.

And just like that, many doors open. Opportunity awaits for all of us. ■



Roger Wolkoff is a motivational speaker who helps clients step outside themselves so teams, organizations and communities become the ones people don't leave. He speaks in a highly interactive and engaging way about the power of connecting, gratitude and appreciation, delivering stories and ideas to help unlock what's already inside you. Roger is a WSAE member, and serves as President-Elect for the National Speakers Association-Wisconsin. Visit his website for more information: rogerwolkoff.com.

National Speakers Association-Wisconsin serves as resource for other WSAE members

How can we help each other? The mission at National Speakers Association (NSA) of Wisconsin is simple: meet and serve members where they are. The vision is to be the go-to source for meeting professionals, associations and organizations to find exceptional speakers for their meetings, conferences and events.

Are you tired of ho-hum boring Zoom programs? What if your attendees stayed for the entire program and didn't drop off? What if you were the hero putting together your next online event? Several members of the National Speakers Association of Wisconsin are Certified Virtual Presenters, trained to deliver engaging online programs and have the technical expertise to do so. Visit www.wisconsin-speakers.com to learn more.

WSAE member Roger Wolkoff, NSA-Wisconsin President-Elect, remains hopeful about the future. It is what we make it. We are better together when we, as a WSAE community, can collaborate, ideate and initiate. The more we do together, the more we learn. The more we learn, the more we grow. When we grow, we elevate each other, and who wouldn't want more of that? ■





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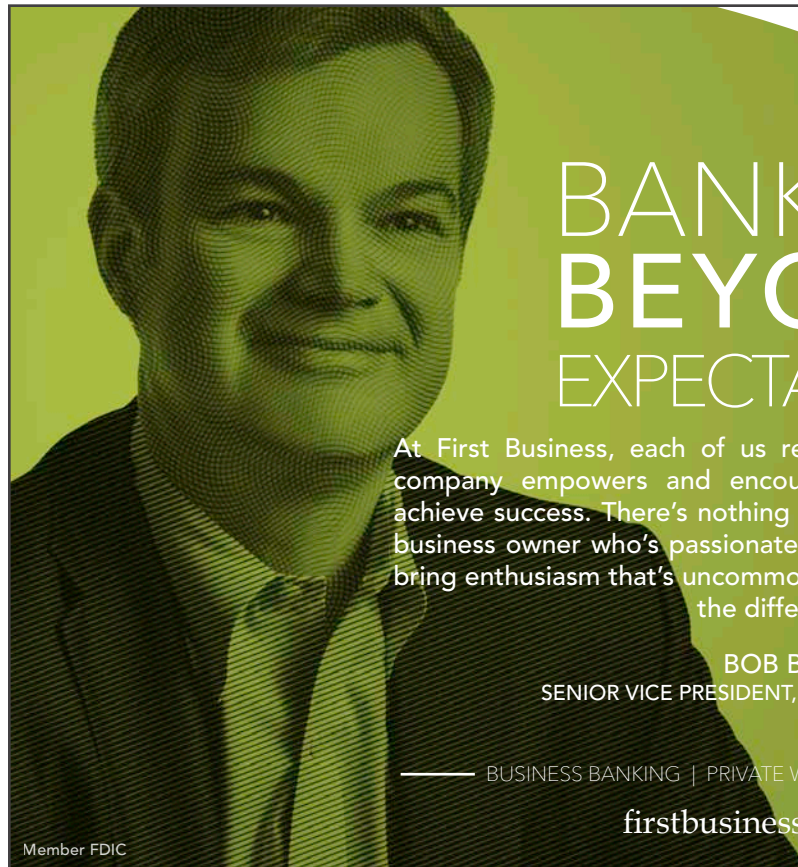
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James Villa, CAE

Chief Executive Officer, the Wisconsin Chapter of NAIOP,
the Commercial Real Estate Development Association

How did you end up working in associations?

Like many association leaders my career path didn't start out in associations. I spent nearly two decades working in the public sector, including at Milwaukee County where, in addition to other things I worked on the Park East project. During this time I had an opportunity to really get to know economic development and commercial real estate professionals. I hadn't thought about heading an association and, to be honest, wasn't sure I would even be any good at it. When leaders at Commercial Association of REALTORS WI (CARW) approached me about being CEO of their organization, I just felt a connection to the work they do, and wanted to find a way to contribute to their success.

What would you like us to know about NAIOP Wisconsin?

NAIOP members are champions of creating thriving communities through successful real estate development. They possess boundless optimism for a brighter future because they know our industry has the power to advocate for it, build it and make it so.

Please share a favorite success, accomplishment or memory?

In 2019 our peers presented us with the Chapter and Executive of the Year awards. It was very rewarding and humbling at the same time. My proudest moments, however, truly are when members tell me about a success they've had that they attribute to their involvement in the organization.

What words of advice do you have for young professionals starting out in the association industry?

Take the time to really get to know the people and industry you represent.

AS AN INDUSTRY, WE ARE ALSO GOING TO NEED TO LEAD ON FINDING WAYS TO MONETIZE REAL AND ON-DEMAND ACCESS TO CONTENT THAT WAS PREVIOUSLY DELIVERED IN PERSON WITH EVENT AND SPONSORSHIP REVENUES.

What is something you have had to do very differently in 2020 than you have had to do in the past?

Everything! We've tried to look at everything we do differently to better serve our members during the pandemic. Perhaps the one that

stands out most is building community among our industry professionals in a virtual world, giving them the tools to build meaningful relationships and business opportunities. We relied a lot on in-person events and now I am working diligently to build one on one and small group virtual gatherings. For me personally, I've definitely had to learn how to use the coffee machine (to the chagrin of every barista in town).

What do you see as some of the biggest challenges for associations in 2021 and beyond?

Economic and public health uncertainty will put tremendous financial pressure on individuals and businesses. While associations will be more critical to industry success than ever, the challenge will be to fine tune our value proposition to stand out while everyone is reducing budgets. As an industry, we are also going to need to lead on finding ways to monetize real and on-demand access to content that was previously delivered in person with event and sponsorship revenues.

What steps are you taking to better position yourself to face these challenges?

We are listening to learn the challenges our members are facing so that we can better understand how to adjust our operations. Our goal is to be an indispensable member of their team and the only way to accomplish that is to reach out and speak to them directly more than ever. ■

How to Create Your First Omnichannel Marketing Campaign

by Maeghan Nicholson

The clamor for consumer attention only gets more complicated and crowded over time. Digital marketing experts now estimate that most Americans are exposed to around 4,000 to 10,000 advertisements each day! These ads are coming from an ever-growing list of channels, including billboards, radio, TV, phone calls, email, direct mail, social media, website banner ads, Google AdWords and text messages.

Probably only 100 or so of these messages will make it through your attention filter on a given day. And a Microsoft study found the average human attention span is only eight seconds. It's the reason that having your campaign on multiple channels increases its chances for success. If your campaign only runs on one channel, you have exactly one opportunity to make it through the attention filter, and then only eight seconds to compel someone to take action. But if you are using an omnichannel approach, you have more chances and more touches to break through the clutter and keep that campaign message top of mind.

In fact, research conducted by Gartner has found that campaigns across four or more channels outperform single or dual-channel campaigns by 300%. A study by Kantar Millward Brown similarly found that integrated campaigns are 31% more effective at building brands. The increase in reach, frequency and consistency by being on multiple platforms at once (just like the customers are) brings real value.

The majority of sales are made after the eighth marketing touchpoint. Assuming your budget doesn't accommodate for the spending needed for billboards and television advertising, here are four suggested channels you can use together for your first effective omnichannel marketing campaign.

Social media

Pew Research shows that 72% of the public now uses social media, and of those that use it 75% of them log in every day. Facebook and Instagram are the most popular

HAVING YOUR [MARKETING] CAMPAIGN ON MULTIPLE CHANNELS INCREASES ITS CHANCES FOR SUCCESS. IF YOUR CAMPAIGN ONLY RUNS ON ONE CHANNEL, YOU HAVE EXACTLY ONE OPPORTUNITY TO MAKE IT THROUGH THE ATTENTION FILTER, AND THEN ONLY EIGHT SECONDS TO COMPEL SOMEONE TO TAKE ACTION.

social media platforms, with some people spending three-four hours per day on these two sites alone!

You can take a list of your members and prospects and upload it to Facebook to match with Facebook users, and then only target your ads to those

profiles, making it a more targeted and effective use of advertising dollars than just *boosting* a post to a general audience. You can reach people in this way even if they do not *like* your Facebook or Instagram pages.

Social media can be a good place to start to warm up your audience before the other channels hit, and then to help maintain awareness through the end of the campaign.

Direct mail

The average household only gets two pieces of mail each day, compared to 157 emails. The majority of consumers check their mail every day and a study by Epsilon found that 77% of consumers sort through their mail as soon as they get it, so if you're looking to get through your audience's attention barrier, the mailbox is a key placement.

A study by the UK Royal Mail found that 92% of people were driven to online or digital activity as a direct result of receiving direct mail. While your actual conversions may be happening online, that traffic can be driven by the use of direct mail.

Email

You should be tracking when your direct mail piece is going to arrive in mailboxes and schedule an email to hit around the same time with the same offer. Direct mail and email are the powerhouses of marketing messages as they have the highest response rates at 5% and 1% respectively. A study by HubSpot found that the average mail response increases to 25% if it is combined with email.

Don't have emails for your contact list? Informed Delivery is an email program through the USPS where mail re-

ipients get an email about what is going to come in their mailbox that day. Approximately 29 million people are already signed up with Informed Delivery and sign-ups are increasing by about a million people per month. Recipients are highly engaged: 86% of people who are signed up open these emails daily, and they have an average click-through rate of 7-8%! It's an easy way to get in the inbox of people you don't have email addresses for.

Website retargeting

Once you've gotten people to your website from the above channels, don't let them go! MIT found that 86% of people who are interested in a product/service will visit the website first before calling or visiting a brick and mortar location. However, Google Analytics shows that 96% of unique website visitors will leave without taking any action.

This is where website retargeting ads come in. These are the ads that follow you around the internet after you have browsed a shopping site. They may be annoying, but they are effective. It's estimated that 26% of customers will return to a site through retargeting, and visitors who are retargeted with display ads are 74% more likely to convert.

You spent the money up front to get these people to at least consider your offer, now the goal is to not let them forget about you. Retargeting ads act as that subtle reminder that says, "Hey, remember you were interested in this?" And their click rates are 10 times higher than regular display ads because they have this context of a previous visit.

You want this part of your omnichannel campaign to last at least a month. In one comScore study, retargeted ads led to a 726% lift in website visitation after four weeks of ad exposure.

Does managing four or more channels sound like a lot of work? The truth is, it shouldn't take that much more time to do an omnichannel campaign than it takes to do a single channel campaign. You should be able to use the creative assets and copy across channels for consistency, just changing the sizing to fit each platform's layout and specifications. ■



Maeghan Nicholson is the Marketing Manager at Suttle-Straus.

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- A sanitation station was set up at the entrance to the meeting room.
- Desktop sanitizers were provided at the coffee and beverage station.
- Face shields were provided to all attendees to wear if they wanted to.
- Attendees were safely spaced out, seated alone at 8-foot tables.
- Alternate seating was available behind the main seating area for anyone wishing for additional separation from other attendees.

In 2020, we all—WSAE included—pivoted to virtual, particularly with regards to events. And again, like so many of our members, we are beginning to explore what live, in-person events might look like going forward.

In late September, WSAE held an in-person Meeting Planner Exchange. Thank you to the 12 WSAE members who joined us in our small Meeting Planner Exchange at the Ingleside Hotel in Pewaukee. Masks were required at all times in public spaces at the hotel including the meeting room. The only exception was during the meal service. A plated meal was served with rolled silverware by one hotel server who wore a mask and gloves at all times. In addition, to ensure everyone's safety:

We received very positive feedback through a post event survey that nearly every attendee completed. Comments included:

- *It was great to get out and see our people! Lots of good conversation with a lot of good takeaways.*
- *Great content and made me feel very comfortable with meeting in-person.*
- *It was great meeting in person and especially the roundtable to just talk about things in the event world right now. ■*



Food and Beverage Re-imagined

Wisconsin Center District hosts experience for meeting planners

Meeting planners know five-star hospitality when they see it. And that's exactly what a select few experienced on the evening of Tuesday, Oct. 27 during a private, socially-distant tasting event at Milwaukee's convention center, the Wisconsin Center. An intimate group of Milwaukee-based meeting planners gathered to experience the completely reimagined food and beverage program available at the Wisconsin Center District's (WCD) venues. Thanks to new leadership by Levy Restaurants' Executive Chef Christopher Pulling and General Manager Julio Henriquez, meeting and events planners can now elevate their clients' next experience with high-end, customizable menu options when they book an event at the Wisconsin Center.

As the Oktoberfest-themed tasting began, guests were welcomed with craft beverages and appetizers, including a mini beer stein with pub cheese, and fish and chips. Once seated at their tables, Chef Pulling engaged attendees with cooking demos of select dishes while masked servers ensured they had everything they needed to feel safe, full and entertained.

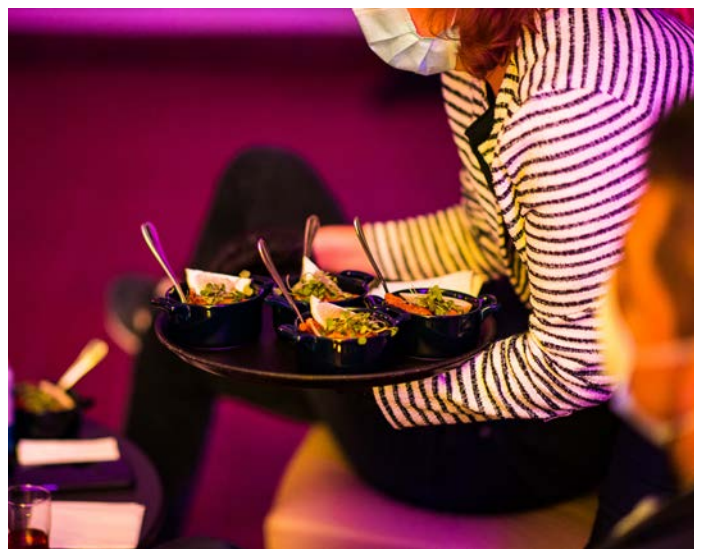
"Reimagining a food and beverage program in the midst of COVID-19 is no small feat," said corporate event and meeting planner Mike Underwood, who attended the tasting. "Levy Restaurants and the Wisconsin Center District proved that focus on the client experience, while incorporating locally-sourced ingredients and products is possible with the right amount of care and thought. Strict food safety preparation and service protocols

were adhered to, while inventive small-plate options were served to a discerning audience. Light-hearted and informative presentations by Levy Restaurants' new head chef and general manager were paired with delicious food and beverage offerings."

This intimate event was a debut of the new direction the WCD's F&B program is headed with Pulling and Henriquez at the helm. Both bring prestigious hospitality experience and education to their roles and are dedicated to ensuring world-class dining experiences. Not only will Pulling and Henriquez cater to smaller, socially distant events, the same care and detail will be given to larger events when they begin to make a comeback.

"Our goal is to make sure that the Wisconsin Center District is always providing the highest quality, safest experience for our guests and clients," said Marty Brooks, president and CEO of the WCD. "Although COVID-19 has pressed pause on the events industry, we're looking to the future and are excited about the experiences we'll be able to provide. The Wisconsin Center expansion is moving forward, we just achieved Global Biorisk Advisory Council STAR accreditation for all three of our venues, and we have brought in food and beverage experts in Chef Chris and Julio. Their gold-standard expectations for creativity and service will expand our offerings and provide second-to-none, customizable options for clients large and small."

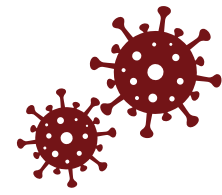
If you are interested in learning more or booking an event, please visit wcd.org/book-your-event. ■





2020: An unprecedented year

In response to the disruption created by the COVID-19 pandemic, WSAE took several actions to ensure that our members were safe and positioned as well as possible to move forward:



Added a COVID-related resources page to our website

- Government orders
- Industry-specific webinars
- Links to wide variety of online resources



Compiled weekly e-mail update series

Keeping members alert to the rapidly changing landscape

In partnership with other SAEs, offered free webinars on COVID-related topics

- *How to go virtual while still creating an engaging experience*
- *Adding Member Value in Time of COVID-19*
- Association Laboratory COVID-19 Research Webinar
- *COVID-19: CARES Act Resources for Associations and Legal Strategies for Association Meetings*
- *Legal Governance Challenges for Associations During a Pandemic*

Brought alternate networking and educational options in lieu of regularly-scheduled programming

Virtual

- Roundtables for CEOs, Meeting Planners and industry supporters
- Roundtable bringing together industry support and association professionals
- Spring Forward
- Workshop - *Tactics for Sponsor and Exhibitor Engagement (and Results!) in Challenging Times*
- Awards Ceremony & Annual Business Meeting

Small, Physically-Distanced

- Executive Exchange
- Meeting Planner Exchange

Focused extra support and attention on Industry Supporters

- Conducted Industry Supporter Survey to gauge how to best provide support
- Added special guide sections to Membership Directory and *VantagePoint* magazine

Annual Sponsors

- Produced video
- Extra opportunities to host in remote environments

Social Snapshot

- f** 508 Followers
8,212 Users seeing content/year
- t** 381 Followers
33,000 Tweet impressions/year
- in** 184 Followers
408 Group Members

TOP MEMBERSHIP FEATURES



Building Connections

- Online discussion forum and LinkedIn Group
- Virtual and in-person meetings and networking
- Print and online Membership Directory
- Industry partner opportunities to host or sponsor
- Promotional avenues: newsletter, social channels



Professional Development

- CAE credits offered for WSAE programs
- CAE prep training, support and scholarships
- Leadership opportunities on committees and board
- Authorship opportunities: Web blog, *VantagePoint*
- Career headquarters job board



Tools for your Association

- Discounts through industry partners: Constant Contact, Association Laboratories, .orgSource
- Real-time compensation benchmarking
- Access to industry information: Newsletter, *VantagePoint*, website



HOW CAN WSAE HELP YOU IN 2021?

We end this graphic as we began - with COVID. WSAE values our community of association professionals and those who support us. Please let us know if budget tightening due to the current pandemic-related climate is making it a challenge to pay your membership dues. We can work something out. We are here for you!



WSAE: 600+ Members Strong

Spread the word!

- Group memberships available
- Other options available, if needed

#WSAE #InGoodCompany

Contact: membership@wsae.org | (608) 310-7850

Industry Supplier Guide

Properties

Best Western Premier Park Hotel	David Moser	(608) 285-8000	dmoser@parkhotelmadison.com
Best Western Premier Waterfront Hotel & Convention Center	David Helgeson, CMP	(920) 230-6288	dhelgeson@bwoshkosh.com
Blue Harbor Resort & Conference Center	Sara Kern	(920) 889-1684	skern@blueharborresort.com
Concourse Hotel and Governor's Club	Kelly Gwiazda	(608) 294-3049	kgwiazda@concoursehotel.com
Glacier Canyon Lodge at The Wilderness	Melanie Klongland	(608) 253-9729	melk@wildernessresort.com
Great Lakes Management Group	Adam Leinen	(608) 630-7235	adam.leinen@glmghotels.com
Hilton Garden Inn Sun Prairie	Ben Glantz	(608) 856-4500	bglantz@hoari.com
Hotel Northland, Autograph Collection	Brandon Flitter	(920) 393-7499	bflitter@hotelnorthlandgreenbay.com
Hyatt Regency Milwaukee	Paul Bristow	(414) 270-6064	paul.bristow@hyatt.com
Kalahari Resorts and Conventions	Joey Greeno	(608) 254-3253	jgreeno@kalahariresorts.com
Kalahari Resorts and Conventions	Kyra Popp	(608) 253-5604	kpopp@kalahariresorts.com
Madison Marriott West Hotel & Conference Center	Jim Strom, CMP	(608) 824-2717	jim.strom@atriumhospitality.com
Marcus Hotels and Resorts	Dana Jonson	(414) 390-1892	danajohnson@marcushotels.com
Marcus Hotels and Resorts	Jeff Montalto	(608) 260-2304	jeffmontalto@hiltonmadison.com
Marcus Hotels and Resorts: Grand Geneva Resort & Spa	Tabitha Schrock	(309) 212-5120	tabithaschrock@grandgeneva.com
Milford Hills	Taylor Williams	(920) 699-2249	taylor@milfordhills.com
Monona Terrace Convention Center	Laura MacIsaac, CMP	(608) 261-4016	lmacisaac@mononaterrace.com
North Central Group - Brookfield Conference Center	Brandon Smith	(262) 439-5515	bsmith@ncghotels.com
Potawatomi Hotel & Casino	John Wilson	(414) 847-7895	jwilson@paysbig.com
Red Crown Lodge, LLC	Sheryl Tharman	(715) 385-2709	info@redcrownlodge.com
Red Lion Hotel Paper Valley	Gina Hartl	(920) 733-8000	ghartl@appletonpvh.com
Sheraton Milwaukee Brookfield	Dick Bradley	(262) 364-1041	richard.bradley@marriott.com
The Fluno Center	Kristh Meredith	(608) 441-7108	kmeredith@fluno.com
The Fluno Center	Cierra Yakes	(877) 773-5866	cyakes@fluno.com
The Hotel Retlaw	Dana Ecker	(833) 473-8529	decker@thehotelretlaw.com
The Landmark Resort	Rick Malkemus	(920) 868-3205	rmalkemus@thelandmarkresort.com
The Osthoff Resort	Angela Koran	(920) 876-5815	akoran@osthoff.com
The Osthoff Resort	Marin Medema, CMP	(920) 980-0187	mmedema@osthoff.com
The Osthoff Resort	Laura Otten	(920) 876-5812	lotten@osthoff.com
The Ridge	Janine Osborne	(262) 249-3852	josborne@ridgelakegeneva.com
Wisco Hotels	Joan Pinch	(920) 322-8204	jpinch@wiscohoteles.com

Industry Supplier Guide continues on the next page.

Destinations

Colorado Springs Convention & Visitors Bureau	Kathy Reak	(719) 685-7632	kathy@visitcos.com
Destination Lake Winnebago Region	Darcie Holte	(920) 923-3010	dholte@fdl.com
Destination Madison	Sarah Lemmers	(608) 441-3943	lemmers@visitmadison.com
Destination Madison	Keola Shimooka	(608) 441-2630	shimooka@visitmadison.com
Discover The Palm Beaches	Peggy Murray Hagaman	(847) 236-0200	phagaman@thepalmbeaches.com
Fox Cities Convention & Visitors Bureau	Amy Rivera	(920) 734-3358	arivera@foxcities.org
Greater Green Bay CVB	Ben Cahall	(920) 494-9507	ben@greenbay.com
Greater Green Bay CVB	Brad Toll	(920) 405-1138	brad@greenbay.com
Greater Green Bay CVB	Beth Ulatowski	(920) 405-1156	Beth@greenbay.com
Janesville Area CVB	Lori Johnson	(608) 757-3171	meetings@janesvillecvb.com
Louisville Convention & Visitors Bureau	David Kinney	(773) 354-0965	dkinney@gotolouisville.com
Manitowoc Area Visitor and Convention Bureau	Jason Ring	(920) 686-3071	jring@manitowoc.info
Manitowoc Area Visitor and Convention Bureau	RaeAnn Thomas	(920) 686-3077	rthomas@manitowoc.info
Marshfield Convention & Visitors Bureau	Matt McLean	(715) 384-4314	mclean.matt@visitmarshfield.com
Oshkosh Convention & Visitors Bureau	Jodi Jensema	(920) 303-9200	jodi@visitoshkosh.com
San Diego CVB	Maria Andriola	(312) 943-5399	mandriola@sandiego.org
Stevens Point Area CVB	Sara Brish	(715) 344-2556	sara@stevenspointarea.com
Stevens Point Area CVB	Melissa Sabel	(715) 344-2556	melissa@stevenspointarea.com
Visit Beloit	Matt Bosen	(608) 313-1366	matt@visitbeloit.com
Visit Brookfield	Kim Casey	(262) 789-0220	kim@visitbrookfield.com
Visit Brookfield	Ann Marie Hess, CMP	(262) 789-0220	annmarie@visitbrookfield.com
Visit Brookfield	Tracy Sinclair	(262) 789-0220	tracy@visitbrookfield.com
Visit Fort Worth CVB	Douglas Dvorak	(312) 451-9393	douglasdvorak@FortWorth.com
VISIT Milwaukee	Laura Lutter Cole	(414) 287-6220	LLutterCole@milwaukee.org
VISIT Milwaukee	Leslie Johnson	(414) 287-4259	LJohnson@milwaukee.org
VISIT Milwaukee	Brittany Korth	(414) 287-6244	BKorth@milwaukee.org
VISIT Milwaukee	Meg McKenna	(414) 287-4234	mmckenna@milwaukee.org
VISIT Milwaukee	Peggy Williams-Smith	(414) 287-4259	PWilliamsSmith@milwaukee.org
Visit Seattle	Emily Gooding	(206) 461-5876	EGooding@visitseattle.org
Waukesha Pewaukee Convention and Visitor Bureau	Deana Heinisch	(262) 542-0330	deana@visitwaukesha.org
Wisconsin Dells Visitor & Convention Bureau, Inc	Natalja Deduna	(608) 253-5217	natalja@wisdells.com
Wisconsin Dells Visitor & Convention Bureau, Inc	Alexandra Harjung, CMP	(608) 253-5701	alexandra@wisdells.com
Wisconsin Dells Visitor & Convention Bureau, Inc	Jessica Rieflin	(608) 253-5217	jessica@wisdells.com
Wisconsin Dells Visitor & Convention Bureau, Inc	Penny Turner	(608) 254-8088	penny@wisdells.com

Services

.orgSource	Sherry Budziak	(847) 275-1840	sherry@orgsource.com
BizStarts	Patrick Snyder, IOM	(414) 973-2334	psnyder@bizstarts.com
Blue Sky eLearn	Jodi Lynn Ray		JRay@blueskyelearn.com
Celebrations Entertainment	Geoffrey Sandler	(608) 233-5822	info@celebrationsentertainment.com
CliftonLarsonAllen	Sarah Fisher	(608) 662-8651	sarah.fisher@claconnect.com
ConferenceDirect	Michelle Eggert, CMP	(262) 853-7171	michelle.eggert@conferencedirect.com
DigiCOPY	Brant Bergeron	(715) 347-2736	bergeron@dcopy.net
First Business Bank	Alicia Buttchen	(262) 792-7126	abuttchen@firstbusiness.com
First Business Bank	Terry Kotsakis	(262) 321-9387	tkotsakis@firstbusiness.com
First Business Bank	Kim Preston	(262) 792-1400	kpreston@firstbusiness.com
First Business Bank	David Schade	(262) 792-1400	dschade@firstbusiness.com
Higher Logic	Paul Wehking	(202) 360-4415	paul@higherlogic.com
Majic Productions, Inc.	Ed Buchner	(414) 839-1760	ebuchner@majicpro.com
meetingpages.com	Casey Romano	(952) 233-1195	casey@meetingpages.com
Name Badge Productions	Roxanne Wenzel	(608) 831-3435	roxanne.w@namebadgeproductions.com
National Speakers Association of Wisconsin	Paula Houlihan		paula@paulahoulihan.com
National Speakers Association of Wisconsin	Lisa Koenecke		lisa.koenecke@gmail.com
National Speakers Association of Wisconsin	Cheri Neal		Cheri@CheriNeal.com
National Speakers Association of Wisconsin	Roger Wolkoff		roger@rogerwolkoff.com
National Speakers Association of Wisconsin	Julie Wood		juliewood@eseedling.com
Omnipress	Nick Burke	(608) 246-2600	nburke@omnipress.com
Omnipress	Justus Collins	(608) 246-2600	jcollins@omnipress.com
Omnipress	Holly Meyers	(608) 246-2600	hmeyers@omnipress.com
Omnipress	Jonny Popp	(608) 246-2600	jpopp@omnipress.com
Omnipress	Tim Smith	(608) 246-2600	tsmith@omnipress.com
Purtell Marketing and Planning	Megan Purtell	(608) 358-8458	mmpurtell@gmail.com
Steininger & Associates, LLC	Daniel Steininger	(414) 430-2204	Dsteinin@execpc.com
Talbott Talent	Leah York, CAE	(317) 762-5592	leah@talbotttalent.com
The Abbey Group, Ltd	Sandra McNeely, CAE, CFP	(414) 671-7010	smcneely@abbeygroupltd.com
The Badger Group	Sally O'Brien	(920) 563-1135	sallyo@badgergroup.com
The Payroll Company	Melissa Versnik	(608) 440-2941	melissav@payrollcompany.biz
Thysse	JJ Giese	(608) 249-6951	jj@thysse.com
Town Bank	Michael Doers	(608) 282-4840	mdoers@townbank.us
Town Bank	Jaime Voss	(608) 282-4840	jvoss@townbank.us
Town Bank	James West	(608) 282-4840	jwest@townbank.us
Tri-Marq Communications, Inc.	Tom Graybill	(414) 223-4380	tom@trimarq.com
Valley Expo and Displays	Todd Schwartz	(815) 873-1500	tschwartz@valleyexpodisplays.com
Valley Expo and Displays	Ella Nelson	(815) 873-1500	enelson@valleyexpodisplays.com
von Briesen & Roper, s.c.	Ann Barry Hanneman	(262) 923-8652	ahanneman@vonbriesen.com
Wegner LLP, CPAs and Consultants	Glenn Miller, CPA	(608) 442-1940	glenn.miller@wegnercpas.com
Widget Source	Sue Kaestner	(608) 424-5775	sue@thewidgetsource.com

Congratulations to Wisconsin's Newest CAEs

The Summer 2020 class of CAEs successfully completed the CAE examination administered nationwide on June 8 - July 6. Four of the five from Wisconsin are WSAE members! ■



Michael Battaglia, CAE

Account Executive,
AMPED Association Management

Why did you decide to pursue your CAE?

I think it's important to always improve your skills and as a result, try to achieve the top credentials in

your field. Association Management is not a career I thought much about during undergraduate but after 10 plus years I have grown to appreciate the work and the missions we help further. Pursuing the CAE also helped me expand my network and meet new people while studying.

What does achieving your CAE mean to you?

More than anything, I think it validates my approach to managing clients and it means a lot to me personally because I achieved one of my goals. I'm grateful to be part of a new community of professionals as well. I want to use this as a springboard to obtain new certificates and learn new things that can help me evermore day to day. I am passionate about the idea of mixing different ideas to find an innovative approach.

What advice do you have for a colleague considering studying for their CAE?

Don't be scared of the workload and know your study habits. I think ASAE does a good job of showing you how to prepare, but it's up to the individual to make it work for them. I think most people should be able to identify strengths and weaknesses after taking one or two practice exams and I would recommend focusing on the weak areas first. I took all the practice exams I could, multiple times!



Dana J. Murn, CAE

Director of Membership,
American Academy of Cosmetic
Dentistry

Why did you decide to pursue your CAE?

There are a few reasons, but the two that come to mind are:

1. I realized that I really enjoyed working in the non-profit/association sector and I wanted to give myself additional opportunities to grow professionally
2. My mentor at the time, Kristina Mattson-Grimm, CAE was very supportive and encouraging regarding my professional development and felt strongly that in my pursuit of my CAE, I would continue my growth as a leader and employee.

What does achieving your CAE mean to you?

Achieving my CAE means I put myself first (which hadn't happened in a long time). I started the process of wanting to get my CAE back in 2014. Because of personal reasons, I ended up not being able to move forward at the time I wanted to, to earn my CAE, so my timeline got pushed back. I was lucky to have the support of my mentor, Barb Kachelski, MBA, CAE, and when I was able to really focus on my pursuit of my CAE, it was an investment in myself, putting my career first, and getting the opportunity to dream about where I could picture myself in the future after those letters came after my name.

What advice do you have for a colleague considering studying for their CAE?

My two pieces of advice – sign up for the MSAE online course – it was a huge help to have a study guide and a group to talk through the logic of the questions that are part of the CAE exam. The other piece that helped me in my final weeks before taking the exam was the CAE Study Guide 2015 because it was a good review of key concepts with additional opportunities for quiz and test taking!



Amy Overby, CAE

*Executive Director,
The Rees Group, Inc.*

Why did you decide to pursue your CAE?

Within the first year of joining the association field, I learned that it's the gold standard for professionals. It was not only important to achieve, but critical given the complexity of organizations and the world around us.

What does achieving your CAE mean to you?

Honestly, it's the most important achievement of my career. I thought earning a masters degree challenged and stretched my thinking, skills, and abilities, but that dims in comparison to preparing for the CAE exam. I can't imagine leading an association without the credential.

What advice do you have for a colleague considering studying for their CAE?

Don't go it alone. Enroll in a prep course through MSAE or ASAE. These are taught by experts who provide invaluable guidance. Be *all in* for the learning process. Know that it will be a sacrifice to prepare for the exam, commit to it, and be truly open to learning.



Heather Schrader, CAE

*Membership and
Administrative Manager,
Executive Director, Inc.*

Why did you decide to pursue your CAE?

I decided to pursue my CAE because I wanted to better serve my clients and feel fully equipped to manage any requests they sent my way. Understanding the whole picture is extremely important in being the most effective advocate and employee of your association. I have always felt at home in the non-profit world and this was the next step in continuing on that journey.

What advice do you have for a colleague considering studying for their CAE?

Make the decision, make a plan and stick with it! I completed all of my professional development requirements by carefully scheduling everything around my work schedule. Give yourself time to study and time to rest and do your best.

Make the Right
GAME TIME
Decision

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- 4,500 Hotel Rooms
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Contact Beth Ulatowski
Beth@greenbay.com
920-405-1156

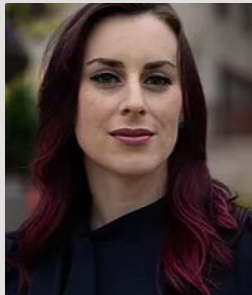


Ashtin Neuschaefer, CAE, one of Association Forum's Forty Under 40



Congratulations to Ashtin Neuschaefer, CAE, Client Executive at Executive Director Inc. for being recognized in Association Forum's 2020 class of *Forty Under 40*! The Forty Under 40 program is a prestigious competition that provides recognition to 40 accomplished association or non-profit professionals who are

under the age of 40, demonstrate high potential for continued success in leadership roles and exhibit a strong passion for - and commitment to - the association management and nonprofit industries. For more information, check out <https://www.associationforum.org/aboutaf/fortyunder40>.



Talbott Talent gains new Vice President

Nonprofit executive search firm Talbott Talent recently welcomed Erica Poff, MA, CAE, PMP, IOM, as its new Vice President. Poff will implement internal business practices, contribute to company strategy and manage nonprofit executive search and consulting projects, among other duties. Poff brings more than a decade of experience in nonprofit development to her new role at Talbott Talent. "I've spent my entire career in the nonprofit field because I'm drawn to the mission-driven nature of this work and the incredible impact nonprofit organizations can have on their communities," says Poff. A member of the American Society of Association Executives (ASAE) and the Indiana Society of Association Executives (ISAE), she is recognized as a Certified Association Professional by ASAE and a Project Management Professional by the Project Management Institute. Talbott Talent is a team of experienced professionals providing executive search and consulting services exclusively to nonprofit organizations nationwide. By creating strategies for leadership and legacy, Talbott Talent helps these nonprofits effectively execute their missions for years to come.

Brag a Little Bit! Send your news to Kristin at kmcguine@wsae.org, and we will include it in future issues of *VantagePoint*. Please note that this is included as a benefit of your WSAE membership, and is available to you at no additional cost.

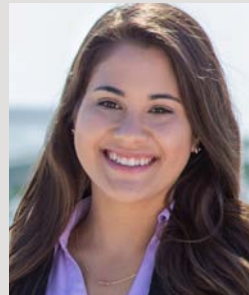


AACD Charitable Foundation wins ASAE Power of (A) award

Congratulations to the American Academy of Cosmetic Dentistry - Their Charitable Foundation's Give Back a Smile program (www.givebackasmile.com) recently won a silver Power of (A) Award (www.thepowerofa.org/awards) from ASAE.

Marcus Hotels & Resorts properties on Conde Nast Traveler's list

Congratulations to Marcus Hotels & Resorts - Two of their properties, the Pfister and St. Kate, made *Conde Nast Traveler's* list of the *Top 20 Hotels in The Midwest: Readers' Choice Awards 2020*. Read more at <https://bit.ly/3mUApHL>.



Association Acumen's Marcie Liebert Recognized

Marcie Liebert, Meetings and Membership Manager at Association Acumen, has received the President's Award from the National Vehicle Leasing Association (NVLA). The award is determined by the NVLA President and given to individuals who demonstrate exceptional leadership and devoted service to the association. "Marcie was always there when I needed her," Doug Moore, NVLA President, said. "I really appreciate everything she has done for the organization. She's very intuitive. When I ask her to do something, I find out she's already taken care of it. There is no doubt that through her dedication and dependability, she very much earned this honor."

Google Arts & Culture celebrates Milwaukee on its global platform

Google Arts & Culture brings a digital celebration of Milwaukee music, arts, food and more to the world in collaboration with VISIT Milwaukee at g.co/Milwaukee. Google announced its partnership with 16 world-class Milwaukee institutions, including VISIT Milwaukee, bringing the city's culture, people and stories online on its Google Arts & Culture platform and app at g.co/Milwaukee. Anyone in the world can engage with organizations across the city in one digital location!

As of October 1, 2020

Society for Ambulatory Anesthesia selects management company Association Resource Center

The Society for Ambulatory Anesthesia (SAMBA) has selected Association Resource Center (ARC) of Milwaukee to provide association management services to the organization. Andrew Bronson, CAE will serve as Executive Director and Julianna Cibula and Claire Murray will serve as Account Coordinators.

ARC has a long and successful history of managing other anesthesiology societies and will be an ideal fit to lead SAMBA in its strategic planning.

"We look forward to working with ARC to achieve these initiatives," said Dr. Leopoldo Rodriguez, SAMBA President. "There are already great relationships established with the ARC staff and SAMBA leadership that will help us with our mission."

"I look forward to working with the SAMBA Board and members in their mission," said Andrew Bronson, CAE. "In these uncertain times with COVID we are ready to adapt in ways that keep moving SAMBA forward."

Impact Association Management welcomes new partnerships

Impact Association Management announced a new partnership with the National Conference of Bar Foundations (NCBF). This partnership will allow NCBF to shift some of their office management, marketing, and membership duties to Impact.

"After meeting with the NCBF, I immediately knew we would be a great match for one another. Their board is eager to hear our thoughts and suggestions. I know their Association Managers, Caroline and Jenny will do a great job at helping them continue to grow and focus on their mission," says Jodi Fisher, CEO at Impact Association Management.

"The National Conference of Bar Foundations selected Impact AMC after a national search, and dozens of interviews. Their team listened to our needs and has already begun implementing our plans, and providing amazing support for our board and members," says James Huggler, President of National Conference of Bar Foundations.

Impact Association Management has also announced a new partnership with the Wisconsin Alliance for Excellent Schools (WAES). This partnership will allow WAES to more closely focus their mission of ensuring high quality schools for all children in every Wisconsin community. "At Impact, we work with several non-profits whose focus is on education. This has prepared us for our work with WAES. We get them and their mission and already see so many ways in which we can help! This is going to be a fantastic partnership," says Jodi Fisher, CEO at Impact Association Management.

Mike Barry, Wisconsin Association of School Business Officials
Sara Brish, Stevens Point Area CVB
Ed Buchner, Majic Productions, Inc.
Mehak Chopra, Badger Bay Management Company
Amanda Falk, Greater Milwaukee Association of REALTORS®
Jennifer Graham, Association of Equipment Manufacturers
Denise Guttery, Wisconsin Newspaper Association
Julia Hunter, Wisconsin Newspaper Association
Jessi Jensen, Badger Bay Management Company
Kerri Joseph, Snow and Ice Management Association, Inc
Brent Kindred, Wisconsin Automobile & Truck Dealers Association
Brittany Knuteson, Wisconsin Grocers Association
Maddie Parise, National Fluid Power Association
Jordan Schelling, Wisconsin Newspaper Association
Andrew Schmidt, Executive Director, Inc
Ryan Silvola, Wisconsin Association of School Business Officials
Jill Sukow, Wisconsin Automobile & Truck Dealers Association
Sarah Tulley, Executive Director, Inc
Rachel Witte, Badger Bay Management Company
Gayle Worland, Wisconsin Newspaper Association
Joe Zwier, National Fluid Power Association



We've Been *In This Together* Since Long Before COVID-19

by Michelle Czosek, CAE



As I prepared to write this column, I was curious to see when I first started contributing to *VantagePoint*. My first issue was Fall 2015 and the topic was change. I wrote, “Change is something that, until recently, I have not been comfortable with.

I like things that are steady, reliable and that I can count on. Change is the exact opposite to me. Change pushes us out of our comfort zone and brings uncertainty and risk with it.”

The truth is I overstated it (quite a bit) when I made it sound like I was becoming comfortable with change. For all of you that are with me on the feeling that change is sometimes overwhelming, the universe has not been kind to us this year. However, it has pushed us outside of our comfort zone as things seem to change every day in unexpected ways. It has been the impetus for rising to new challenges, delivering education in engaging new ways and collaborating with others as we continue to recognize that we are all better together.

Speaking of change, while we were not able to deliver an in-person Summit this year, we did hold two events within that time frame that allowed us to offer our members education, networking and association information. Our first day featured Janet Sperstad, CMP, as she shared the five key motivational drivers for human behavior and decision making, and provided examples of how we can put these into action to improve virtual and live experiences. The event not only provided education but allowed us to check out the Remo platform and experience, in my opinion, the next best thing to in-person networking. A special thanks goes to Tom Graybill at Tri-Marq Communications for everything he did to make this event a success and to our industry partners for hosting tables and fostering networking!

The next day, we held the WSAE Awards Celebration and Annual Business Meeting. While we missed meeting in person, it was wonderful to be able to conduct business and honor our awardees. As *Zoomed out* as we all are, we really are lucky to have the technology to use such platforms to see

[CHANGE] HAS BEEN THE IMPETUS FOR RISING TO NEW CHALLENGES, DELIVERING EDUCATION IN ENGAGING NEW WAYS AND COLLABORATING WITH OTHERS AS WE CONTINUE TO RECOGNIZE THAT WE ARE ALL BETTER TOGETHER.

each other even if we are not in the same place. When I started in association management, we would have had to fax or snail mail you the announcement of our event, you would have

registered the same way and we would've met via conference call. Today's technology allows us to engage our members and stay connected during a time when we have been, for the most part, unable to meet in person.

If you missed the meeting, head over to WSAE's social media to see the awards videos we put together with the help of our nominators and awardees. In-person, we have an opportunity to congratulate people on their recognition in the moment. In this remote environment, it takes the extra effort of reaching out by phone, email or through social media, but I encourage you to do so to let our winners know that you appreciate their contributions to WSAE and the world of associations. Their contributions are a wonderful reminder that we've all been in this together since long before Covid-19.

Congratulations again to our award winners and also to our 2020-2021 officers and board members. This issue of *VantagePoint* features the last Chair's Message from Kathy Raab as she has handed the reins over to Michelle Vetterkind, CAE.

It's likely that things will continue to look a little different in the association world well into 2021, but I'm excited to continue bringing education and networking opportunities to our members in whatever form they take.

As always, please don't hesitate to reach out to me or any WSAE board member if you have questions or ideas for ways WSAE can continue to serve our members during this time.

Take care,

Michelle



Get Social with WSAE

Help us help you, as together we grow our community from within!

Follow, Like, Comment, Share

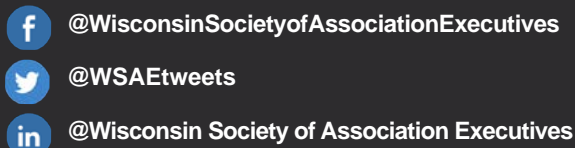
Follow WSAE and engage with our posted content on a regular basis:

- Facebook: facebook.com/WisconsinSocietyofAssociationExecutives.
- The WSAE page on LinkedIn: www.linkedin.com/company/wisconsin-society-of-association-executives-official.
- Twitter: twitter.com/WSAEtweets.
- Subscribe to WSAE's YouTube channel: <http://bit.ly/WSAEYouTube>.
- Encourage your staff and colleagues to follow WSAE and like and share WSAE posts, as well!

Use Tags and Hashtags

Mention/tag WSAE in your social media posts:

- When sharing our posted content and adding your comments.
- When attending association industry events.
- When earning a CAE, CMP or other certification.
- Include a related photo or video clip, if possible.
- Use #WSAE along with association-related hashtags such as #Associations and #AssociationProfessionals with your posts.



Show Off

- On your company website, maintain a partner or affiliation page and display hyperlinked logos to each organization you belong to. Include a summary of what WSAE is and why you belong to and support it.
- Add WSAE involvement as a Job/Position on your LinkedIn profile, including membership, Committee Member or current/past Board Positions.

Share the Experience

After attending a WSAE event:

- Write a short 200-300 word blog article about your experience, including a link to wsae.org.
- Post about your meeting experience, including key take-aways or action items, on Facebook, Twitter and LinkedIn.

Join the Conversation

WSAE provides channels where you can share your knowledge and learn from your peers:

- The Connected Community at wsae.org.
- WSAE's LinkedIn *group* (different from our *page*): www.linkedin.com/groups/1533727
- Read and author articles for VantagePoint magazine.

We are stronger together!

The annual business dinner was billed as "The Next Big Thing." And the organizer wanted us to make it a can't-miss experience. Inspired by our panoramic views of the lake and state capitol, our AV team created an all-new 180° of amazing.

Cue the surround sound.

Let us orchestrate *your* incredible.
Connect with us at MononaTerrace.com

Madison, WI

MONONA  TERRACE

