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Published by WSAE - Where the association community thrives and grows ■ Spring 2021

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VantagePoint is published quarterly in January, April, July, and October. The deadline for submission of copy and advertising is the first of the month preceding publication. For information about advertising rates, contact the WSAE office. Copyright © WSAE 2021.

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Turn to WSAE for Inspiration

by Michelle Vetterkind, CAE



If you haven't attended a recent WSAE event, I'm hoping by the time you're done reading this issue of *VantagePoint*, you will be inspired to be a part of one (or more) of the many opportunities on the horizon.

As I write this, we've just completed the second of our two educational and inspirational WSAE Virtual Road Show events. The first was titled *Communicating Value to Maximize Member Engagement* with Shari Pash, which received rave reviews. The second was titled *Unpacking Hybrid Events* which featured a panel of your peers who've executed hybrid events in the last year. They had many terrific insights to share, and some surprising little details to consider for your own hybrid events. Both sessions could not have been more timely.

I can personally attest to the value of WSAE education sessions – WSAE is how I first experienced the conference platform *Remo*, which the Wisconsin Broadcasters Association has now successfully used for our Student Seminar and will use again for our WBA Awards for Excellence presentations.

WSAE OFFERS SOMETHING FOR EVERYONE. IT IS TRULY AN INSPIRATIONAL AND COLLABORATIVE GROUP THAT NOT ONLY MAKES OUR JOBS EASIER AND OUR WORK BETTER, BUT FURTHER REMINDS US THAT PEOPLE ARE GOOD.

You never know which pieces of the experience will make a difference, but when you engage with WSAE, you can bet that you will most definitely learn something useful!

And, on the subject of hybrid events, please know that your WSAE Board remains active and involved, and recently enjoyed a very successful hybrid Board Retreat. It was the perfect solution to making sure everyone was comfortable, whether they attended in person or virtually.

We are excited to announce WSAE's first in-person event in over a year, the 2021 Spring Fore-ward, to be held June 7-8 at the Grand Geneva Resort & Spa. There will be plenty of forward-thinking education paired with time spent connecting with colleagues both on and off the golf course. The best part will be seeing each other in person, which we will never again take for granted.

We are also excited to announce two events being planned for July – SummerTime to Shine and the Executive Exchange (a personal favorite of mine). Details will be announced soon.

And last, but certainly not least, we are busy planning The Summit, which will be held Oct. 26-27 at the Brookfield Convention Center.

Chair's message continues on page 22.



Calendar of Events

See the calendar at www.wsae.org for more information.



2021 Spring Fore-ward
June 7-8, 2021, Lake Geneva



Executive Exchange
July 20, 2021, Green Bay



SummerTIME to Shine
July 20-21, 2021, Green Bay



The Summit
October 26-27, 2021, Brookfield



Webinar Series

How to Improve Your Association's Sponsorship Program... During the Pandemic
May 26, 2021

Planning for Growth: Neuromarketing for Growth
June 9, 2021

Planning for Growth: Solving Problems for Success
June 23, 2021

Eliminating the Revenue Drought
July 7 2021

Member Retention – A Fresh Look
July 21, 2021

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Spring Fore-ward Is a Perfect Mix of Education and Fun!

June 7-8, 2021

Grand Geneva Resort and Spa

Bang for your buck!

WSAE staff and Board of Directors hold our members' health and well-being as a top priority, and we understand the financial challenges that many of you within our membership community have faced over the past year. We also recognize that it is critical to support our members to stay connected and provide practical resources that will help you and your business thrive, even in the face of adversity.

It is with great excitement that we will be offering the 2021 Spring Fore-ward in-person June 7-8, 2021, hosted by the beautiful Grand Geneva Resort and Spa. This event centers around professional development and the long-awaited networking opportunities and reconnecting with fellow association executives, meeting professionals and industry partners.

Education

Tough Decisions in a .org World – Association Ethics in 2021

Presenter: Karl Alrichs, CSP



Leadership is held to a higher standard on decision-making, especially in the very visible world of association management. In this discussion, we will cover making the right decision under the pressure of

modern society, and then we will share what leaders can do to develop others in these issues.

Association executives know that getting ethics right is a big deal. An organization's ethics is directly connected to its reputation in the community, and solid ethical principles are crucial for the long-term success of any organization. This facilitated discussion goes beyond a lecture on ethical principles. This series of executive-level case studies offer real-time practice for you to sharpen dilemma-resolving skills.

Key learnings include:

- Ethics under pressure, and how to do the right thing.
- Understanding the specific unconscious biases that affect our judgement.
- Using these skills to resolve ethical dilemmas under pressure.
- Train the trainer – using adult learning methods to transfer wisdom and change behaviors.

This session will mix strategy and tactics you can implement immediately, offering the view from 35,000 feet with occasional dips to ground level. You will get effective tactics for keeping their biases in check, and their values and ethics aligned with the vision of their association and their members.

Next Steps – Recruiting, Retaining and Engaging Members

Presenter: Jim Lindell, CSP, Thorsten Consulting Group, Inc.



2025 will be here in a heartbeat. In today's "new abnormal" environment, association leadership needs to execute three critical things to make their association sustainable. In a

world of hybrid meetings and shifting member expectations, association leaders have to adapt quickly. What works? What fails? This fast-paced keynote covers the topic from both the leader's viewpoint and from the member's side of the desk.

This presentation aims to motivate association leadership to meet the needs of their members and focus on the key issues facing them. In the future, what will be different?



What will be the same? Jim will make the key issues simple and understandable, and share the skills and processes needed to recruit, retain and engage members.

Getting this right is essential and becoming more crucial as the membership evolves. The *new normal* followed the great recession and current data trends show that we have entered the *new abnormal*. Association leaders need to be proactive in how they handle it. Our presenter is a CEO and executive coach working directly with multiple state associations, and has direct personal experience with the issues facing modern leaders.

Increase Your Performance Through Self-Compassion



Presented by Debbie Vyskocil

Two factors can stall creativity and curb productivity: 1) being self-judgmental and 2) being self-critical. Resilience and self-compassion are crucial for leadership. Those who are constantly judging themselves cannot perform at their best. Leaders must be creative in their forward thinking and be able to bounce back quickly from adversity to best serve members and the organization.

Learn how self-compassion can elevate confidence and resilience, and ignite motivation. Work on skills to open your awareness and bring self-kindness into your life. When you leave, you will have developed skills to implement and understand the science behind them.

We are emotionally exhausted. Developing self-compassion is necessary to create optimal performance and true happiness.

The World Is Changing – How Do 2021 Trends Impact Us and How Do We Keep Up



Budziak

Presented by Sherry Budziak and Jennie Socha, CAE

In this session, you'll hear about some of the trends affecting associations, and how they influence our organizations as we move through the remainder of 2021 and beyond. Trends explored include hospitality, meetings, marketing and more. These trends will impact how we operate, our expectations in the financial area and the way we plan for the future.

Once trends have been explored, we'll have plenty of time for discussion and scenario planning to help you move forward through these changing and often challenging times. ■



Socha

Sponsors

Several sponsorship levels are available to support the Spring Fore-ward, and customized ideas are also welcome!

You can find more information, including a downloadable support prospectus, online at wsae.org:

Events > Calendar of Events, Spring Fore-ward.

To discuss sponsorship, reserve a space and/or donate a door prize, please contact Chris Caple at ccaple@wsae.org. Thank you to the sponsors who have already come on board!



Event schedule

Monday, June 7

1:15-1:45 pm	Registration
1:45-3:15 pm	Education Tough Decisions in a .org World - Association Ethics in 2021 Presenter: Karl Alrichs, CSP
3:15-3:45 pm	Break
3:45-4:45 pm	Keynote Next Steps – Recruiting, Retaining and Engaging Members Presenter: Jim Lindell, CSP, Thorsten Consulting Group, Inc.
5:15-6:45 pm	Participants & Pairings Party

Tuesday, June 8

8:30-10:00 am	Registration
8:30-9:30 am	Breakfast
10:00 am-3:00 pm	Golf Tournament Shotgun Start Education for Non-Golfers: Increase your Performance Through Self-Compassion Presented by Debbie Vyskocil The World Is Changing – How do 2021 Trends impact us and how do we keep up Presented by Sherry Budziak and Jennie Socha, CAE
3:00 pm-4:30 pm	Golf Awards and Closing Reception

Decisive Moments – Association Ethics in Real-Time

by Karl J. Ahlrichs

Practice makes perfect. Having everything in place to do the right thing at the right time – that’s what *works*. It works in relationships. It works in scanning the pantry making dinner plans. It works in solving tough decisions in a post-quarantine association.

As a leader, it helps to turn your employee’s bad decisions into teaching moments. I wish you could have been there for one of my moments. I was in my early teens, working as a field hand on my grandfather’s farm. He had given me a verbal description of where to dig a large hole for an irrigation tank. I dug for two days straight in the wrong place.

Noting that I was off target, my grandfather did not stop me but turned my errant work into a teaching moment on critical thinking.

“So, do you know what you’re doing?” he would ask.

At first, I shrugged his offer off. By the middle of the second day, I started to realize there was a hidden message in his question. My bravado was ebbing, and I had plenty of digging time to turn things over in my mind. With his guidance, I worked out for myself that I was, indeed, off-target. By about 50 feet. A powerful lesson and one that guides my thinking to this day. A stronger lesson than if he had

IT IS LIKE PHOTOGRAPHY. WHEN YOU HAVE A CAMERA, YOU LOOK FOR LIGHTING AND SUBJECTS AND TIMING TO MAKE IMAGES THAT REFLECT YOUR WORLD. HAVING THE CAMERA MAKES YOU MORE AWARE. MORE CURIOUS. MORE PATIENT.

stopped me immediately and pointed out my error.

The takeaway? Practicing critical thinking and reflecting on ethics is learned in layers and must be kept sharp with constant practice. This rehearsal is crucial to good leadership.

It is done to make sure your decision-

making *flow* is effective and produces the best result.

Ethics is a truly human function, based on a *win/win* where the best outcome for others is also the best for you. As author Rush Kidder said, “Ethics is not blind impartiality, doling out right and wrong according to some stone-cold canon of ancient and immutable law. It’s a warm and supremely-human activity that cares enough for others to want the right to prevail.”

As humans age, we find comfort in patterns, in predictability. This comfort means we act within a narrow range of thinking – a narrow range that reduces the available tools when we make decisions. In our new pandemic world, we need all of the decision-making tools possible at hand. More tools cause us to be more aware, giving us the necessary flexibility to see differing angles from objective viewpoints.

It is like photography. When you have a camera, you look for lighting and subjects and timing to make images that reflect your world. Having the camera makes you more aware. More curious. More patient. When you have a broad set of decision-making tools, you become more aware. More confident in the outcomes you have a hand in. Wiser.

Ethical fitness comes from personal character, a concept often defined as who you are when no one is looking. Lord Moulton described ethical awareness in a 1924 essay in *The Atlantic Monthly* as “obedience to the unenforceable.” I think Moulton makes a good point. We each have the abilities to govern our actions, but we need to keep those abilities in good form. Therefore, practice is required.

The tough choices don’t center on right versus wrong. They involve right versus right. They are genuine dilemmas precisely because each side is firmly rooted in our basic, core



values. We can call right-versus-right choices *ethical dilemmas*. They are:

1. Truth versus loyalty
2. Individual versus community
3. Short-term versus long-term
4. Justice versus mercy

How do we resolve these dilemmas? There are three basic ways:

Ends-based thinking. This is best known by the phrase, *Do whatever produces the greatest good for the greatest number of people.*

Rule-based thinking. This means following only the rules or principles that you want everyone else to follow.

Care-based thinking. This is the Golden Rule: *Do to others what you would like them to do to you.*

My call to action is to practice using your tools in daily living so that when a significant crisis hits, you are comfortable in your actions. Be ready, be open-minded, be flexible. This is where practice makes perfect. Just like taking a photo at the decisive moment. A moment before or a moment after, and the result is not the best. ■



Karl Ahlrichs, SHRM-SCP, SPHR, CSP, is a professional generalist who advises associations on their people issues. Karl's experience is ideally suited to times of organizational change as he pulls on risk management and organizational development theories to replace *best practices* with *next practices*. Karl will be presenting at the WSAE 2021 Spring Fore-ward.

SPRING FORE-WARD KEYNOTE

Recruiting, Retaining, Engaging Members in a Changing World

by Jim Lindell, CSP

Some of you may recall the Saturday Night Live skit about The Olympia Restaurant with actors John Belushi, Dan Ackroyd and Bill Murray. Regardless of what the customer ordered, John Belushi would respond with “cheeseburger, Pepsi and chips.” When the customer pushed back, Belushi would repeat “cheeseburger, Pepsi and chips.” We have to be careful with our associations that we do not become so narrowly focused. Our members and prospective members may view us as only providing “cheeseburgers, Pepsi and chips.” Associations cannot get stuck in the *we have always done it this way* mode.

Another example illustrates membership concerns: If you consider mainline denominations, the number of people regularly attending church has consistently declined for many years. According to Gallup, in 1955, 73% - 77% of people in all age groups attended church within the last seven days. In 2017, the 21-29 age group had declined to 25%, while the over-60 age group had dropped to 49%. Dogmatic people will say there's no need to change the church and its message because it is consistent over the years. The problem is the members in the church have changed, and they seek a different experience.

Associations must understand what the customer wants, and then adapt the association to meet and exceed those needs. And if you're going to delve deep, we must go beyond

I REMEMBER GOING INTO BEST BUY TO PURCHASE A LOW-END LAPTOP. THE YOUNG SALESPERSON DIDN'T WANT TO SELL AN INEXPENSIVE MODEL BECAUSE IT WAS INADEQUATE FOR GAMING PURPOSES. I HAD NO INTENTION OF USING A LAPTOP FOR GAMING.

meeting or exceeding the customer's needs or expectations and identify and eliminate their pain.

I remember going into Best Buy to purchase a low-end laptop. The young salesperson didn't want to sell an inexpensive model because it was inadequate for gaming purposes. I had no intention of using a laptop for gaming. The sales-

person's biases created an inaccurate perception for him.

Associations have done a great job helping members in the past. They have beliefs, practices, services, continuing education, conferences, etc. Unfortunately, that world has changed, and had already begun to change even before COVID-19. We must identify what is necessary to attract members, engage them in activities they value, and increase their long-term commitment to the association.

At the Spring Fore-ward, we will explore how neuromarketing and identification of the association members' pain are necessary actions for associations to succeed in our new abnormal world. ■



Jim Lindell, CSP, is the President of Thorsten Consulting Group, Inc, a Wisconsin based provider of strategic and financial consulting, professional speaking, training and executive coaching. Jim will be presenting the keynote at the WSAE 2021 Spring Fore-ward.

More Than an Eight-Hour Zoom Call

Hybrid event planners share success stories

by Kyle Geissler

We know how to execute our in-person events, and we've now had a lot of practice with online events. But the notion of combining the two, or doing them concurrently, is a daunting one.

Hybrid events are not only a reality in this environment of changing public health concerns, but could also be an important part of a future in which we maximize our potential outreach to members.

As part of the 2021 Virtual Road Show, WSAE recently gathered a panel of event organizers who have learned firsthand what it takes to put a hybrid event together and successfully connect with members.

Key takeaways

Connect-o-Grams. Make the event remarkable for your virtual attendees by sending them an event package. In the case of Association for High Technology Distribution, Executive Director Leigha Schatzman said they came up with "Connect-o-Grams" which contained coffee and other swag, a code to the event's mobile app, a luggage tag with information about their next in-person event and a bingo card to encourage engagement. Attendees shared their winning bingo cards and the association even came up with an

[EVEN THOUGH THEIR PRESENTATIONS MAY HAVE BEEN PRE-RECORDED,] SPEAKERS WERE CONNECTING WITH ATTENDEES IN THE ONLINE CHATROOM WHILE THEIR PRESENTATIONS PLAYED OUT, AND THEY WERE AVAILABLE TO TAKE QUESTIONS VIA LIVE VIDEO AFTER THE PRESENTATION.

award to send to the bingo winners which, of course, was called the *Connect-o-Grammy*. They also sent remote attendees a name tag for one of their fellow attendees, encouraging them to connect with each other online.

Project your plans. Make sure your members know your hybrid event is "more than an eight-hour Zoom call." This advice comes from Eric Lanke, CAE, President and CEO of the National Fluid Power Association. Members' eyes might glaze over when they think of a hybrid event, but Lanke said it's important that you carefully market your hybrid event to illustrate the networking and engagement opportunities it will provide.

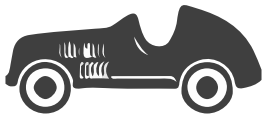
Leverage the format. Take advantage of the flexibility hybrid events give you. Ashley Medeiros, CMP, Senior Manager of Discover the Palm Beaches, had a speaker unable to appear in-person at the last minute. Because the event was hybrid, the speaker was still able to join, and the agenda remained intact. In her case, Medeiros' event had presenters appearing in person and online, providing multiple options for speaker presentations.

Font size. This is clever, but simple. Jeanne Deimund, Associate Executive Director of the Wisconsin Association of School Business Officials, held two hybrid events during the pandemic and increased the font size on the name tags so they could be more easily read while social distancing. Many remarked that they liked this idea to use even after social distancing is just a memory.

Zoom is for work. Tom Graybill, Vice President of Sales at Tri-Marq chimed in to ask that organizers consider alternatives to Zoom. He said we now associate Zoom with our day-to-day jobs. To communicate to attendees that this is something different, you should consider a different platform. He also said, "No platform is perfect."

Provide a preview. If you are using a platform most people won't be familiar with, consider offering your attendees, speakers and exhibitors a preview day. If the platform allows, create an open house event for registrants to login,





make sure their hardware works, set up a profile and find their way around. Lanke said that while not many attended their open house, those who did got something out of it.

Prepare your team. Hybrid events are, for many, an all-hands-on-deck affair. That was the case for Medeiros who said the workload made it more important than ever that the team communicate efficiently. She wanted to make sure everyone knew what was going on in case she or anyone else was suddenly unavailable.

Engage your speakers. It's common in a hybrid or on-line setting for a speaker's presentation to be pre-recorded. This takes a lot of risk out of the equation, but it doesn't have to limit engagement. Lanke said at their event, speakers were connecting with attendees in the online chatroom while their presentations played out, and they were available to take questions via live video after the presentation. He called this the most successful part of their event.

The cannibalization question. Before the pandemic, the natural resistance to holding online or hybrid events was the concern about cannibalizing your in-person events. In the near term, it seems that the pandemic might have eased concerns on this front as many of the panelists spoke optimistically about the role of online and hybrid events going forward. Lanke said there are many reasons for people to come to a conference and the pandemic has ended his concern about cannibalization. He said online options offer an unparalleled opportunity to extend your reach. Schatzman was among those with the same concerns before the pandemic, but she expects to offer members more virtual options going forward. Deimund said they too realize that virtual options help them reach a wider audience.

Conclusion

Is the future online? Is the future in-person? It's both. Associations find themselves in a position to make the best of both options for the benefit of their members. We're just getting started. There's so much more we will learn from each other in the years to come. ■

The session was moderated by Megan Denhardt, CAE, DES, President of Denhardt Productions.



Kyle Geissler is Director of Operations and Public Affairs at Wisconsin Broadcasters Association. Kyle is a member of WSAE and a member of the *VantagePoint* Editorial Council.

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Back Together Again

How the Wisconsin Hotel & Lodging Association pivoted back to in-person events

by Bill Elliott, CAE

Last year signified a test of leadership and agility for any of us working in the association space. We had to scramble to figure out how to deliver value to our members in a world where they were locked inside their homes and uncertain about their futures. We had to figure out how to manage the fallout from reduced event, sponsorship and membership revenue. We had to figure out how to leverage technology in new and creative ways. On top of that, we had to work to keep our staff motivated and engaged. One thing was certain – not being able to be together in-person fundamentally changed the way we had to do business.

In my role as the President and CEO for the Wisconsin Hotel & Lodging Association (WH&LA), my member hoteliers were, of course, among the industries hit the hardest by the pandemic. We, too, had to figure out how to get our member properties the information and resources they needed to operate in this new way of doing business. While webinars and video calls were

PEOPLE SEEM TO BE A BIT MORE USED TO ROLLING WITH THE PUNCHES AS A RESULT OF THE PANDEMIC, AND ATTENDEES WERE JUST HAPPY THAT WE LET THEM KNOW WHAT WAS GOING ON. THE KEY TO ALL OF OUR SUCCESS WAS PLANNING AND COMMUNICATION.

a great stopgap measure, it became clear that there was a strong preference for us to get back together in person as soon as we could do so safely. Throughout summer, we maintained hope that we could hold a November event in person, and we started laying out plans for COVID-mitigating protocols and format changes. In September, we made the painful decision to postpone our conference from November to March, and to reshape it into an event quite different from our traditional annual conference. The event was successful in many ways, thanks to the diligent work that came from our host hotel, volunteer leaders and WH&LA staff.

As soon as we made the decision to reschedule, we worked closely with the venue to set new dates and to talk through what an event could look like in March. By then, the American Hotel & Lodging Association (AHLA) had launched the Safe Stay™ initiative, focused on enhanced hotel cleaning practices, social interactions and workplace protocols to meet the new health and safety challenges and expectations presented by COVID-19. Created in accordance with guidance issued by public health authorities, including the Centers for Disease Control and Prevention, Safe Stay™ was adopted by state associations like ours, as well as all the major hotel chains in the U.S. This guidance was helpful to us as we started our planning process. AHLA recently updated the initiative with a Meetings & Events Checklist, which you can review at www.ahla.com/safestay.

After making sure our staff understood the policies and procedures our host hotel, the Hyatt Regency Green Bay/KI Center had in place to safely serve our members, we realized it would be equally as important for our members to understand it. We quickly changed the cover story of our quarterly membership magazine to be a three page interview with the hotel's Director of Sales and Events.



It included topics such as: how they communicate hotel policies with guests, how their employees take a daily temperature check when they walk in the door, how food and beverage would be prepackaged in lieu of traditional buffets, and how room sets had changed to accommodate social distancing. This undoubtedly let people know that we were taking the precautions seriously, and helped provide them peace of mind.

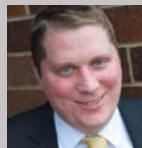
As the date of the event approached, we published our attendee *Code of Conduct*, outlining expectations for all attendees – from our mask policy, to social distancing requirements to the general precautions people need to take anywhere they go to stay safe. We also provided steps to take if an attendee fell ill while attending the event or in their hotel room. Again, with all of this communication, we showed our attendees, exhibitors and staff that their safety was our top priority.

And, I'm glad to report that there were zero times where staff had to ask someone to put a mask on.

Behind the scenes, there was obviously a ton of work to do to adapt to the new situation, including reconfiguring our schedule and sessions, identifying COVID-related signage needs and transitioning our trade show into a speed networking event and tabletop marketplace. We were constantly revising and tweaking the plan to ensure the event would be successful.

We had to continue to roll with the changes once onsite. We got a call from one of our speakers, who had fallen ill with COVID-19 and couldn't make it anymore. I instantly had flashbacks to a conference years ago where I had put in a last minute "professional speaker" to substitute for another who had cancelled – it was a complete disaster. Admittedly, this was one road bump we hadn't planned for. We consulted with our Conference Chair and decided just to cancel the session and slightly modify the schedule. What we found was exactly what I had suspected – people seem to be a bit more used to rolling with the punches as a result of the pandemic, and attendees were just happy that we let them know what was going on. The key to all of our success was planning and communication.

At the end of the day, I'm proud of the event that we ran, and I'm even happier about the message that we are sending to society: our hotels are ready to welcome you and accommodate you safely when you feel ready to travel. ■



Bill Elliott, CAE, is President and CEO for the Wisconsin Hotel & Lodging Association (WH&LA), a WSAE member.

WSAE | WH&LA

Association Events



2021 Meeting Survey

Without a doubt - associations want to meet in person.

79%
plan to hold their next large in-person event in 2021

33% report they are planning an event in the first half of 2021

Survey of WI-based Association Executives

50% believe their next large event will have a virtual component

42% believe their event attendance will be decreased

87% will hold their next board or committee meetings in-person in 2021

A staggering 58% will do so in the first half of the year

#
24 Associations participated in this survey

3 Local | 11 State
5 National | 5 International

75%
rely on events for a significant piece of their revenue

Without a doubt, associations depend on in-person meetings for survival

Survey Partners




March 2021

Virtual Advocacy Days Are Here to Stay

by Stephanie Vance

Someday soon, the traditional lobby day will return. Advocates will come to state capitols to enjoy all the benefits they have to offer and, of course, to meet with their legislators. But that doesn't mean the virtual lobby day will disappear. In fact, the last year has taught us that these events can be as, or even more, effective than in-person events – and that they're here to stay.

Moving to a virtual format (or integrating that approach into your in-person event) has its pros and cons. On the one hand, the vast majority of the groups we're working with have seen advocate participation skyrocket

FOR A LARGE EVENT, YOU'LL NEED AT LEAST FIFTY VIDEO/AUDIO CONFERENCING LINES AS WELL AS A SYSTEM FOR COORDINATING THOSE LINES ACROSS MULTIPLE MEETINGS. YOU REALLY DON'T WANT ONE GROUP OF ADVOCATES CALLING INTO THE WRONG MEETING BECAUSE THOSE TWO GROUPS WERE ACCIDENTALLY ASSIGNED A ZOOM LINE AT THE SAME TIME.

in this virtual environment. It's significantly easier for advocates to participate in a phone call than an in-person meeting. With the right follow-up, you can translate that increased interest and momentum into a stronger advocate base. You can also engage advocates at any time of year by pairing these

events with your annual conference, board meetings and trade shows.

That said, virtual events are much more challenging to coordinate than most people realize. Following are five tips to get you going in the right direction.

Get the Technology in Place. We all know to do a test run on the technology before an event – the hard part is getting that technology in place! This is one of the biggest challenges any organizer will face. For a large event, you'll need at least fifty video/audio conferencing lines as well as a system for coordinating those lines across multiple meetings. You really don't want one group of advocates calling into the wrong meeting because those two groups were accidentally assigned a Zoom line at the same time. This happens most often when an office changes a meeting time and, just like that, one line is now being used for two different meetings. We've found it essential to maintain a reserve of three-hundred Zoom lines for the thousands of meetings we're scheduling this spring.

Avoiding Pitfalls. Video backgrounds, online chats and, of course, pants can make or break a meeting's success. Be sure your advocates know to tone down any political or inappropriate backgrounds, avoid posting comments where staff or members can see them in the video platform, and... wear pants.



Setting Expectations. For most of the groups we're working with, we're finding that legislative staff and members prefer to join by audio-only, so prepare your advocates for this eventuality. This happens for a variety of reasons, most of which have nothing to do with what your advocates might suspect is multitasking.

Managing Office Pet Peeves Part 1 – Not Having a Plan. Reading body language is challenging on a video call and impossible in an audio-only conference, which means that having a strategy for each meeting is even more essential in a virtual environment. No one enjoys those awkward moments of silence interrupted by several people talking at the same time. Be sure to have a leader for each meeting who knows how to deliver the ask and has coordinated with others on the call about who has compelling local stories to share.

Managing Office Pet Peeves Part 2 – No Shows. It's much easier for an advocate to skip joining a phone call from the safety of their couch than it is to skip a meeting they've flown (or driven) to the state capital for. Nothing irritates a legislative office more than no shows, unless it's

a constituent no show. Be sure your scheduling process includes sending a calendar invite for both advocates and legislative offices, and have a system for sending reminders before the event. We find that some combination of 48-, 24- and 1-hour reminder e-mails and an automated system for notifying advocates of meeting time changes can dramatically reduce the *no show* problem. And stress to those advocates who are constituents the importance of showing up or calling to cancel.

Virtual advocacy events are here to stay, either as stand-alone efforts or as one component of a hybrid event. Hopefully these tips and techniques will help you coordinate the best event possible. ■

Stephanie Vance is a founding partner and CEO of Advocacy Day Services at Advocacy Associates. Visit their website for more information: www.advocacyassociates.com. Stephanie can be contacted at svance@advocacyassociates.com.

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Keys to Hosting a Successful Virtual Fly-In

How to build community, expand engagement and harness momentum

A virtual fly-in (sometimes also called a Lobby or Hill-Day) is a great way to move your issues forward. While organizations have long relied on face-to-face meetings, a digital fly-in or lobby day has advantages. It can lower costs, increase your reach and dramatically expand participation among your advocates.

The fly-in has always been a great tool to communicate on policy. But it has never been easy. Convincing dozens – sometimes hundreds – of supporters to journey to Washington or a state capital, often at their own expense, is an extreme logistical challenge.

A virtual fly-in can smooth that process. Attending meetings and taking action online is far easier and cheaper than traveling to talk to lawmakers. Many organizations find that their virtual lobby day draws far more participation from supporters than a traditional fly-in. And why not? There's far less friction.

While there is organization required for any fly-in, traditional or virtual, a digital experience can attract more people and eliminate the variables associated with travel. The result is an event that can be easier to coordinate.

“The organizations we work with are doing great things in the virtual arena,” said Jeb Ory, CEO and Co-Founder of Phone2Action. “Some are getting meetings with hundreds of lawmakers and having their supporters take action on a digital campaign – all in the same day. While nothing can replace a face-to-face meeting, virtual fly-ins are extremely effective.”



Why you should host a virtual fly-in

There are several good reasons to host a fly-in or lobby day, all of which relate directly to your mission.

It builds community. A fly-in allows your organization to create a sense of community around your issues. It shows your audience that they are not alone, gives them an outlet to raise their voice and a way to take action that can make a difference.

It highlights legislative priorities. A fly-in gives you the opportunity to highlight your organization's legislative priorities to both your supporters and key lawmakers.

It generates personal stories. Few communications resonate more than authentic personal stories. A fly-in or lobby day is a great opportunity to harness these, allowing your audience to speak for themselves. Whether delivered on a call or via email, these stories provide lawmakers with the anecdotes they need to support policy positions – and they come directly from constituents.

It demonstrates value. A fly-in shows your program is strong and active, representing your supporters and directly addressing lawmakers. A solid fly-in helps grow your relationship with both.

How to host a virtual fly-in

The key to a successful fly-in or lobby day is to create a sense of community among your supporters, get that community excited and then direct that excitement toward certain actions.

Educate your audience. Host video calls or webinars with your advocates to explain your policy positions. These training sessions can unite people and emphasize the importance of taking action. It's also a nice way to get people excited in the weeks before your event and to kick things off on the Big Day.

Establish meetings with lawmakers. Setup meetings between your supporters and the lawmakers who represent them. It is common for organizations to send a small team to meet with a lawmaker or staffer, but that team must be made up of constituents who are well-trained on your policy priorities and have clear talking points to deliver. Wasting a lawmaker's time is a major mistake.

Follow up consistently. Motivate advocates with reminders via text, email and social media – especially

those who agreed to meet with lawmakers. If they signed up, they must show up. Automate reminders to make it easy. Make sure your supporters also have digital materials to “leave behind” after their virtual meetings.

Enable different ways to participate. Not everyone who supports you will be ready or willing to meet with a lawmaker. Give your audience different ways to participate, such as sending an email, making phone calls, signing a petition, contributing a personal story or posting on Twitter and other social platforms. A high-priority call to action on your lobby day can ensure that everyone who participates also takes action to deliver a message on your top issue.

Create buzz across channels. Your fly-in is about more than meetings. Build momentum via a pledge campaign and send out registration links in advance of the event. Publicize the event on your website and social media channels. Share your lobby day over SMS or on messaging apps such as Whatsapp, which has 1.5 billion monthly users. For those who are meeting with lawmakers, you can easily create a group to share your information and keep people organized.

Collect personal stories. Collect written personal stories from your advocates, the type of stories that resonate with lawmakers. After these stories are collected, you can use them as part of your messaging by asking the advocates to record brief audio or video messages and posting them on social media and your website, or highlighting these stories in upcoming communications.

Host a social media takeover. Shift all focus on your social channels to the fly-in or lobby day. Share personal stories contributed by advocates and pictures of advocacy-from-home. Post a keyword people can text to join the action. And, of course, don't forget hashtags.

Share your success. Report back to your audience on the success of the event when it is finished (or even as it is underway). Share numbers, pictures and show your appreciation. It's important to celebrate your success. ■

This white paper is provided by **Phone2Action**, offering a single solution for Public Affairs and Government Relations. Their expanded suite of products cover all technology needs of government relations and public affairs teams to operate with confidence. More information can be found on their website: <https://phone2action.com>

A Virtual Fly-in Checklist

Everything you need to get ready for the Big Day

- ✓ Plan the activities and calls to action that will be included in your virtual fly-in or lobby day (start early).
 - Include all relevant departments in your planning.
 - Include different ways to participate and the timing and cadence for each:
 - Meet lawmakers virtually
 - Email public officials
 - Call public officials
 - Tweet public officials
 - Sign a petition
 - Tell us your story
 - Schedule a call or webinar (perhaps several) with supporters to educate them on your legislative and regulatory agenda.
 - If you hope to meet with lawmakers or staff, schedule it in advance to ensure their participation.
- ✓ Create the content you will need to promote your event:
 - Blog posts
 - Social posts
 - Email copy
 - Landing pages
- ✓ Announce your virtual fly-in or lobby day to your supporters using email, text, social media and posts on your website. Solicit their participation.
- ✓ Setup reminders, updates and other automated communications you need to promote your event in advance and to activate supporters on the Big Day.
- ✓ Consolidate your activities in a single action center, which supporters will use to participate:
 - Blog posts
 - Social posts
 - Email copy
 - Slide decks for calls
- ✓ Create the content you will need to hold the event itself, and to thank participants and public officials afterward.
- ✓ If you are holding a call with supporters or a town hall with lawmakers, schedule a preview call and a run-of-show for the participants.
- ✓ Establish a detailed list of tasks for your staff on the Big Day, so that all bases are covered:
 - Meetings and logistics
 - Content creation and updates
 - Story curation
 - Social media monitoring and interaction
 - Answering supporter questions
 - Interacting with lawmakers and staff
 - Keeping participants updated on numbers and results
- ✓ On the day of the event, share updates and encourage participation.
- ✓ Report the results the day after so that participants know what they achieved.
- ✓ Thank everybody involved:
 - Supporters
 - Outside participants
 - Lawmakers and staff

Lessons From Komen's 2020 Virtual Fly-in

When Susan G. Komen faced the prospect of conducting its annual Washington lobby day in a virtual environment last year, there was no playbook.

The fly-in usually involves hundreds of advocates traveling to the Capitol, often at their own expense. Collectively, they visit hundreds of offices in the U.S. House and Senate.

What would that look like in the virtual world?

“We had to scramble and adapt to the new setting,” said Valerie Nauman, Senior Coordinator for Federal Policy and Advocacy.

What the organization found was that a virtual fly-in can be highly effective if engineered and executed correctly. Komen’s training reached a nearly 600-person audience and they created 40 teams of three to five people who carried out more than 150 virtual congressional meetings – all in a single day.

“It’s hard work and a lot of organizing to make sure everything is straight,” Nauman said. “But people shouldn’t underestimate the power of a virtual Hill Day.”

Creating real capability

Nauman and Komen’s advocacy team began weeks in advance to develop a strategy that included education, organization and high-impact tactics.

- **Webinars.** The team held multiple webinars to level-set and educate advocates who would participate in the virtual fly-in. Now, those webinars are digital assets that can be used to train more supporters.
- **Digital Hub.** Komen maintained a digital resource where participants could find schedules, talking points and anything else they needed.
- **Materials.** Komen generated materials for lawmakers and staff on Komen’s policy points, which expedited meetings. “Advocates could have deeper conversations

with offices,” Nauman said, “They weren’t having to educate first.”

- **Personal Stories.** Many of those conversations focused on personal stories from breast cancer patients and survivors. One benefit to the virtual event was that advocates undergoing active treatment, who often have a hard time traveling, could participate in full. “Those are the voices that are most important,” Nauman said.
- **A Virtual Day of Action.** A virtual call to action reinforced the messages shared in congressional meetings, sending emails to lawmakers from hundreds of additional advocates.

Of course, the fly-in supported Komen’s year-round advocacy work to increase federal funding for programs like the National Breast and Cervical Cancer Early Detection Program and secure

better care and treatment for the estimated 264,200 women and men in the U.S. who will be diagnosed with breast cancer and the 44,130 who will die from the disease in 2021 alone.

In 2020, Komen drove more than 84,000 supporters to take action. The action center on its website alone drew almost 50,000 visitors. Nauman said they will definitely host another virtual fly-in this year.

“We feel like it was a success,” she said. “This was the first time that we did anything like this, on this scale. We definitely want to build on it.” ■

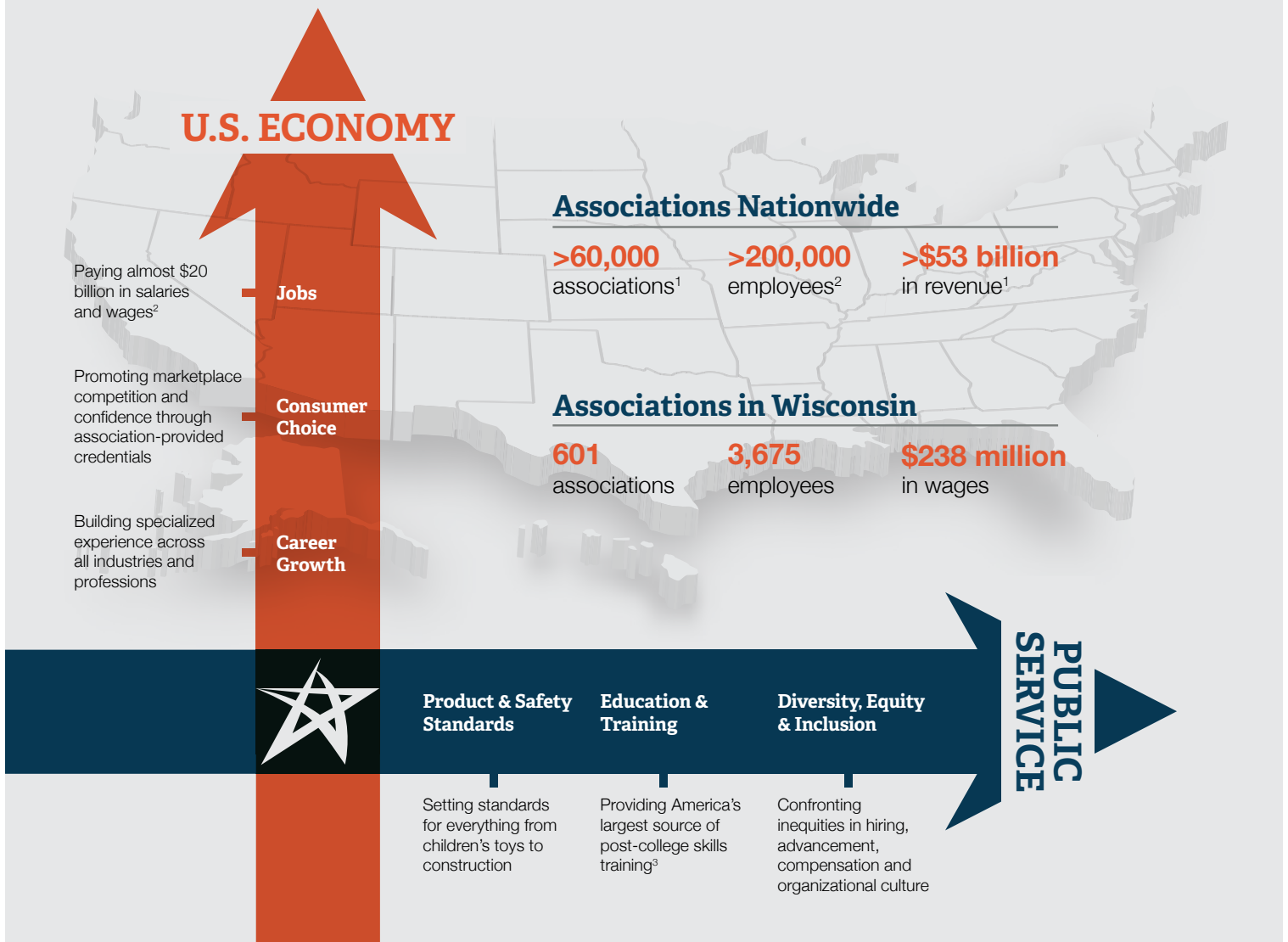
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This case study is provided by **Phone2Action**, offering a single solution for Public Affairs and Government Relations. Their expanded suite of products cover all technology needs of government relations and public affairs teams to operate with confidence. More information can be found on their website: <https://phone2action.com>

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¹ IRS Data Book 2019. North American Industry Classification System (NAICS). U.S. Census Bureau.
² Bureau of Labor Statistics. 2019 Annual Averages. Quarterly Census of Employment and Wages (QCEW).
³ IRS Data Book 2016. NAICS (North American Industry Classification System). U.S. Census Bureau.



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Mitigate Legal Exposure While Returning to In-person Events

"Ask the Expert" legal feature

by Ann Barry Hanneman

Q1: As an employer, can I require my employees to travel or attend in-person events during the COVID-19 pandemic if those responsibilities are expected job requirements? Can I require they get the COVID-19 vaccine before resuming those work responsibilities?

A: Requiring travel and in-person events is a challenging issue now, particularly given the safety concerns about the COVID-19 pandemic and increasing optimism due to greater access to the COVID-19 vaccine. To reduce liability and assure employee safety, employers should continue to adhere to the current safety and health guidelines applying to these activities (including those from OSHA and the CDC), adopt conforming policies and enforce consistent practices.

In most cases, depending upon your business objective, it may be best to encourage (but not require) those employees to get the COVID-19 vaccination, while requiring compliance with all applicable guidelines that apply to these activities.

Requiring travel and in-person events during the pandemic. The CDC's General Business Frequently Asked Questions, located at www.cdc.gov/coronavirus/2019-ncov/community/general-business-faq.html, address required travel and meeting requirements, urging employers to carefully consider whether each is necessary. The CDC provides, "when videoconferencing or teleconferencing is not possible, hold meetings in open, well ventilated spaces, and space chairs at least six feet apart. Encourage staff and attendees to stay home if sick."

The CDC also outlines specific measures that should be adopted before requiring any employees to travel. These precautions include the following:

- Schedule travel to limit distance and need for overnight lodging.

- Identify hotels that disinfect rooms between stays and regularly disinfect surfaces in common areas.
- If flying is necessary, select seats on flights that provide the greatest distance between other travelers and choose direct flights (if possible).
- Make sure employees are provided with necessary supplies and understand protective measures they can take while traveling, including:
 - Practice social distancing by maintaining at least six feet from others.
 - Wear cloth face coverings when difficult to social distance.
 - Use disinfecting wipes to clean commonly touched surfaces inside vehicles and airplanes.
 - Wash hands or use hand sanitizer regularly.
- Ensure employees know if they get sick they should stay home (not travel) or return home (if traveling), provided it is feasible for them to travel without endangering themselves or others.
- Make sure employees know whom to contact if they are sick.

As recommended measures concerning travel and meeting attendance change, employers should modify their COVID-19 policies accordingly and hold employees accountable for compliance with current safety measures. In addition, employers should document the reasons for requiring travel and meeting attendance, if these requirements are ever challenged.

Mandating the COVID-19 Vaccine. Employers can require certain employees to receive a COVID 19 vaccine based upon job duties, so long as all federal, state and local nondiscrimination laws are followed. An employer's policy must allow reasonable accommodations for employees with disabilities and/or religious beliefs that prevent receipt of the vaccine as required under the ADA,

GIVEN THE COMPLEXITY OF ISSUES ASSOCIATED WITH MANDATING VACCINATIONS AND CURRENT CLIMATE, HUMAN RESOURCE EXECUTIVE REPORTED TWO SURVEY RESULTS SHOWING THAT FEWER THAN 10% OF ORGANIZATIONS PLAN TO REQUIRE EMPLOYEES TO GET VACCINATED, BUT MOST PLAN TO INSTEAD ENCOURAGE VACCINATION THROUGH EDUCATION, INCENTIVES AND MORE.

Title VII and other state or local law equivalents. For further discussion of these prohibitions under the federal laws, see Section K at: www.eeoc.gov/wysk/what-you-should-know-about-covid-19-and-ada-rehabilitation-act-and-other-eeo-laws.

Given the complexity of issues associated with mandating vaccinations and current climate, *Human Resource Executive* reported two survey results showing that fewer than 10% of organizations plan to require employees to get vaccinated, but most plan to instead encourage vaccination through education, incentives and more. <https://hrexecutive.com/research-most-employers-unlikely-to-mandate-covid-19-vaccinations>.

Business Considerations. The legal risks associated with mandating the vaccine must be carefully considered and compared to its benefits. Particularly given OSHA's current safety directives require employers to maintain all safety precautions (regardless of whether employees received the vaccine), the safer course of action may be to encourage those employees required to travel and attend in-person meetings to get the vaccine, while proceeding to assure these employees stick to following the recommended safety precautions.

Q2: What Recommended Measures, If Any, Should Associations Take When Hosting In Person Events?

A: When planning for in-person meetings, member activities and conferences (if such meetings cannot be held virtually), associations should follow recommended safety precautions and comply with any laws imposed by federal, state and local governments (like a face mask requirement, public gathering limitation or travel restriction mandate). While there is no employer/employee relationship with attendees, associations are encouraged to adopt the safety recommendations provided to employers for planning safe meeting and conference activities.

To minimize legal exposure during the pandemic, consider the following:

- Work with hosting venues to assure basic safety precautions are implemented.
- Communicate to attendees the safety precautions taken and those expected to be followed (on premises and/or in advance), including non-participation when ill or experiencing symptoms.
- Consider feasibility of imposing temperature checks.
- Consider requiring a narrowly-focused waiver that only addresses COVID-19-related physical injury, as broader waivers are unlikely to be enforceable.



I hope this provides useful tips while beginning to plan in-person events. Although circumstances will change depending upon the type of event and venue, it is important to stay up to date on these recommended protocols. If I can be of further assistance to you, please contact me at (262) 923-8652 or at ahanneman@vonbriesen.com. ■

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 these Ask the Expert questions 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.

Executing the Plan After the Retreat

by Bob Harris, CAE

An association executive said, “The board adopted the strategic plan, now they look at me as if I am the one to achieve the results.”

The complaint is universally familiar – Whose responsibility is it to execute the plan?

Frequent Scenario

A planning retreat is scheduled about once every three years. Holding an annual retreat socializes the board to think only 12 months at a time. For greatest impact, a board should be setting goals for three to five years from now.

The plan is intended to be a roadmap for successive boards. It should deter incoming officers from changing priorities each year. A plan is not a wish list or staff to-do list. A good plan communicates value to members and prospects. It empowers the committees and staff to advance the programs.

TRANSFORM THE PLAN TO
COMMUNICATE VALUE TO MEMBERS.
DESIGN IT TO FIT ON A POP-UP
BANNER, POSTER, BUSINESS CARD,
BROCHURE, PDF, DOORKNOB
HANGER OR ROOM KEY AT
THE CONFERENCE.

After the Retreat

Many plans go on a shelf to collect dust until a director asks, “Whatever happened to the plan we created?”

This article clarifies responsibilities for executing the plan after the retreat.

Role of the Facilitator: The plan should be documented as a concise

report. Leaving it on flip chart pages to store in a closet is sudden death. Expect a draft to be available within two weeks while discussions are still fresh in everyone's minds, in order to make enhancements.

The facilitator should advise on next steps and be available to answer questions about implementation. It may be beneficial to have the same person facilitate a staff retreat.

Role of the Executive Director: The executive will want to meet with staff to advise them what priorities the board has set. Staff may have anxiety about the board setting new directions.

A program of work will be developed after the retreat. It usually takes the form of a horizontal spreadsheet breaking down the board's goals into monthly or quarterly deadlines for committee and staff work. Some groups color code the program of work with green, amber, and red to track progress.

This will include accountability of individuals, timeline expectations and interim performance metrics. For example, to increase membership by five percent, the membership committee will have to enroll seven members per quarter.

Transform the plan to communicate value to members. Design it to fit on a pop-up banner, poster, business card, brochure, PDF, doorknob hanger or room key at the conference.

Role of the Chief Elected Officer: Soon after the retreat, ask the board to pass a motion to approve the new plan. Keep it on the board table to frame discussions.

Include it on meeting agendas for updates. Appoint a director to serve as the *strategic plan champion* to report on progress. Frequently ask, “How does this motion advance our strategic plan?”



Goals without financial resources are unlikely to succeed. Meet with the treasurer or finance committee to discuss the new plan's impact on budget. This may be the time to make use of reserves.

Integrate the plan into the board meeting agenda. Include the mission statement at the top or bottom of the agenda. Replace the time spent on listening to reports with a focus on strategic goals.

Bylaws authorize the board or chair to appoint committees. Analyze how existing committees fit within the new plan. This is the time to merge, eliminate or appoint committees to align with the goals. Convene the committee chairs to discuss how they have a critical role in advancing the mission and goals.

Promoting accountability is a responsibility of the board chair. Allocate time to review and tweak the plan each year.

If after the retreat the board looks at their executive director to advance the strategic plan, they may not fully understand the purpose and value of a plan. ■



Bob Harris, CAE, provides free governance tips and templates at www.nonprofitcenter.com.

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Elkhart Lake, WI

Chair's message, continued from page 2.

WSAE continues to offer a robust list of webinars to keep you sharp and on the cutting edge of industry trends and best practices. And there's something for everyone! I find that while I'm often unable to attend the live event, I'm so grateful to have access to archived events. I just registered for one on work and life balance. After all, who can't use a little help in that area right now?

Our CEO Cafés have continued through the pandemic with lively, informative, and oh-so-relevant conversations. Based on the healthy attendance numbers, it is obvious we need each other now more than ever.

Please promote all the above events and offerings to your teams and peers. The more involved our members are, the more value WSAE provides.

I'd like to offer a shout out to the *VantagePoint* Editorial Board and Kristin McGuine for their work on this publication. The content is heartier and more timely than ever.

I extend a special thank you to *all* of our WSAE members. The list of members in the last *VantagePoint* was most impressive. Know that we appreciate you and don't take you for granted.

I also extend a specific welcome to all of our new members. We hope you will be inspired by all the education and networking you will experience!

As I mentioned above, WSAE offers something for everyone. It is truly an inspirational and collaborative group that not only makes our jobs easier and our work better, but further reminds us that people are good.

I hope to see you soon at a WSAE event! ■



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The Brilliance of Resilience: Building a Personal Stress-Busting Strategy

by Jacy Imilkowski, PMP, ACC, CLL

Picture this: It's time for your morning meeting, and you're stressed. You managed to complete the report you had due, but only by taking time away from other critical projects with upcoming due dates. Honestly, you'd rather be working on those other projects than going to this meeting in the first place. That gets you thinking about how you're going to get all that done and have enough time and energy for life outside of work too.

As the overwhelm builds, the voices in your head kick in:

"Why did I take this project on to begin with? I don't have the time. I should've just said no!"

"We don't even need this meeting! I know the best way to do this. If people would just listen to me this would be done faster."

"Oh no... I think I forgot a sentence in that report! I already sent it and everyone is going to see the mistake and think I'm an idiot!"

"This always happens to me! I always get extra work to do and not enough help with it. It's not fair!"

No judgement if you've ever said these things (or anything else along these lines), because, in full transparency, each one of those responses is one I've had over the years. And I know I'm not alone here! When stress kicks in we all fall into our own personal, negatively-focused stress patterns. Even though these habitual stress responses actually compound our stress rather than help us resolve it, we expend so much of our precious time and energy engaging in them.

Now imagine what it would be like to understand your personal stress responses and have an immediate tool on hand that was customized just for you to help you respond positively and constructively to stress instead.

Sounds amazing, right? That tool is Positive Intelligence®.

Positive Intelligence (PQ) is a psychology and neuroscience-based framework developed by Stanford lecturer Shirzad Charmaine. It's based on research with over 500,000 people in 50 countries, ranging from college students, to elite athletes, to corporate executives. PQ introduces the

concept of Mental Fitness by referring to our thoughts, habits and behavior patterns as *mental muscles*.

All of our mental activity is based on neural pathways. A neural pathway is a series of neurons (the specialty cell that makes up our brain and nervous system) that have connected together to form a chain. The more that pathway is used, the stronger it gets, building that mental muscle.

Negativity-oriented mental muscles are referred to as *Saboteur* muscles. These motivate us using stress, disappointment, self-doubt, regret, anger, shame, guilt or worry. Alternatively, positivity-oriented muscles are called *Sage* muscles.

The Sage handles challenges through positive emotions like empathy, gratitude, curiosity, creativity, self-confidence and calm, clear-headed, laser-focused action.

RECOGNIZING OUR SABOTEURS EMPOWERS US TO MAKE DIFFERENT CHOICES IN PLACE OF BEHAVIORS SO DEEPLY INGRAINED WE MAY NOT EVEN RECOGNIZE THEM AS POINTS OF CHOICE.



Through factor analysis, PQ has identified 10 Saboteurs and five Sage powers. Using that knowledge we can customize the understanding of our stress in any situation by:

1. Identifying which Saboteur(s) are activating, then,
2. Choosing the best Sage power to counteract them.

Ten Saboteurs

Just based on these high-level descriptions you'll likely identify some of these Saboteurs as your personal stress makers:

- 1. The Judge:** The universal Saboteur that causes much of our disappointment, anger, regret, guilt, shame and anxiety. Everyone has a Judge which, in addition to triggering one or more of the *Accomplice Saboteurs* below, judges:
 - Ourselves ("I'm so stupid" or "I'm not worthy")
 - Others ("They're so stupid" or "My life would be better if *they* would change")
 - Circumstances ("I'd be happy if I had that promotion/more money/a vacation")
- 2. The Avoider:** Focusing on the positive and pleasant in an extreme way. Avoiding difficult and unpleasant tasks and conflicts.
- 3. The Controller:** Anxiety-based need to take charge and control situations and people's actions to one's own will. High anxiety and impatience when that is not possible.
- 4. The Hyper-achiever:** Dependent on constant performance and achievement for self-respect and self-validation. Highly focused on external success, leading to unsustainable workaholic tendencies and loss of touch with deeper emotional and relationship needs.
- 5. The Hyper-rational:** Intense and exclusive focus on the rational processing of everything, including relationships. Can be perceived as cold, distant, and intellectually arrogant.
- 6. The Hyper-vigilant:** Continuous intense anxiety about all the dangers and what could go wrong. Vigilance that can never rest.
- 7. The Pleaser:** Indirectly tries to gain acceptance and affection by helping, pleasing, rescuing or flattering others. Loses sight of own needs and becomes resentful as a result.
- 8. The Restless:** Restless, constantly in search of greater excitement in the next activity or constant busyness. Rarely at peace or content with the current activity.

9. The Stickler: Perfectionism and a need for order and organization taken too far.

10. The Victim: Emotional and temperamental as a way to gain attention and affection. An extreme focus on internal feelings, particularly painful ones. Martyr streak.

Saboteur responses tend to be reactive, and non-rational. They're often coping or protection responses that we developed at some point in our life. Initially they served a purpose, however over time they've stagnated, becoming maladaptive behaviors that no longer serve us effectively.

The tools to counteract the Saboteurs are our Sage powers. Sage powers come more from the intentional, proactive parts of our brains that are focused on connection and relationship, as opposed to isolation and self-protection.

Five Sage powers

- 1. Empathy** for ourselves and others.
- 2. Curiosity** to learn more about people and circumstances.
- 3. Passion and purpose** and living our core values.
- 4. Creativity** and being open to trying new approaches and ideas.
- 5. Laser-focused action** that serve our Sage goals and mindset.

The power of PQ comes from combining knowledge of the two to create your custom stress-busting plan. Figure out which Saboteur is loudest, and then which Sage power would best counter it. For example:

- If you're berating yourself for missing a deadline (Judge, Stickler), try some empathy: "It's okay that I missed one deadline. No one in the world is perfect."
- If someone is doing something a different way than you and it makes you crazy, even if the outcome is the same (Controller), try some curiosity: "What's interesting about how they're doing it? What's at least 10% right about their approach?"
- If you're exhausted and burned out, but still taking on more projects (Hyper-Achiever or Pleaser), connect to curiosity, passion and purpose: "Why am I saying yes to things? Is it out of fear of disappointing myself or others, or because the project is something I really enjoy doing? If I say 'yes' to this project, what else am I saying 'no' to?"

To lower stress and be happier, we have to let go of our old stress responses and create new, more positive and productive habits. Recognizing our Saboteurs empowers us to make different choices in place of behaviors so deeply ingrained we may not even recognize them as points of choice.

To learn more about PQ and building your personal stress-busting approach, the book *Positive Intelligence: Why Only 20% of Teams and Individuals Achieve Their True Potential AND HOW YOU CAN ACHIEVE YOURS*, by Shirzad Charmin, is a very approachable and engaging resource. Take the free PQ Saboteur assessment (www.positiveintelligence.com/assessments) to learn what your top Saboteurs are.

I wish you knowledge, grace and wisdom on your journey to a lower-stress, happier, and more resilient approach to life! ■

*Note: * "Positive Intelligence" is a registered trademark of Shirzad Charmin and Positive Intelligence, Inc.*



Jacy Imilkowski, PMP, ACC, CLL, is a Mental Fitness coach and speaker specialized in Positive Intelligence for resilience and beating burnout. She also serves as the Speakers Academy Dean for the National Speakers Association-Wisconsin (a WSAE group member). Visit her website for more information: jacyimilkowski.com/pq



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As the Pandemic Ends – The Need to Reinvent Grows

by Sherry Budziak

I found a relic of my former life when I was organizing my files. It was a presentation I created back in January 2020. The title was *Association 4.0 – Creating Community in a Less Social World*. I planned to use the deck to launch a new series of in-person Think Tanks. The topic was going to expand on an earlier discussion about how *Industry 4.0*, or the digital revolution, would impact associations.

You know what happened next. Shortly, after I scheduled the meeting, I had to cancel. Everyone had more pressing issues to worry about. In hindsight, I'm amazed at how accurately the title reflects the challenge we were, and are, facing. Today, both everything and nothing has changed.

The landscape is now vastly different. One year ago, most leaders weren't overly concerned with technology. Upgrading systems seemed like an expensive and complex process that didn't directly address the most pressing challenges. Now we've experienced why it's important to invest in the best systems you can afford.

If you doubt the wisdom of this advice, consider what remains the same.

The pandemic may have changed our habits and slowed the economy, but it did nothing to stop the progress of the *Fourth Industrial Revolution*. In fact, the virus threw gasoline on a fire, accelerating a situation that was already precarious. Associations that weren't prepared for digital commerce experienced a painful struggle to keep pace.

My presentation reminded me that although we can see the other side of the pandemic, we are still in the middle of Industry 4.0. It is critical for associations to continue evaluating our culture, systems and operations every day with fresh eyes.

Understand Industry 4.0

I never imagined that I would be a technology nerd, and I'm not in the traditional sense. The relationship between ones and zeros isn't what interests me. What grabs my attention is the power those configurations give us to live and work more productively. For several years, Industry 4.0 has been in my sights as a phenomenon that associations must reckon with.

The Fourth Industrial Revolution is characterized by the fusion of biology, technology and the material world. It can seem more like science fiction than something that is happening in our current reality. The quick delivery of a vaccine to fight COVID-19 is just one example of many technological marvels. With each development, the window between fantasy inventions and real products and services grows smaller. These are examples of the kind of miracles that are becoming commonplace.

- Researchers are developing brain-machine interfaces that aim to restore mobility to people who have suffered a stroke or some other traumatic injury. Other areas of exploration are to restore sight, hearing and even memory.
- Robots are increasingly human-like both in appearance and ability.
- 3D printers are now capable of operating in harsh and remote environments. Machinery or tools that break down in locations such as mines or on oil rigs can be replaced quickly.

It's challenging to imagine how these breakthroughs could impact the daily business of running an association. But that's the thing about Industry 4.0. What happens at the macro level very quickly trickles down.



Study the market

Awareness of what is making waves across the digital marketplace is key to staying afloat. Every leader should be familiar with the trends that are shaping this upheaval of the economic, cultural and social order. Blockchain, 3D printers and virtual reality may not be in your immediate future, but association executives should understand how this technology is impacting other areas of the economy.

For a forecast that is closer to home, review these assumptions about the association industry that my business partner, Kevin Ordonez, and I outlined in our book *Association 4.0: Positioning for Success in an Era of Disruption*.

- Consumers will be impatient and exacting. They will want customized products and services delivered on demand.
Imagine: Customizable continuing education modules that employ artificial intelligence to answer a user's questions.
- A constant stream of customer data will be available to continually upgrade products and services.
Imagine: Newsletters that are produced on demand and curated based on each reader's areas of interest.
- Businesses will discover new structures for partnership and collaboration designed to deliver greater benefits to participants and to accelerate ongoing innovation in all their activities.
Imagine: Contracts that include agreements and royalties related to ideas rather than products and services.
- Organizations that, today, seem unaligned will become indispensable to each other.
Imagine: The American Heart Association and The International Society for Stem Cell Research collaborating to facilitate the development of new heart valves made from stem cells.
- Employees will be part of a global marketplace giving them greater opportunity to specialize, to pick and choose assignments, and to select non-traditional hours and workplaces.
Imagine: Associations that have no permanent headquarters and few full-time employees.
- Organizations will be more collaborative and project-driven and less hierarchical.
Imagine: Employees being organized and led based on standalone projects rather than ongoing functions.

We developed this list almost four years ago, and it's interesting to see how many of the concepts are already fully realized. I am struck by the convergence of opposites that technology creates—customized and individual versus global, location neutrality versus professional specialization,

and commonality among organizations that would seem to be unlikely partners.

In addition to causing opposites to attract, Industry 4.0 merges activities that were once considered distinct. Both of these characteristics are evident in my own business journey.

Step up to Association 4.0

.orgSource began with the focus on technology. But as digital processes have become integral to every area of operations, our activities have naturally expanded to include strategy and marketing. We do our best work for our clients when we can take a holistic approach. This broad perspective is the key to stepping up to Association 4.0 rather than becoming a casualty of Industry 4.0.

Opportunity for associations today lies in developing an overarching digital strategy. Most organizations invest in technology, but without a strategy, systems like an AMS or an LMS are just a collection of tools waiting to be harnessed for true digital business.

The ability to put all the moving parts together and help associations make the leap from vision to action in a volatile business environment is extremely rewarding. .orgSource is never done growing, and neither are our customers.

As we find our way out of the pandemic, I hope leaders will not view this as a time to return or retreat. It should be the opposite. We need to embrace what we have learned and accept that there will be no end to the need for innovation. The exploration of what your organization can be or become must be fluid.

I am often asked to find solutions for:

- Boosting participation at events
- Engaging younger members
- Managing change
- Moving strategy to execution

These questions are important, but they are distractions from the bigger picture. Industry 4.0 demands that you continually evaluate why your organization exists, where it should go in the future, and what you must do to arrive there.

With all of the choices and competition for your members' attention, ask yourself why they should engage with you. Then, accept that the answer to that question will never stop changing. The pandemic may end, but Industry 4.0 demands that the need to reinvent will continue and grow. ■



Sherry Budziak is the founder and CEO of .orgSource (orgsource.com), a WSAE partner. Sherry is a WSAE member, as well as a Spring Forward presenter.

Congratulations to Wisconsin's Newest CAEs!

The Winter 2021 class of CAEs successfully completed the CAE examination administered nationwide December 1-14, 2020. They will be honored, along with the Summer class of CAEs, during the 2021 ASAE Annual Meeting & Exposition in August. Two of the three new Wisconsin CAEs are WSAE members:

- Brenda J. Barnhardt, CAE, REALTOR® Association of Northwestern Wisconsin
- Jodi Fisher, CAE*, Impact Association Management
- Rosanne Stelpflug, CAE*, Executive Director, Inc.

We caught up with WSAE members Jodi Fisher and Rosanne Stelpflug about their motivations for pursuing the CAE, as well as any advice they have for others interested in doing so.

** WSAE members*



Jodi Fisher, CAE

Founder and CEO
Impact Association Management

What does achieving your CAE mean to you?

As an industry professional and business owner I want to lead from a place of not only experience but also learned knowledge. The CAE represents the desire to learn, and keep learning, best practices in the association industry – for myself, but also to develop my staff at the highest level possible. All of this will be used to better manage our association clients.

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

I couldn't have done it without the ASAE CAE study series – all of the books, practice exams and study guide (it's a lot but they were crucial), as well as the support of other CAEs when I would reach out to them with my questions! Depending how you learn, I would also recommend a study group. I prefer to learn on my own, although I have heard from many others that it was a significant factor for them in successfully passing the exam. ■



Rosanne Stelpflug, CAE

Director of Administration
Executive Director, Inc.

Why did you decide to pursue your CAE?

I am dedicated to the association management field and saw the credential as a key professional development opportunity that could help me grow further in my career.

What does achieving your CAE mean to you?

It means a lot to me to be connected to the larger community of CAEs working toward a common goal. I feel proud to have accomplished this goal and am already applying knowledge learned throughout the process.

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

I highly recommend taking advantage of the Michigan Society of Association Executives (MSAE) Prep Courses for the CAE exam and connecting with other recent CAEs to learn about their experiences. Both of these resources truly helped me prepare for the exam. ■



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The Connecticut Society of Health-System Pharmacists names Impact Association Management as AMC

Impact Association Management announced a new partnership with the Connecticut Society of Health-System Pharmacists (CSHP). This partnership will assist CSHP in its mission to advocate and support the practice of health-system pharmacy professionals to help people achieve optimal health outcomes.

CSHP has represented the professional interests and provided professional development for Connecticut pharmacists, educators and pharmacists in training since 1948. Their new partnership with Impact has the potential to enhance their use of technology to improve operational efficiency and reduce costs.

Mary Dean, JD, CAE, named Executive Director of the Society for Immunotherapy of Cancer



Executive Director, Inc. and The Society for Immunotherapy of Cancer are pleased to announce that **Mary Dean, JD, CAE**, has been named Executive Director of the society.

Ms. Dean steps into her new role after serving as the Associate Executive Director of SITC since February 2018, helping steward the strategic vision of the society as set forth by its members. She has more than 16 years of association experience. She spent the majority of those years serving as the Executive Director for the American Society of Gene & Cell Therapy, in addition to the Executive Director for the Society of Behavioral Medicine, American Venous Forum, and Growing Spine Foundation.

Ms. Dean assumes the lead staff role of the society from long-time SITC leader, Tara Withington, CAE, who served as its Executive Director since 2001. Mrs. Withington will continue to support the society's efforts as Executive Director Emeritus/Consulting Partner.

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.



AMPED Association Management: Expansion, personnel updates



AMPED Association Management (AMPED), an accredited full-service association management company with offices in Madison, Wisconsin and Washington, DC, has been selected to manage the Woodworking Machinery Industry Association (WMIA). **Donté Shannon, FASAE, CAE**, will take on a new role as President and CEO.



AMPED has also been selected to manage the Tavern League of Wisconsin (TLW). **Michelle Czosek, CAE**, will serve as Executive Director of the TLW, overseeing all operations of the organization and working directly with the Board of Directors on strategy and budget. Michelle has more than 30 years of experience managing

a variety of professional and trade associations with expertise in education, event planning, membership and governance.



Tony Veroeven will serve as the Vice President of External Relations, focusing on partnerships and membership growth. Tony's expertise in marketing, sales, and member relations will help guide the growth of the TLW and their Foundation.

"AMPED is very excited to be working with the TLW," said Czosek. "We look forward to communicating the value of the TLW and working in partnership with the volunteer leaders so that they can focus on advancing the TLW and its mission with confidence, knowing that management and operations are in experienced hands."



AMPED is pleased to announce that Account Executive **Michael Battaglia, CAE**, has earned the credential, CNAP. Battaglia recently completed the Certified Nonprofit Accounting Professional (CNAP) program, designed to recognize excellence in the not-for-profit industry through comprehensive qualification, training, and examination. During the three-day program facilitated by Wegner CPAs, Battaglia received intensive training from individuals dedicated to serving non-profit organizations.

Megan Hille, CAE, CMP, receives Outstanding Service Award



Megan M. Hille, CAE, CMP received an Outstanding Service Award presented by Gloria Galloway, MD, MBA, FACNS during the business meeting of the American Clinical Neurophysiology Society (ACNS) on Sunday, February 14, 2021.

Ms. Hille has served ACNS as their executive director since 2012.

During that time, membership has increased 40% and annual meeting attendance has almost tripled. “I was surprised and honored to receive this award and look forward to serving ACNS in the future,” Hille said.

ACNS is managed by Executive Director, Inc. (EDI), an association management company specializing in medical organizations.

Kristine Hillmer, MBA, CAE, featured in *InBusiness* magazine



Kristine Hillmer, MBA, CAE, President and CEO of the Wisconsin Restaurant Association, was interviewed for an article in the March 2021 issue of *InBusiness* magazine about the toll COVID and mitigation measures have had on our state's restaurant industry. Read it here: <https://bit.ly/3nn0vVb>

Blue Sky eLearn wins award for excellence, and more

Blue Sky eLearn recently won a coveted Brandon Hall Group silver award for excellence in the *Best Advance in Learning Management Technology for External Training* category. In 2020, Blue Sky eLearn held over 4,000 virtual events or recordings for clients. They also added 125 new clients and doubled their staff size! G2Crowd named Blue Sky eLearn a *High Performer* in each of their quarterly reports.

Green Bay's Resch Expo is Open for Business

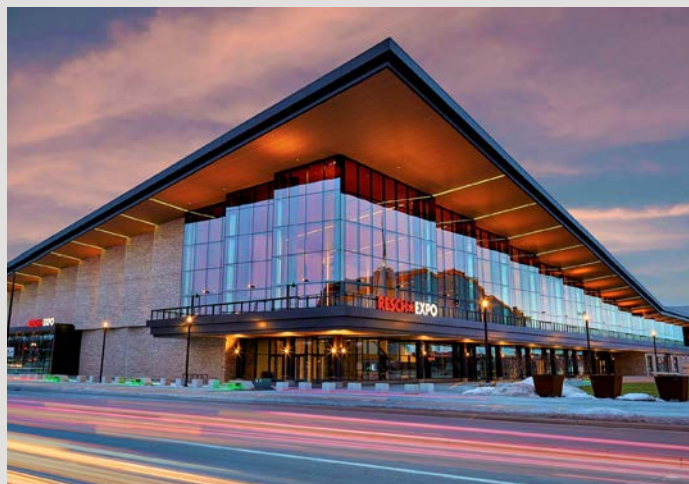
The \$93 million Resch Expo is open for business. Resch Expo's innovative multi-purpose design boasts 125,000 square feet of floor space, with another 135,000 square feet of pre-function, meeting, networking and outdoor plaza space. The facility replaces an aging arena and flat show building previously on the same footprint.

The abundance of glass windows creates a sense of transparency and access, blurring the lines between indoor and outdoor and welcoming the distinctive Wisconsin landscape in. A sweeping roofline creates three individual elevations, forming a grand entrance at the front of the building.

Situated next to historic Lambeau Field the facility is perfectly placed in a walkable entertainment district. Resch Expo offers a free flow design from its first-floor pre-function space directly into the lobby of the 10,000 seat Resch Center. Resch Center offers the region's premier concert/large conference stage set up. Additionally, it hosts sports tournaments like basketball, volleyball and hockey. Having the ability to combine the two venues is a huge advantage for large events looking for a Midwestern venue.

There are several event spaces on the building's outdoor plaza, with amazing views of historic Lambeau Field. Indoor/outdoor networking events and receptions have all been thoughtfully planned for the space. Planners interested in offering something a little different could have an early morning yoga session on the turf, or food trucks adjacent to the beer garden. The spaces are well lit and can be tented.

Planners interested in guided tours of Resch Expo can contact Beth Ulatowski, director of sales at the Greater Green Bay Convention & Visitors Bureau, 920-770-1478 or beth@greenbay.com.



WELCOME NEW MEMBERS

As of March 31, 2021

Kris Ackley, AMPED Association Management
Judy Baeten, Executive Director, Inc
Ingrid Beamsley, Impact Association Management
Brooke Boring, Executive Director, Inc
Julie Cabaniss, Executive Director, Inc
Kortnee Carroll, Great Wolf Lodge
Miranda Caulkins, AIA Wisconsin
Audrey Chang, ASA - CSSA - SSSA
Joan Dadian, Executive Director, Inc
Barbara DeMeulenaere, The Ingleside Hotel
Megan Denhardt, CAE, DES, The Denhardt Group
Dana Doyle, Executive Director, Inc
Lacey Edwardson, ASA - CSSA - SSSA
Juan Encarnacion, Great Wolf Lodge
Chris Flores, ASA - CSSA - SSSA
Anne Hauer, The Welch Group
Anahis Injasoulian, Executive Director, Inc
Laura Kocum, The Welch Group
Jennifer Kowalski, Executive Director, Inc
Hannah Lipton, Executive Director, Inc
Sara Mattson, Executive Director, Inc
Peggy Meskan, Madison Area Builders Association
Ann Marie Moss, Executive Director, Inc
Olivia Mueting, AMPED Association Management
Joshua Murphy, Executive Director, Inc
Laurie Rappa, Executive Director, Inc
Charles Reingardt, Student
Hannah Rice, Executive Director, Inc
Katrina Schwarz, National Fluid Power Association
Michelle Sieg, Executive Director, Inc
Lisa Stanek, Executive Director, Inc
Samantha Stohlman, The Welch Group
Amy Swenson, Executive Director, Inc
Genna Tangney, Great Wolf Lodge
Susan Thomson, ActionCOACH Business & Executive
Coaching of Wisconsin
Adam VanOuwerkerk, Wisconsin Hotel & Lodging Association
Jeanne Welch, The Welch Group
Peter Welch, The Welch Group
Allison Winkler, Executive Director, Inc
Natalie Worchester, Executive Director, Inc

THANK YOU RENEWING MEMBERS

Continued from Winter issue, renewals below from January 31-March 31, 2021

Paul Bristow, Hyatt Regency Milwaukee
Dale Beaty, Edge Dairy Farmer Cooperative
Terry Davidson, International Foundation of Employee
Benefit Plans
Jeanne Deimund, Wisconsin Association of School
Business Officials
Michael Doers, Town Bank
Dana Ecker, The Hotel Retlaw
Marc Herstand, National Association of Social Workers,
WI Chapter
Darcie Holte, Destination Lake Winnebago Region
Melanie Klongland, Glacier Canyon Lodge
at The Wilderness
Jim Lynch, Association of Wisconsin School
Administrators
Jennie Macaluso-Ruditys, CAE, Wisconsin Association
Management LLC
Matt McLean, Marshfield Convention & Visitors Bureau
Michelle Morrison, CAE, American Society of Laser
Medicine & Surgery
Kaitlyn Peters, Wisconsin Association of School
Business Officials
Brandon Scholz, Wisconsin Grocers Association
Patrick Snyder, IOM, BizStarts
Becky Wimmer, Premier Choice Association
Management, LLC



Join Us, With Safety in Mind, at 2021 Spring Fore-ward

by Michelle Czosek, CAE



The mission of the Wisconsin Society of Association Executives (WSAE) is creating meaningful connections and enhancing competencies of association professionals. Although we can, and have, done both throughout the pandemic, I think the best learning and networking takes

place in person, which is why I'm thrilled to be writing this column with an in-person meeting, the 2021 Spring Fore-ward, on the horizon.

I've never been more excited to open registration for an event in my career – an in-person event where I can spend time catching up with people, watching a presenter without a screen in front of me and playing golf. WSAE has opened registration for our first in-person event of any size since Summit 2019. Our 2021 Spring Fore-ward will take place on June 7-8 at the Grand Geneva Resort and Spa in Lake Geneva!

I want to assure our members that attendee safety is of the utmost importance. The decision to proceed in this direction was not taken lightly and we all understand that this meeting will look different from previous events. More information on that is provided later in this column.

For our education on the first day, we'll be welcoming Karl Alrichs, CSP, presenting *Tough Decisions in a .org World - Association Ethics in 2021* (hint: get your CAE ethics credit!), and Jim Lindell, CSP, Thorsten Consulting Group, Inc., presenting *Next Steps – Recruiting, Retaining and Engaging Members*. We'll follow that with time to network at our Participants and Pairings Party. On day two, participants can choose to golf or attend education sessions. Those sessions will be with Debbie Vyskocik, providing insights into *Increase your Performance Through Self-Compassion*, and

WSAE members Sherry Budziak and Jennie Socha, CAE, leading the session *The World Is Changing – How do 2021 trends impact us and how do we keep up?*

Working with our host hotel, The Grand Geneva Resort and Spa, we are planning for a socially-distanced meeting, and made the decision that the entire meeting, except for the golf tournament, will be deemed *mask mandatory*. This masking includes our time in the meeting room and at networking activities when not actively eating or drinking. You will also be asked to indicate that you understand all our meeting guidelines in the form of a Code of Conduct statement when you go through the registration process.

For many of us, a major part of career satisfaction comes from the relationships built – the people you work with, members you're fortunate enough to serve, peers in other associations, industry suppliers and the list goes on. Zoom, Teams and other virtual platforms have allowed us to continue to meet, learn and network when we could not be together in a room.

Those platforms have allowed people who were not able to travel to a convention or meeting to attend from wherever they are located and take advantage of opportunities they would not otherwise have had. Virtual education and networking components are likely here to stay and will be a positive addition to events moving forward.

Although we will have to maintain our distance and look for a *smize* (smile with our eyes) instead of the smiles and hugs we are all used to, I look forward to seeing everyone in Lake Geneva. Meeting in person and sharing challenges, leaning on each and celebrating successes is what fuels and refreshes people. I hope you'll join us for some refreshment and fun. It's been a long time! ■

Michelle

FOR MANY OF US, A MAJOR PART OF CAREER SATISFACTION COMES FROM THE RELATIONSHIPS BUILT – THE PEOPLE YOU WORK WITH, MEMBERS YOU'RE FORTUNATE ENOUGH TO SERVE, PEERS IN OTHER ASSOCIATIONS, INDUSTRY SUPPLIERS AND THE LIST GOES ON.



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- » **Plated or Buffet Menu Options**
- » **Private Space**
- » **Full Bar Service**
- » **Wireless Internet/ AV Equipment**
- » **Sporting Clay/ Archery Courses**