VANTAGEPOINT

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About VantagePoint

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What's the Plan?

by Kristina Mattson-Grimm, CAE

Many of us have been asked the question, "Where do you want to be in two, three or five years?" Pick a number. Whether it was during a job interview, in professional development discussions with your supervisor or in a Board meeting, it probably sounds familiar.

As association professionals, our members entrust the staff and board to be guided by and support its mission. How does your association determine what will be its focus? How will it get from where it is currently to where it wants to be? This is your compass. This is your strategic plan.

This compass drives the process. Your strategic direction is determined by activities, steps and resources required to execute and achieve three to five main goals. It provides a clear focus for where you are headed, what you are doing and what you are not going to do based on the needs of your members. This can be a hard pill to swallow, realizing we can't be all things to all people. With that said, it's ok to experience some twists and turns along the way.

WSAE goes through a similar process and is currently implementing its strategic plan created last year. In March we did a deep dive, putting specific and measurable goals around these themes:

1) Grow membership year over year.
2) Provide CAE-quality educational events.
3) Understand the role of the CEO in developing teams and him/herself.
4) Develop and nurture relationships among our peers.

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WSAE Calendar of Events

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

SUMMERTime to Shine
July 25
Hilton Garden Inn, Sun Prairie

Milwaukee CEO Roundtable
July 25
Moe's Irish Pub, Wauwatosa

Madison CEO Roundtable
August 8
The Edgewater, Madison

Wisconsin Reception at ASAE
August 12
Park Street Tavern, Columbus, OH

Milwaukee CEO Roundtable
September 26
Moe's Irish Pub, Wauwatosa

2019 Summit
October 28-29
Potawatomi Hotel and Casino, Milwaukee

Webinar SERIES

Event Contract Negotiations
July 23

Who Is Afraid of the Big Bad Camera?
August 7

Talk Triggers: Turn Your Members into Volunteer Marketers
August 28

Pivot Point: Reshaping Your Organization When It Matters Most
September 10

Check out the webinar archives for on-demand viewing www.wsae.org.

Preparing for the Journey

by Diane Welhouse, CKBR

Whether you are bringing your board together for full strategic planning or updating and reviewing your current plan, start the process off right by preparing the participants for the journey. When asked to participate in strategic planning most people give the eye roll, deep sigh and envision themselves going into a meeting room for countless hours. They see the meeting as an unnecessary task, even though it is one of the board's primary responsibilities to set and continuously refine direction for the organization. For volunteer boards, it's another long meeting and more of their time. Most board members will arrive engrossed in their phones, addressing emails and trying to put out as many fires as they can before the meeting begins.

Smaller associations, those looking for budgetary savings, or organizations that have someone with strong facilitation skills, often have their board and executive director work the process together rather than outsourcing facilitation. It is the facilitator's role to ensure a productive meeting. The facilitator must quickly establish cooperation and cohesion from a group of people coming from different disciplines. Although you and your board seemingly know each other, spending the first part of your meeting reestablishing safety and trust among the participants reengages synergy. It gets the group to focus on the task and ultimately working on the vision faster than jumping immediately to *where do we see the organization in the next three years?* Synergy of the group is established though shared purposes, safety and trust.

Start the group's shared purpose by drafting a detailed agenda for the meeting. Include start and end times for each item, along with any supporting notes like description of the agenda item or specific reference materials for the discussion. This will immediately calm the critical thinkers in the group. Write brief, specific statements in the agenda to tell the group the three P's – purpose, process and payoff. What is the *purpose* of the meeting – why are we here? Share the *process* by which the meeting will unfold so participants know what to expect. Finally, what will be the *payoff* of the meeting – the result, so they can see their accomplishments. For example, the purpose or reason for the meeting might be to *develop goals and strategies that will guide current and future leaders of the association to achieve their mission and vision*. After calling the meeting to order and welcoming the group, review the purpose, process and payoff, setting the stage with a shared purpose.

Safety

With an established shared purpose, the group now knows why they are at the meeting and what they are going to do. However, the group is still at an individual stage and not ready to fully engage. It's time to guide the group from *I* to *We* through reestablishing safety with each other. For a group member to contribute and participate, he or she must feel safe as an individual within the group. People want to know their opinion

IT IS KNOWN FACT THAT CERTAIN CONDITIONS ARE FOUND IN HIGH-PERFORMING GROUPS, MEANING COMMON ELEMENTS ARE FOUND IN GROUPS THAT ARE EFFECTIVE AT ACCOMPLISHING THEIR TASKS, GOALS AND OBJECTIVES. GROUP EFFECTIVENESS IS CONDITIONAL ON THE ABILITY OF THE GROUP TO WORK TOGETHER, BE COOPERATIVE AND FEEL CONNECTED OR COHESIVE WITH THE OTHER MEMBERS.

matters, their ideas will be heard and they are valued, making the meeting worth their time. This begins with a basic understanding of *who am I* and *who are you* and can be accomplished in three quick and easy exercises.

Introductions with a twist. Going around the room, each participant introduces themselves, breaking the ice and getting people talking. Have the introduction include their name, company they work for, title and how long they have been in their role or at the company. For the twist, ask them to share openly how they feel about being at the meeting. To some this will seem redundant and odd to introduce themselves and share feelings, but the benefits will outweigh any naysaying. The introduction gives the group members their first chance to *check-in*, share and move from being an individual at the meeting to becoming a member of the group. Encourage the members to speak freely about their feelings about being at the meeting. Comments like "I didn't sleep well last night, I am tired and worried about a project deadline" are perfect. It allows the member to release tension, creates an understanding for others why that person is or may behave a certain way and allows the facilitator to gauge the climate of the group and adjust the approach accordingly.

Get to know you. Something as simple as *share one of your interests or hobbies*, or if it is around a holiday, *share your plans or family traditions*. This moves the individual another level deeper in the group by getting to know each other. The group mood or climate will begin to change as participants further connect with each other.

Ground rules. As the group starts talking freely and feeling comfortable, solidify safety by establishing ground rules or rules of engagement for the rest of the meeting. Ground rules are the most important component of building and continuing a successful dynamic. They further the shared expectations, safety and culture of the group. Without explicit ground rules agreed to by the group, time is wasted, people are not fully engaged, and trust is more difficult to establish and maintain. Ultimately, ground rules help to increase the engagement and participation of the group while creating greater cohesion and shared identity.

Have the group share ideas and create a combined list of rules that will encourage each participant to fully engage, feel safe sharing, feel like they belong and are a valued member of the group. Determine acceptable and unacceptable behavior and how we will treat each other during the meeting. Areas to consider are confidentiality, use of technology, respect, participation, listening, honesty and understanding. Create the list with a positive tone. For example, *Listen when others speak* verses *Don't interrupt* or *Challenge ideas, not people*. Most groups establish five to ten rules – a list that is manageable and memorable. If a lot of ideas are generated, work with the group to combine ideas. Many times, two or more ideas will have the same intent. The intent is the priority. Once the list is established, the group must accept these as their rules. Each person must understand they exist for the entire group and any member can remind any other member of the rules at any time. The rules can be modified by the group at any time as needed, as well.

Trust

With the ground rules or rules of engagement agreed upon, the foundation for trust is set. It is time to start digging deeper, allowing participants to test the waters of trust and start sharing thoughts and feeling relevant to the meeting. This is also known as inclusion – member participation, involvement and engagement. If any member of the group doesn't trust another member this will limit their participation and ultimately their feelings of inclusion leading to the meeting being a waste of their time. This exercise is called *Hopes and concerns*. This can be approached in a variety of different ways. The focus can be related to the work of the group or the meeting that day. What is each person looking forward to (hope) in the meeting and what might they not be looking forward to as much (concern)? Or if this is a start of a new planning cycle perhaps the discussion is on hope or excitement about the organization's future as well as concerns or fears of the future. Give the group a few minutes to write down some thoughts regarding their hopes and concerns of the question posed. Then go around the room sharing answers of hopes, followed by concerns, capturing the comments for further discussion. The exercise allows participants to forge a deeper understanding and appreciation of each other by hearing and seeing each other's common thoughts and differences. The feeling of inclusion through participation, involvement and engagement starts to develop further. Trust is deepened, as long as the ground rules are followed in the discussion, or if violated, immediately addressed. The information is also valuable to the rest of the planning. The group can discuss common themes and what can be addressed in the new strategic plan, or perhaps adjusted in the existing plan, to realize current hopes and prevent concerns from developing.

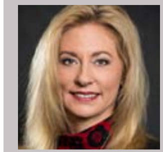
Synergy

Through the building of safety and trust, the group has discovered *who am I* and *who are you*, and is in the process of realizing *who are we*. Who are we is the foundation of synergy. The group has a shared purpose, a sense of safety and trust and is ready to work together (cooperation and cohesion) to realize the stated payoff at the end of the meeting. Synergy can be deepened by identifying any specific roles and responsibilities of the group and understanding how decisions will be made.

In terms of roles, reiterate that everyone, regardless of additional responsibility, is expected to be a participant. Does the group need a note-taker – possibly relieving the board secretary from this role – to ensure everything is captured? Is a timekeeper needed to help the facilitator keep the meeting on schedule? Is your group prone to *groupthink* and is a devil's advocate needed to challenge ideas and ensure new views are considered?

Most discussions will end with a decision. Many groups will keep their decision-making implicit and assumed. Sometimes this relates to power and authority in the group or perceived power by the more expressive members. Coming to an agreement about how the group will make decisions creates further security and sense of inclusion – *I will be heard and valued.* A consensus decision-making model is typically best to maintain safety, trust and, ultimately, synergy of the group.

It is known fact that certain conditions are found in high-performing groups, meaning common elements are found in groups that are effective at accomplishing their tasks, goals and objectives. Group effectiveness is conditional on the ability of the group to work together, be cooperative and feel connected or cohesive with the other members. If the group lacks safety and trust, it will never have the synergy to be cooperative and cohesive. When safety and trust are not attended to, group members may shut down and not participate, or even worse, undermine and sabotage process and decisions. The team-building exercises outlined here will quickly and easily build the foundation for cooperation and cohesion. This synergy will get the group to focus on the task and ultimately work toward the vision, making strategy meetings significantly more productive. ■



Diane Welhouse, CKBR, is Executive Director at the National Association of the Remodeling Industry (NARI), and is a WSAE member.

False Starts at Strategic Planning

by Bob Harris, CAE

Boards can be resistant to strategic planning. Some find it easier to focus on short-term thinking and safe topics. Others fear the group hugs and games that characterize some retreats. A few boards consider planning an expensive process. Even the boards that have budgeted for planning often delay it a year or more.

Reports say that up to 50 percent of strategic plans fail. Here are 13 (unlucky) false starts and failures in the process.

1. **Annual planning**. A strategic plan should span three to five years. If planning occurs every year, it becomes a short-term plan associated with the current chief elected officer. When directors know the organization plans annually, they seldom think beyond the year – *We don't need to think long-term because we will be doing this again in 12 months*. The plan should be considered rolling for a period of at least three years in order to guide the board, and it should be reviewed for progress annually.
2. **Too many planners**. The IRS suggests that the size of an exempt board of directors should facilitate meaningful conversations. Too few people may limit ideas. Too many may draw out meetings with everyone

Champion of the Strategic Plan

by Bob Harris, CAE

The board wrapped up its retreat, drafted a strategic plan and intended to officially adopt it at the next meeting. That's often where plans die. Upon adjournment of the retreat, busy schedules take over. The plan is shelved or filed. The saying *out of sight, out of mind* applies.

There are many reasons a plan might fail, including transition of officers, an unwieldy plan, a board unaware of its importance or an officer more interested in building a legacy.

To deploy the plan and integrate it into the organization, a plan champion or task force may be appointed. The role is to ensure the strategic plan takes hold.

Identify the plan champion

Just as a board relies on a treasurer to monitor and report on the finances, a plan champion or task force reports on the strategic plan's progress. The intent is to keep the plan foremost in the minds of directors, committees and staff.

- **Strategic plan champion**. A member of the board who is close to the chief elected officer, often the person most likely to next ascend to the position, accepts the role of plan champion for the year. He or she monitors and reports on progress, making sure that the plan is not lost or waylaid in favor of personal agendas or distractions. When progress is slowed, the champion will question why.
- **Task force on strategic plan implementation**. This is an appointed small group of board volunteers to maintain focus on

providing input. The dynamics are far different for a group of 15 people versus 30 or 40. The right size for a planning team is usually 15 to 20 strategic thinkers. If the desire is more input, conduct advance focus groups or surveys. Every four extra people at a planning meeting tends to add an hour to the schedule so that everyone can be involved and heard.

3. **Meeting environment**. From temperature to light source, the room environment is critical. Squeezing too many people into a dimly lit room will have a negative impact on outcomes. Avoid basements and other dark, narrow rooms. Be sure the room temperature can be controlled, and there is space for people to spread out and take breaks.
4. **Table arrangement**. An open-U arrangement allows everyone to sit at the same table, easily hearing and watching what is said. Observing body language is key in strategy development as directors might have good feedback but their micro-cues indicate otherwise. Place a flip chart or screen at the open end of the table. Consider a room with enough space to accommodate several rounds

BRAIN STORMING WITH LIMITED RESOURCES – FUNDS, VOLUNTEERS, COMMITTEES, TECHNOLOGY AND STAFF – IS UNPRODUCTIVE. STRATEGIC PLANNING CAN BE DESCRIBED AS THE *DISCIPLINED ALLOCATION OF RESOURCES.* BE SURE THE FACILITATOR AND PLANNING GROUP ARE FAMILIAR WITH AVAILABLE RESOURCES BEFORE SETTING GOALS.

implementation. They may develop innovative methods to keep the plan front and center. Staff may be added or consult with the task force. The task force serves until they are confident the plan has been integrated into the association.

Take action after the plan is adopted

- **Adoption**. Ensure the board understands and adopts the new multi-year plan by a motion at an upcoming board meeting.
- **Agendas**. Revise the board agenda to ensure the plan receives attention periodically at meetings and time is allotted for discussion of the goals.
- **Engagement**. Develop tools to maintain board interest in the plan. Suggest keeping the actual plan on the board table, displaying it on the conference room wall or creating wallet cards with a summary of the plan for volunteers to reference and distribute.
- **Awareness**. Transform the plan into promotional materials to inform members and the community. Create graphics and design a brochure or PDF for members and prospects, post on the website, and create a banner of the new mission, vision and goals.
- **KPIs**. Study and set key performance indicators (KPIs) for measurable elements of the plan. KPIs may include growth goals, deadlines for completing work and assignments to committees, staff and consultants. Transform the KPIs into a dashboard of eight to 12 major elements the board can monitor. For example, if the plan calls for membership growth of 200 new members within three years, the staff will break that down to be 66 new members per year or 12 per quarter.
- **Staff alignment**. Be sure staff understands they are part of the team to advance the plan, along with board and committees.
- **Tracking**. Staff may create a tracking tool to become their office work plan. It takes the format of a horizontal template or spreadsheet that includes columns for the goals, strategies, tactics, KPIs, assignments and deadlines. The most popular method to report the tracking is with a *stoplight* concept. Green indicates progress or ongoing; amber indicates there may be needs such as resources, funding, time, delays or questions. Red indicates the effort has come to a halt or delay.
- **Reporting**. Ask the chairman of the board to allocate time to report on progress or problems. The board should anticipate updates and celebrate achievements.
- **Annual review**. At least annually review the plan among board and staff. Also, the membership will appreciate knowing how the board has advanced the plan that was announced a year earlier. The plan will be the foundation for an Annual Report.

The plan acts as a safeguard against mission creep. "Good ideas" will arise at meetings that are accelerated by passion and group think (*I voted for it because I thought you were going to vote for it*).

The plan keeps the board on track. If a priority or crisis arises the plan may be delayed but the champion or task force will ensure attention returns to the plan. ■

in the back of the room for breaks, meals or small group work.

5. **Terminology**. Many of the participants may never have been involved in strategic planning, while others come from an environment that conducts planning but uses terms unique to their settings. Understanding and agreeing to the words associated with nonprofit planning is critical. Otherwise, directors provide input but don't know whether they are offering a *goal*, *strategy* or *tactic*. Keep a terminology card on the table that defines: *Mission, Vision, Values, Goals, Strategies, Performance Measures* and *Tactics*.
6. **Wrong season**. It would be unwise to conduct strategic planning in the middle of the current term of office when the chief elected officer's year is underway. An ideal time for planning is as the current term comes to a close. This allows incoming officers to create a plan and then have a month or more to consider implementation (assigning committees, adjusting budget, etc.) Or conduct planning immediately at the start of the new term. There should be linkage between planning and budgeting.
7. **The right people**. The wrong people can doom the process. It is a responsibility of the board of directors. If the board is large or none of the directors are strategists, pare down the number. Avoid an imbalance of past presidents or chairs – the meeting is about the future. Find ways to include visionaries, emerging leaders, representatives of diversity and those who embrace technology.
8. **Plan report**. The final plan should not be measured by the number of words or pages. Some of the best plans can be summarized on a business card. Be sure the report is drafted within a few days of the retreat and shared with participants so they can see the results of their volunteer time. Avoid adding fluff to the plan report, such as pages of background reports, the environmental scan (SWOT analysis), agendas or survey results. Let the plan stand on its own as a report about how the organization plans to advance its mission and goals. Remember that busy people seldom have time to read more than three pages before they are interrupted; shorter is better.
9. **The Facilitator**. The facilitator is charged with keeping discussions on track and completing the task at hand – development of a multi-year, visionary and compelling strategic plan. Be leery of the board that asks their executive director to facilitate. The executive should be a participant at the table, not the note taker. Be cautious about the elected leader who wants to facilitate or has someone from his or her company lead the meeting; it is likely to be a conflict of interest and may diminish honest dialogue. Identify a facilitator who fits your culture and understands your desired outcomes.
10. **Level of discussion**. One might characterize board discussions at the 50,000-foot level – visionary, strategic conversations that reach into the future. That would position committees at about 25,000 to 35,000 feet and staff at about 10,000 feet, defined by the IRS as *implementing the decisions of the board*. At strategic planning, conversations should beat the 50,000 foot level and above. It is not the place to question the price of coffee breaks or whether the office needs painting.
11. **Number of goals**. Most organizations can hone down their priorities and projects to just three to seven goals. A wise director at the planning table once reminded, "None of us will remember more than four goals so we should stop now." Nearly every organization can advance their purpose with three to five well-considered goals. Each goal will be supported by several fresh and ongoing strategies to which resources must be aligned.
12. R**eality check**. Planning should be based on reality and capacity. Brainstorming with limited resources – funds, volunteers, committees, technology and staff – is unproductive. Strategic planning can be described as the *disciplined allocation of resources*. Be sure the facilitator and planning group are familiar with available resources before setting goals.
13. **Deployment**. Most planning retreats occur over weekends; Monday morning may be the death of the plan. There are a series of steps that must occur soon after planning for implementation, including alignment of committees, stakeholder awareness, program of work and periodic progress reports.

Understanding the false starts and common traps in strategic planning will improve likelihood of success. ■

Bob Harris, CAE, provide free governance tips and templates at www.nonprofitcenter.com.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Chair's message, continued from page 2

Next, we took these themes and broke them into smaller, annual goals with specific actions, due dates and defined what we will measure.

During our WSAE planning meeting, we made one adjustment. We realized our proposed, revised mission, *Creating meaningful connections and enhancing competencies of association professionals*, was already baked into all that we do. We now have three main goals. A twist and turn we embraced.

A visual representation of our goals can be found below.

As you prepare for your next strategic planning meeting, here are three suggestions based on my positive experiences both at CUES (Credit Union Executives Society) and as a WSAE board member.

Invite staff to the table

Start by including all staff in the process, not just leadership. Asking, receiving and hearing everyone's ideas on the direction of the organization improves engagement, culture and member value.

Include a facilitator

With all staff, some of whom have never been involved in a strategic planning process, it is important to have an expert ask thoughtful questions, summarize observations and keep the conversation focused on clear and concise goals. This improves the outcome.

Provide regular updates

Keep the final goals front and center to continue the dialogue and provide updates often. Execution is the hardest part once a plan has been developed. It is inspirational to see what you are working towards and the progress being made. Focus is energizing.

WSAE is putting its strategic plan into action. We invite all of you to the table later this summer when a member survey (not long, we promise) will be emailed. We last gathered your insights three years ago, so it is time to check in again.

As we embrace building and facilitating relationships and listening to your career development needs, we will be successful in supporting our mission. ■

WSAE Strategic Plan for 2019-2022

Proposed new WSAE mission*: Creating meaningful connections and enhancing competencies of association professionals.

Themes

MEMBERSHIP GROWTH

CEO INFLUENCE

EDUCATION

Goals

Through networking, events and engagement, membership will grow by seven percent year over year, through 2022.

Hold high-value CEO events annually, increasing attendance thru 2022.

- CEO Roundtables held six times annually in each of Madison and Milwaukee.
- Executive Exchange (held annually) will grow from 10 attendees to 25, in increments of five attendees each year.

Offer 25 hours of "CAE-quality" educational programming, including ethics training.

- 15 by 2020
- 20 by 2021
- 25 by 2022

** WSAE members will vote to approve WSAE's proposed new mission statement at the 2019 Summit.*

Updated Value Proposition

Your ticket to dues renewal

by Melynn Sight and Carol Weinrich Helsel

As much as we'd like to think our board represents our grassroots members (and prospective members), the truth is that often they do not. Board members are predisposed to be highly invested in the governance of the organization and therefore plan from the inside out. They believe they know what members want. And while well-intentioned, the results can cause a real disconnect with members.

A CLEAR VALUE PROPOSITION FORCES YOU TO EVALUATE YOUR SERVICES AND COMMUNICATIONS WITH MEMBERS AGAINST A BENCHMARK THAT IS SET BY THEM.

It is the members' perception of value that will impact whether to write the check for upcoming dues, when the year just ending shows a lot of red ink.

Nearly all organizations face the challenge of overcoming a lack of awareness about the value of membership. Volunteer leaders and executives alike tend to focus on the features and maybe the benefits of membership, not the value proposition. In doing so, the organization loses an important opportunity to articulate what is really important to members and what will ensure that those dues checks keep coming. This article explains why thinking about value from the outside in – starting with what members worry most about – will help leaders begin to think, plan for, talk about, deliver and promote the most relevant portfolio of services.

Identifying your value proposition

Let's begin with what a value proposition is not. It is not a list of services. It is not classes or monthly networking breakfasts. It's not even lobbying success with local government representatives. A value proposition is your point of differentiation. It offers members a clear, sound rationale for joining, belonging, contributing and taking advantage of all that an association offers. It differentiates why a member chooses to belong to your organization, a competing organization, or none at all.

Developing a value proposition is a multi-step process that will aide in organizational planning and membership growth and loyalty. The outcome is a clear, direct claim that is relevant to your important audiences and represents what your organization does well today. The written proposition is a statement that helps tell your story of relevance in a concise messaging platform – a platform that becomes the basis for your communications.

What's your problem?

Early in the process, be clear on the reason you need a value proposition in the first place. Some organizations believe they need a value proposition to unify their staff; others know how much they offer to members, but need a clear, simple way to articulate it. With the specific motivation for your work, you can keep your focus on the goal throughout the process.

Leaders are increasingly seeing value propositions as the most meaningful step toward building and sustaining membership for associations. A well-researched and crafted proposition guides strategic planning and staff communications, and gives a purposeful approach to committee work.

Recognizing your members' needs first, and then purposefully feeding those needs into your strategic work can be a radical shift in thinking. This change in perspective has helped organizations to question everything and rethink how they plan, organize and set goals.

Invest in the process

A value proposition project is not a simple one. Ideally it includes a task force comprised of a diverse group of members across key member segments. Task force members must clearly understand both the definition of value proposition and their role in the process. The top executive should be involved in facilitating board awareness before, during and after the project. The most relevant value proposition projects begin with a value-driven member survey to uncover what the member values, if the areas that members think are most important have the highest satisfaction, and identify the business issues that cause the most member worry.

The value proposition process requires an investment. Whether you do it yourself or hire it out, you must invest manpower, energy and money to develop the message, as well as the collateral to communicate it. Then it takes energy and focus to keep it alive and growing. While you don't necessarily need expensive print collateral (hurray for email and electronic newsletters), don't kid yourself that there's not a real investment required if you're to impact a change.

A change in view

A clear, concise value proposition will change the way your association approaches its business. A clear value proposition forces you to evaluate your services and communications with members against a benchmark that is set by them. It also pushes you to make internal decisions from the members' point of view. This is a significant shift for many organizations and one that can create some meaningful dialogue about current and new services. Are the services and activities that you offer today clearly ones that mean the most to your members? This can create conflict with programs that are sacred cows – considered exempt from questioning. Embrace the new view and overcome the conflict, and your value proposition will lead to stronger programs, more effective committee outcomes and higher member satisfaction. And that means members will keep writing their annual membership checks. ■

This article originally appeared in The Executive, and is published here with permission from CalSAE.

Melynn Sight is a communications consultant. She works with local, state and national associations in many industries and Chambers across the country on projects that help to strengthen the connection between associations and their members. Learn more at nSightMarketing.com.

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10 KEY Steps in Developing and Launching a Relevant Value Proposition

1. Gain approval. When leadership considers this is a strategic initiative. their commitment to support this process will fuel it from development through implementation.
2. Determine if you'll do the project yourself or if you'll hire a third party to assist with this process.
3. Do your research: Assemble a task force of diverse members to help plan with "the voice of the member" in the front of your mind. They will determine the important audience segments – even if all members are not part of the target audience.
4. Identify target audiences. Target up to three important member segments when launching your value proposition project.
5. Determine the biggest concerns and needs of your important member audiences: THEN (and only then) what you will do today to meet those specific needs.
6. Develop a draft of your value proposition based on how your organization answers the most relevant needs of your three important member segments today.
7. Take two drafts (or your recommendation) to your Board of Directors for approval.
8. Finalize the value proposition and proof points that support it. Develop a communications and launch plan for your value proposition. Be repetitive. Use the value proposition in collaterals, on the website, in your president's introductions. Make it visible.
9. Execute your value proposition. Consider how to incorporate the value proposition into strategic planning, committee work and staff operations.
10. Verify whether you are making progress through surveying and member feedback. Report measurements back to the board along the way. ■

Chad Lawler

Executive Director, Madison Area Builders Association

How did you end up working in the world of associations?
Although I've only been working directly in an association for the past three years, I previously worked as a contract lobbyist on local, state and federal issues. Several of our clients were associations, so I developed a solid understanding of the inner workings of the association world prior to becoming a staffer. I made the transition, initially from a contract lobbyist to an in-house, Director of Government Affairs and Advocacy with the Madison Area Builders Association (MABA), prior to moving into my current role as Executive Director.

What are three things you'd like us to know about MABA?
MABA is a trade association that represents the home building industry and has a strong base of industry-related associate members. We are highly active in issue advocacy and lobbying to reduce the cost of home ownership for consumers through lower fees and shorter delays that increase the cost to homeowners. MABA has an involved and energetic group of members who truly care about the industry, as well as continue to make Madison a desirable place for everyone to call home.

You're relatively new to the role of MABA Executive Director. What was your previous role and how are you settling in?
Prior to taking over as the Executive Director, I was the Director of Government Affairs & Advocacy. Having worked at MABA previously has truly been an asset, as I was engaged in nearly every aspect of the association's operations. I was able to take that experience and hit the ground running. There were certainly some initial growing pains, as the time of the transition was less than ideal. We had to prepare the budget, as well as set up our member and consumer events, all within the initial six weeks of my taking over. We had also gone through a nearly complete staffing transition within the prior four months, leaving us with the most experienced person in their role being four months on the job. That being said, it's never bad to learn through trial by fire, and we came out of this process far more prepared for future years than if we had all eased into our roles. We remain busy with new initiatives we've started, along with bringing our consumer marketing operations in-house.

Tell us a little bit about the Parade of Homes and how that comes together each year.
The Parade of Homes is our premier event and truly the best opportunity for consumers to view more than 30 homes each year across some of the most sought-after neighborhoods. Even if you're only looking to find inspiration for a home remodel, the homes with the Parade are on the cutting-edge of technology and trends.

The process for putting on the Parade of Homes begins weeks after the previous year ends. It is truly an ongoing, year-round operation. The process for selecting the parade site locations and the lots is nearly a two-month process alone. It is truly a team effort and requires our builder and developer members to work hand-in-hand with staff and volunteers to ensure a successful Parade year.

WE ARE STRIVING TO MEET WITH EVERY NEW AND CURRENT MEMBER TO DETERMINE WHAT THEY REALLY WANT AND VALUE FROM THE ASSOCIATION. ITS ALSO GREAT TO JUST LEARN ABOUT YOUR MEMBERS AND CREATE A RELATIONSHIP THAT IS MORE THAN AN EMAIL OR TELEPHONE CALL.

Please share a favorite success, accomplishment or memory.
One of our main goals that we set for 2019 was engaging our membership. Our past leadership did a fabulous job modernizing the association and ensuring that we were on good financial footing. This gave us the opportunity to focus on what we are doing to engage our members. We want to get back to the family feel that the association enjoyed pre-recession and ensure we are offering our members services and products that they truly value. We were able to cut nearly 10% of our expenses while expanding our offerings to members. We've also built off past successes and continue to grow the association. So far, the results have been positive, with member engagement and satisfaction increasing and membership growing for the first time since the recession. There is still a lot to do, but it's a great step in the right direction.

What's one thing MABA does to keep members engaged?
We try to ensure all our members feel like they are part of the MABA family. In total, we have over 30 annual events that bring members together across varying geographic areas and activities. We know that not everyone will want to participate

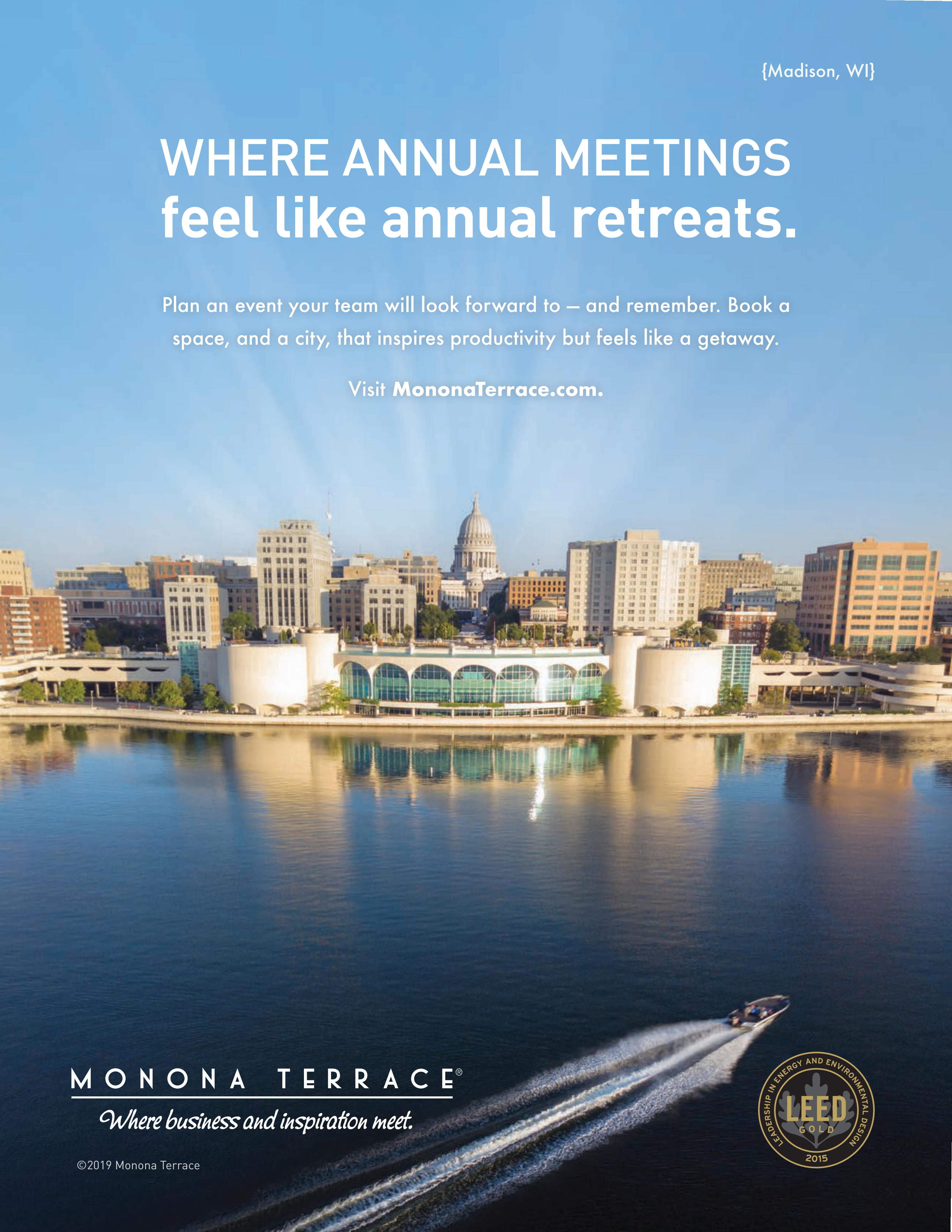
in a hockey night or clay shooting event, but we've seen members engage recently that had never been involved previously. We are striving to meet with every new and current member to determine what they really want and value from the Association. Its also great to just learn about your members and create a relationship that is more than an email or telephone call.

Are there any lessons learned you'd like to share?

With transitions, regardless if prior leadership was good or bad, there are numerous *pet projects* that members will push for during leadership transition. Couple that with initiatives brought by new leadership, and it can be too much for a small staff to accomplish without becoming overworked. Having been a part of the association staff already, I knew of several changes – some large, most minor – that I wanted to implement. We moved forward with those initiatives concurrently with several projects that our incoming President and other members had been hoping to implement for, in some cases, years. As staff, we welcomed these new projects and initiatives. It's OK to say *no*, which we had to end up doing on a couple big projects members were hoping we would also accomplish in 2019. Not everything can be done at once, especially if you want the projects to all be successful. We are now working on these large projects on a more sustainable and effective pace towards implementation in 2020.

Do you have any words of wisdom for young professionals starting out in the association industry?

I am a huge proponent of getting involved, networking and continuously learning. Whenever there is an opportunity to meet new people, take that opportunity. You never know when that relationship will bear fruit. As an example, since graduating law school in 2012, I only had to apply to one job. The rest of the jobs were offered to me when I wasn't looking for a new job and came through contacts that I had made previously. My first legal job was through an attorney I met by networking with law school alums in Wisconsin. My first lobbying job was through a connection I made while sitting on the Board of Directors for the International Law Students Association. Even the job that I applied for was through a recommendation of a mutual colleague. Relationships are the long game, you need to cultivate them over the course of years and maintain them. I love meeting people, but even if networking and relationship-building seems awkward, or at least is far from your favorite thing, just remember, there is a 90% chance the other people in the room also dislike networking. Stand out, be confident and make your introduction. By doing so, you've already made a great first impression. ■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Three Learning Technologies You Must Have in Your Education Arsenal

by Kim Harwood and Nora King

Technological advancements have radically changed how we live our lives. With unprecedented advancements, we face continued rapid change in how we work and play. Organizations who look at outdated ideas and modes of learning are falling behind. The days where organizations can rely solely on a few large, lengthy (and often expensive) in-person training events as their professional development program are rapidly disappearing. According to the Center for Association Leadership, associations would be best served by focusing on learning that is specific, competency-based and interactive. Technology allows for a wide range of possibilities in these focus areas and can offer education paths that are tailored to the learner's individual needs.

> ACCORDING TO THE CENTER FOR ASSOCIATION LEADERSHIP, ASSOCIATIONS WOULD BE BEST SERVED BY FOCUSING ON LEARNING THAT IS SPECIFIC, COMPETENCY-BASED AND INTERACTIVE.

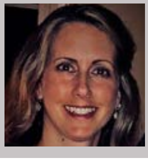
Back in 2017 (oh, so long ago), Tagoras, a management consulting firm focused on *learning businesses*, completed a technology in education survey of membership organizations. Based on the survey responses, Tagoras published the Association Learning & Technology Report, which covered trends and insight on technology to enhance education. Topics included the proliferation of webinars as well as LMS offerings. Tagoras also identified several emerging types of learning, including: microlearning, microcredentials and gamified learning. According to the Tagoras study, many organizations incorporated these new learning paths into their 2018 programs, and far more are expected to adopt such new learning paths during 2019 and forward.

If you don't have any of these learning concepts incorporated into your programming, it's not too late. Here's what you need to know:

- **Microlearning** (66.2% of those surveyed planned for microlearning options in 2018). By far the most adopted path on this list, microlearning is very broad in definition and technologies encompassed. Microlearning can come in a variety of formats but is a time-efficient way for people to gain knowledge that they need quickly. Instead of a full day of professional development, microlearning provides opportunities to learn relevant information, in brief sessions, that can be applied immediately at the time of need by the participant. Mobile learning is a widely-used platform for microlearning opportunities, such as watching videos or accessing quizzes or flashcards from your mobile phone.
- **Microcredentials** (40.1% in 2018). Digital credentials or badges are today's equivalent of yesterday's framed certificates for completion of professional development opportunities, training or certification. Participants can display digital badges anywhere relevant, such as on a LinkedIn page, within an e-mail signature or on a résumé. As an organization, you might include badges in member directories on your website or member app.
- **Gamified Learning** (30.3% in 2018). To be clear, learning through games is obviously not a new idea. Kindergarteners play games in order to learn basic concepts. Gamification of online learning for adults, however, is a fairly modern phenomenon that initially didn't receive much credit. However, when respected institutions such as The University of Michigan began to incorporate gamified learning into their classrooms, perceptions began to change and the potential began to grow. Associations can use games as a way to engage the shorter attention span of busy members, promote healthy competition and make learning fun. There are a plethora of learning games in app stores and online.

The above learning concepts can be easily implemented and provide a great start to a more diversified and engaging education program. ■

Kim Harwood is President of Resultsathand.com.



Nora King is a blogger at Resultsathand.com

Engagement in a Box

by Tom Graybill

One of the most unpredictable segments of any event are Q & A sessions.

NOW YOUR WHOLE AUDIENCE IS ENGAGED. ASKING A QUESTION IS EASY AND PRETTY FUN. THOSE NOT USING THE CATCHBOX ARE NOW WONDERING IF IT CAN BE TOSSED ACCURATELY TO THE NEXT PERSON – AND IF IT WILL BE CAUGHT CLEANLY.

Whether you handle these with fixed microphones on stands in the aisles or with microphone runners rushing wireless handheld microphones under the noses of attendees with questions, the results can be wildly mixed. And many Q & A sessions result in silence.

Many people can be intimidated by speaking into a microphone, and thus avoid participating. Others may not want to get up in front of their peers, worried that they will look foolish.

Depending on the question, some in the audience may tune out during Q & A and go back to the biggest nemesis of the modern-day meeting – the smart phone. So how do you make Q & A more engaging for your audience?

One tool that invites participation on several levels is the Catchbox. As described on its website, the Catchbox is the *world's first wireless microphone built for audiences. With its soft exterior and auto mute technology, the device can be safely passed around without getting damaged or causing unwanted noises.*

Originally developed in Finland, the Catchbox has caught on here in the U.S. It has won awards for best new meeting product and taken home both the audience and judges' best technology award at meeting industry events.

There are three different versions of the Catchbox: two with microphones already built in (one for smaller meeting spaces, the other with larger coverage), and another that uses a wireless lapel microphone transmitter from your A/V provider. Simply twist off the top of the Catchbox (it's held on with a strong magnet) and insert the transmitter. Don't forget to turn it on!

The Catchbox also requires one AA battery which powers an automute function that senses when the Catchbox is thrown and turns off the microphone until it is caught.

Did I mention that's how the Catchbox is used? You throw it! Think of the delight in the audience when Q & A is started and a Catchbox is tossed into the audience for the first question. The participant simply speaks into the top of the Catchbox, marked with an X, to be heard.

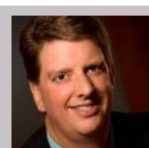
And when they are done, they toss it to the next person with a question. Now your whole audience is engaged. Asking a question is easy and pretty fun. Those not using the Catchbox are now wondering if it can be tossed accurately to the next person – and if it will be caught cleanly. Trust me, many in the audience are hoping for a fumble – or even an interception!

The Catchbox is soft and durable, with a Teflon-coated exterior to repel dirt, liquid and stains.

The cover can also be customized to add your company's logo or theme graphic from your event.

The covers are removable, so you can also brand the Catchbox with a sponsor's logo as a revenue source for your event.

Truly a marriage of fun and purpose, the Catchbox is engagement in a box. ■



Tom Graybill is Vice President, Sales for Tri-Marq Communications, Inc., and is a WSAE member.

Know Your Credit Report

Monitor the monitors

by Ryan Underwood

Credit reports are offered by many information providers. The level of quality and detail varies dramatically from provider to provider. Therefore, knowing what's in your report is key to ensuring your success as an association.

Today, an organization's information is available through multiple sources and channels. However, this doesn't mean that all information is either accurate or trustworthy. Most executives are still faced with the challenge of learning which sources of information they can trust.

When was the last time you checked your association's credit report? Which sources did you use? Most consumers who are asked if they're aware of their personal credit rating would answer, *yes*. Companies have promoted the importance of knowing one's personal credit score, especially in advance of applying for a mortgage, buying a new car, or even applying for a new credit card. However, when asked the same question about their organization's credit report and score, most executives don't have as firm of an answer.

One reason for the discrepancy is that, while there are three main consumer credit bureaus, dozens of companies offer credit reports on organizations. Each of these providers has unique ways of measuring an organization's credit-worthiness. Although consumer credit awareness has skyrocketed in recent years, credit for organizations still retains an air of mystery. That's a shame, because companies that interact with your association are using these reports every day to make decisions involving you. Your association's credit report—and more importantly, the data contained therein—is just as important to carefully monitor and protect as individual credit data.

COMPANIES THAT INTERACT WITH YOUR ASSOCIATION ARE USING THESE REPORTS EVERY DAY TO MAKE DECISIONS INVOLVING YOU. YOUR ASSOCIATION'S CREDIT REPORT—AND MORE IMPORTANTLY, THE DATA CONTAINED THEREIN—IS JUST AS IMPORTANT TO CAREFULLY MONITOR AND PROTECT AS INDIVIDUAL CREDIT DATA.

Here are some steps to help you better understand and improve your association's credit reputation:

1. Obtain copies of your association's current credit report from multiple sources.

Establishing and confirming the details contained in your credit report is as important as adhering to required state and local government requirements. The first step is to determine whether a credit report exists for your association. Some small organizations do not yet have a report established. There are many reasons for this, but until action is taken, you might not realize that your organization doesn't yet have a report. Knowing which providers currently have reports on your organization and verifying that those reports contain correct information means that you are in control of the data publicly available on your association.

2. Review, update and confirm the data with report providers.

There are several reasons why your credit report may contain inconsistencies and even inaccurate data. During a given year, organizations can undergo changes that include adjustments to the number of employees, location details, telephone numbers and more. Knowing how the report provider gathers your information will help you to ensure that corrections you make have a lasting impact. Most such information providers leverage

multiple data sources to establish your credit rating, which is why you need to review what information is reported, as well as how it's being reported. Credit managers deciding whether to lend to your organization may look at several factors when extending terms. That means that your role as the protector of your association's information can make all the difference.

3. Select which information providers you should establish an ongoing relationship with.

The final step is to determine which sources of data you should prioritize monitoring and engaging with on an ongoing basis. Data changes frequently, and it's critical that association leaders evaluate their profile multiple times per year. Like your personal credit report, it's a good idea to check and verify your organization's data roughly once per quarter to avoid unpleasant surprises. Selecting a few data providers that you trust to engage with on a regular basis is a fundamental part of maintaining your association's reputation. A few common questions you should ask when deciding which reports to continue monitoring are:

- Does this provider aggregate its own data, or do they license it from another company?
- Is the data provider reputable within their industry?
- Do you need to share your data more broadly?

These are must-ask questions if you're finding inaccurate data on a report. If the underlying data is licensed, correcting inaccuracies on their reports won't fix much. The original data source must be corrected, or you'll find yourself repeating the same motions over and over.

Ultimately, your credit score is among the most important ways that your organization's reputation is perceived. Data governance is not a one-time transaction or event but should be viewed as a recurring health check for your association. Leveraging multiple sources allows you to get a broader view of the information that's presented on your organization. You will soon realize the benefits associated with having accurate and complete details in your organization's credit report. ■

Ryan Underwood is a Business Development Manager for Credit.net, an Infogroup company. He can be contacted at ryan.underwood@infogroup.com

Moving the CAE Credential Forward

by Lowell Aplebaum, CAE, CPF, and Donté P. Shannon, CAE

The transition away from traditional learning models has created shifts in new learning management practices, having a direct impact on the credentialing world. As the future of learning and development evolve, it is imperative that the CAE credential do the same. What does this mean for CAEs? In practice, this means changes are underway. Some of these changes are happening now and some are in process, but as credential holders, these changes will impact your continuing education journey going forward.

To advance the CAE credential, these are some initiatives:

Happening now

- **Ethics requirement upon renewal** - In 2020, anyone renewing their CAE will be required to fulfill one of their 40 credits with an ethics-focused credit. Note that this credit is included in the 40 required every three years, not in addition to it. While, as the commission, we do not provide professional development options, we have shared this new requirement with the ASAE learning department, the ASAE Ethics Committee, the heads of the state societies of association executives and with all CAE-approved providers. We know a number of these education providers are planning both live and virtual ethics credits. Additionally, all existing and approved means of achieving renewal credits focused on ethics, will also count.
- **Online application and renewal** – The renewal and exam applications are available online.
- **C-Suite Application Requirement** – The qualifying employment requirement for CEO and C-suite level executives has been reduced to one year after acknowledging various pathways to leadership.

In process

- **Digital CAE recognition** – In the coming months, a new digital means of sharing your CAE credential will be announced. In alignment with other digital recognition programs, your ability to use this digital badge will be directly tied to your maintenance of certification; amplifying the importance of renewing your credential on time.
- **Computer-based examination** – We continue to research and analyze the cost/benefit of shifting the examination from its current paper format to a computer-based format.
- **Global CAE** – We understand the association community's reach extends beyond North America. As a result, we are considering the global impact of the CAE credential and have begun conversations regarding the development of a global credential with potential partner countries.
- **Competency-based credentialing** – In qualifying for and maintaining professional credentials, the credentialing world is shifting from education credit hours to demonstrations of competence, better known as competency-based education. The CAE Commission is currently designing integration of competency-based education into the CAE application and renewal process. Communication about this process and its implementation will be forthcoming.

As we evolve the CAE credential, we must remember that it is the marker of a committed professional demonstrating essential knowledge to manage an association in today's challenging environment. As we navigate fast-changing and uncertain times each day, we understand how quickly today becomes tomorrow, demonstrating a responsibility to prepare our credential seekers and credential holders to be professionals of the future. As we navigate these coming changes together, let's remain committed to moving the CAE credential forward to remain accessible, relevant, and meaningful for the association profession. ■

Lowell Aplebaum, CAE, CPF, is CEO and Strategy Catalyst at Vista Cova, and is Chair of the ASAE CAE Commission, 2018-2019.

Donté P. Shannon, CAE, is Account Executive at AMPED Association Management, and is Chair-elect of the ASAE CAE Commission, 2018-2019.

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Communicating Effectively with Colleagues Who Deny Reality

by Gleb Tsipursky, PhD

When was the last time a colleague – perhaps a member of your association or someone in your workplace – said something that made your jaw drop? As a speaker, consultant and coach in emotional and social intelligence, I am often asked about how to handle colleagues who deny the obvious.

OUR INTUITION IS TO CONFRONT COLLEAGUES EXHIBITING THE OSTRICH EFFECT WITH THE FACTS. BUT RESEARCH SUGGESTS THAT'S USUALLY THE WRONG THING TO DO.

The worst-case scenario is when your chief executive is the one in denial. A four-year study by LeadershipIQ.com, which provides online leadership seminars, interviewed 1,087 board members from 286 companies and nonprofits that forced out their chief executive officers. It found that 23 percent of these leaders got fired for denying reality, meaning refusing to recognize negative facts about the organization's performance.

Other research shows that professionals at all levels can suffer from denial of the truth. This is so common that scholars gave it its own name: *the ostrich effect*.

Our intuition is to confront colleagues exhibiting the ostrich effect with the facts. But research suggests that's usually the wrong thing to do. That's because when someone believes something we know to be false, some kind of emotional block is probably at play.

For example, at one association I spoke and consulted for, the CFO refused to acknowledge that an accountant she hired was a bad fit, despite everyone else in the department telling me that the employee was holding back the team. Facing the facts would be difficult for the CFO. Research shows that we often prefer to stick our heads in the sand rather than acknowledge our mistakes because of our natural resistance to experiencing negative emotions.

I recommend a method that can be summarized using the acronym *EGRIP: Emotions, Goals, Rapport, Information, Reinforcement*. This technique will make it easier for you to address issues when colleagues are in denial regarding the true situation.

Emotions and Goals

Rather than offering facts, try to figure out what *emotions* block your colleague from seeing reality clearly, and what their *goals* around the issue might be.

Wisconsin Reception at ASAE

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August 12, 2019 ▪ 4:30 pm - 5:30 pm
Park Street Tavern
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Columbus, OH 43215
www.parkstreettavern.com

Rapport

Once you understand your colleague's emotions and goals, try to show you share them and build up rapport with your colleague around the issue. Echo any concerns they share, to cultivate a positive emotional connection.

For instance, with the CFO mentioned above, I had a conversation about how she saw her current and potential future employees playing a role in the long-term future. I echoed her anxiety about the association's financial performance and concerns about getting funding for future hires, which gave me an additional clue into why she might be protecting the incompetent employee.

After placing yourself on the same side, building up rapport and establishing an emotional connection, move on to the problem at hand: their emotional block.

Information

The key here is to provide *information*, without arousing a defensive or aggressive response, showing how their inability to face the truth undermines their own goals in the long term. It can help to cite a prominent example of a business leader accepting difficult facts to move forward, such as how former Ford CEO Alan Mulally helped save the company through repeated course corrections.

Reinforcement

With the CFO, I painted for her a picture of a future where valuable employees, upset about the accountant she hired, left the organization. I also highlighted how she would be perceived as a strong leader for admitting her mistake.

She eventually agreed that the employee needed to go, and I emphasized the bravery and difficulty of her decision. Why? Research shows that offering positive reinforcement, without condescension, can be effective with colleagues and bosses alike.

You can learn more about this technique and others at my presentation, titled *Outstanding Association Leadership Through Social Intelligence*, at ASAE's 2019 Annual Meeting at 9:00 a.m. on August 13 in Columbus, OH. Hope to see you there! ■

Gleb Tsipursky, PhD, has over 20 years of experience empowering association executives and other professionals to address potential threats, maximize unexpected opportunities, and resolve persistent personnel problems. For more information, visit his website, DisasterAvoidanceExperts.com, or contact him via email at gleb@disasteravoidanceexperts.com.

Chasing the Right Connections for Your Tomorrow

by Allison K. Summers

I admit it, I worry about the future. Reading reports that rank countries of the world by their 'robot density' in the workforce causes me to wonder when and how the humanoids will enter the office door of my association. Headlines like *planes are too complex to fly* and *new robots can safely decommission nuclear reactors* cause me concern that when the robots do come my way, will I even be able to manage them?

BUILDING A VAST AND WIDE NETWORK OF THE RIGHT PROFESSIONAL CONNECTIONS WILL HELP YOU KEEP YOUR EDGE, SHOW YOU WHERE THE WORLD IS GOING AND SET YOU UP FOR A LIFETIME OF CAREER SUCCESS. DOESN'T THAT SOUND FANTASTIC?

But let's be honest, shall we? Before I can even prove that I can lead in the workplace of tomorrow I need to remain relevant in the workforce today – well, that and be able to get a résumé past the AI gateway that rules the automated tracking systems that first determines whether human eyes will ever even see my succinct executive summary and astounding work history.

The #futureofwork (#FOW) is a lot to think about and the truth is it demands your attention now. Will you be lost or found? In or out? Satisfied or searching? But before I let my imagination go too far with these questions, I remind myself that I know the right solution to the problem: ***building a power network comprised of the best connections in the industry.***

I firmly believe that connections move you from where you are to where you want to be and building a vast network will provide quick access to an immense amount of knowledge and significant insight. It is a short cut to other people's life lessons of personal failures. It is your own search engine to solutions for technology, applications, algorithms and that pesky AI. With the right contacts doors open, new ideas flow and economic possibilities can multiply beyond where you stand today. Connections clearly amplify your power and position; that is, if you know how to do it right.

To achieve the kind of influence that you need in the fast-paced #FOW, think about the following:

What is your connection story?

Are you expanding your network in both the human space and the digital space? Are you paying attention to your connective health score? Would you define your network as big and wide or narrow and small? Consider documenting the number of contacts you have on social platforms and then commit to stepping up and stepping outside the four walls of your office to meet new people.

Are you fearless and willing to connect with the best?

Business is driven by those who are highly connected, and connected people naturally introduce the individuals that they trust and like to others. Think *connections equal permissions*. Interacting with the right influencers instantly improves who we are and offers a degree of validation in an overwhelming world. I often tell young professionals that they must connect-up to gain knowledge that they don't have and to learn the language of executive presence. Simply put, great connections prepare the way for you.

Do you view your network as taking you boldly into your tomorrow?

You must connect like you mean business – *no, like you mean to survive*. After years in business, I profoundly know that what is a stable environment today can quickly shift as new competition enters the market or if the economy takes a sharp left turn. I talk about using connections as my *periscope vision* to see things that I can't from my vantage point. I like having relationships with people across multiple networks who can provide a glimpse of waves before they arrive on my shore. I need to know brilliant people who will fill my skills gap and can support me as I face the trends and tech to come.

Do the people in your network view you as a business partner of choice?

Do you believe that somewhere one of your connections could be saying something great about you? A personal brand is frequently referred to as *what is said about you when you are not in the room*. You need to stay in touch with your contacts, let them know what you are up to, reach out and ask questions and request referrals. Remain mindful that connections can share your story faster and further than you can. You also need to consider that if a recruiter calls them, that they just may pass the referral along to you – and suddenly that automatic tracking system gateway problem will be solved, and your next interview will be just around the corner.

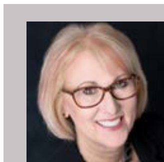
Do you think about your professional future?

In times of rapid change, it is certainly impossible for any of us to always predict what is on the horizon or to quickly recognize how to secure solutions without a little help from our business friends. But I do predict this: it won't be long until the robotics companies like Boston Dynamics realize that with over 90,000 U.S. registered associations, we represent a purchasing segment that they want to infiltrate. Soon, these clever companies will figure out how to make humanoids work in our offices and we will have an association robot density report one day of our own (however, I do admit that a robot that could make perfect coffee and produce flawless meeting minutes may be something I would be willing to budget for).

You see, I do worry about the future, but I also work to remain highly networked so I will still be standing when the future arrives.

As I say in my book *Connect to Influence*, building a vast and wide network of the right professional connections will help you keep your edge, show you where the world is going and set you up for a lifetime of career success. Doesn't that sound fantastic?

Now if you would excuse me, I must close here as my Roomba is accusing Alexa of being too bossy again. Best of luck to you as you grab hold of life's future opportunities! ■



Allison K. Summers will be a featured presenter at the WSAE Summit in October. She is the author of *Connect to Influence*, host of *Disruptive CEO Nation* and a frequent guest on radio, TV and event platforms. She is a certified association executive, champion for non-profits and international business leader but her joy is coaching business professionals on structures and systems achieve success in the future of work.

Streamlined *One City. One Contract.* process puts multiple brands under one contract when two or more hotels are needed

In what may be an industry first, Destination Madison and nearly a dozen Madison-area hotels have launched an innovative collaboration, creating a single contract for meeting professionals needing room blocks across more than one brand property. The "One City. One Contract." program eases the frustrations and complications that can arise when contracting with multiple properties for a large meeting or convention.

Working through Destination Madison, planners will sign one master contract that seamlessly stitches together multiple hotels, across multiple brands. The contract outlines terms like force majeure, indemnification, how cut-off dates are administered, and more. The hotels will issue a simple addendum to the contract that secures the client's guest room block, negotiated rates and concessions. Each addendum is the same format and term language. ■

President/CEO of the Wisconsin Hotel & Lodging Association State receives tourism industry honor from Governor Evers

Trisha Pugal, President/CEO of the Wisconsin Hotel and Lodging Association, received the state's highest tourism industry honor at the Wisconsin Governor's Conference on Tourism, with over 800 tourism industry professionals attending, on March 19, 2019. Governor Tony Evers presented the Governor's Tourism Legacy Award at the Governor's Dinner and Awards Celebration at the Kalahari Resort in Wisconsin Dells. ■

New President/CEO named for WH&LA

The Wisconsin Hotel & Lodging Association (WH&LA) is pleased to announce that Kirsten Villegas was selected as WH&LA's new President, CEO effective June 1, 2019 following the retirement of longtime President, CEO Trisha A. Pugal, CAE on May 31.

Villegas was most recently the executive leader of NAIOP Wisconsin - Commercial Real Estate Development Association, and before that was the Executive Director of the Wisconsin Builders Association. Previously she also served as the President of the Waukesha County Historical Museum. ■

Impact Association Management welcomes the Association of Fundraising Professionals Greater Madison Chapter

Impact Association Management (Impact) is pleased and proud to announce the signing of the Association of Fundraising Professionals Greater Madison Chapter (AFP Greater Madison) as their newest client. ■

Madison Club unveils its newly renovated spaces

The Madison Club, located steps away from the Capitol and downtown square, has recently renovated their spaces and is open for business! Don't miss the opportunity to wow your guests and create an unforgettable first impression. ■

AMPED chosen to manage the Women in Trucking (WIT) Foundation

AMPED Association Management, an accredited full-service association management company with offices in Madison, WI; Metro Washington, DC; and Glenwood Springs, CO, has been selected by the Women in Trucking (WIT) Foundation, to manage their operations. The WIT Foundation funds scholarships for women in the trucking industry and strives to turn jobs into careers through education and training.

AMPED's Christina McCoy, CAE, will serve as Executive Director for the WIT Foundation. ■

Stoney Creek Hotel and Conference Center unveils updated conference space

Stoney Creek Hotel and Conference Center was built for relaxation. It starts with spacious rooms and first-class customer service and continues with amenities unlike the rest. It's one of the reasons this Onalaska hotel, just outside La Crosse, earned a TripAdvisor "Certificate of Excellence, 2018."

Whether you are here for work or leisure, enjoy everything from the heated indoor/outdoor pool and well-appointed gathering places featuring custom decor, stone fireplaces, and billiards to complimentary breakfast and WiFi, a gift shop, fitness center, and LumberJack's Bar. Many frequent travelers love the outdoor spacious lounge and the breathtaking views of the protected wetlands.

The hotel's expansive spaces make it a perfect gathering place for family reunions, holiday getaways, anniversaries and birthdays, business meetings and events, sports teams, and more. And the conference center is a favorite for weddings.

For more information, contact the sales department at (608) 781-3060. ■

VISIT Milwaukee CEO resigning at the end of the year

Paul Upchurch, current President and CEO of VISIT Milwaukee, announced he is resigning at the end of the year. "It's been a long decision, but I have another opportunity," Upchurch said. "With the DNC and all the wonderful things that are happening in Milwaukee and for VISIT, it just seemed like a good time."

Upchurch has led VISIT Milwaukee for more than nine years, starting in March 2010. During his time, tourism numbers double and he helped the Democratic National Convention (DNC) Host Committee secure the 2020 bid. Upchurch will stay in his role until the end of the year to help with DNC planning as well as plans to expand the convention center. "We just need to make sure we have a convention center that can accommodate the demand we're getting," Upchurch said.

The search for his replacement has already begun. ■

WELCOME NEW MEMBERS

As of June 15, 2019

Maureen Braatz, American Academy of Cosmetic Dentistry
Sarah Decorah, Wisconsin Grocers Association
Monica Egli, Hilton Garden Inn Northwest Conference Center
Sarah Fox, The Cove of Lake Geneva
Maddy Harrison, Wisconsin Grocers Association
Taylor Heideman, Plumbing Mechanical Sheet Metal Contractors' Alliance
Tim Heinrich, Municipal Electric Utilities of Wisconsin, Inc.
Kathryn Hill, American Academy of Cosmetic Dentistry
Jonathan Kowalski, Plumbing Mechanical Sheet Metal Contractors' Alliance
Michelle Kussow, Wisconsin Grocers Association
Kelsi Roschen, Hotel Retlaw
Katie Stein, Credit Union Executives Society
Daniel Steininger, Steininger & Associates, LLC
Melinda Waite, Association Acumen, LLC
Taylor Williams, Milford Hills

The Importance of Connections

The New Focus of WSAE

by Michelle Czosek, CAE

Connections…. It's the theme of our 2019 WSAE Summit keynote presenter, Allison Summers, whose article on the importance of connections appears on page 28 of this publication. And connections seem to be a theme of mine lately, too. The power of connections has been reconfirmed in a multitude of ways in both my personal and professional life over the last several months. It started in March at our annual board retreat where we discussed at length the importance of creating meaningful connections for our members. The significance was emphasized when the board decided to propose a new mission statement which takes the focus from the growth of the association community to the growth of the individuals serving the industry. The new mission statement will be voted on at the annual business meeting as part of the 2019 WSAE Summit.

- **Current mission:** The mission of the Wisconsin Society of Association Executives (WSAE) is to serve as a forum where the association community thrives and grows.
- **Proposed mission:** Creating meaningful connections and enhancing competencies of association professionals.

Vicki Kampmeier, 2019 Executive Exchange presenter, discussed the power of a simple phone call to members, which reminded me how powerful that can be. Do you know that if you made one phone call per business day to a member, you'd make over 240 calls in the average year? That's a lot of goodwill spread and information gathered. In this world of 24-hour connectedness and the ease of sending an email or text versus reaching out with a phone call, we often forget how powerful voice-to-voice or in-person interaction can be.

Shortly after the Executive Exchange, I was in the position of interacting with more members than I typically see in one week, outside of an association meeting or event. My week started with a coffee meeting with a member that I was hoping to solicit feedback from about a recent WSAE event. The insight he shared sparked several ideas for the 2020 Executive Exchange. That same day I met up with one of our industry partner members. My original intent was to have a quick phone call to discuss something that could've easily been handled over that way. When she suggested meeting in person, I admit, I was mentally calculating how much time that would take and if I could fit it in. In the end, meeting in person won out and I'm so glad it did! This member shared her perspective on some of the things WSAE has been doing and should be doing. It sparked new ideas and will only strengthen our partnership and make her membership more valuable.

That same week, WSAE held the Madison CEO roundtable, which is always a time of sharing and new ideas. It gave me a chance to see our members learning from each other. I walked away with a page full of ideas and people to meet.

The end-of-week bonus was an opportunity to head to the Chicago area for another association. We conducted hands-on training and certification for a group of members that was interested in earning one of our three designations. It was the first time we had run the training outside of our annual convention or technical seminar, and yet it was our best attendance yet. The time spent there allowed me to put faces to names, learn more about the industry we serve, gather opinions on various association programs and be a part of the excitement (and nerves) as they ran through their practical and written exams. All things that now tie me a little bit closer to those people and allow me to help serve them better as an association executive.

If you need another opinion of the importance of connections, read the Executive Profile of Chad Lawler, CAE, in this issue. He says "Relationships are the long game, you need to cultivate them over the course of years and maintain them." I couldn't agree more with this or his advice to young professionals starting out in association management to network, meet new people and continuously learn. Like Chad, I've built a career I love through the connections I've made.

If you have any suggestions for how WSAE can help you network and build connections, grow in your professional role and do this to the benefit of your association, please feel free to reach out. I'd love to talk about it! ■

Michelle

Executive Exchange

June 2-3 ▪ Stevens Point

"Participating in the Executive Exchange is a great way to meet and interact with peers from Wisconsin. Not only do you learn valuable take-home messages from the speakers, you also have the opportunity to build a network and support system of peers to discuss both your challenges and successes with."
Jennie Socha
Executive Director, Inc.

"I find the Executive Exchange worth my time, because the content is relevant to the association world and presented by people who are experts in their discipline."
Mike Ruzicka, CAE, RCE
Greater Milwaukee Association of REALTORS®

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Pictured: Pontiac Convention Center

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