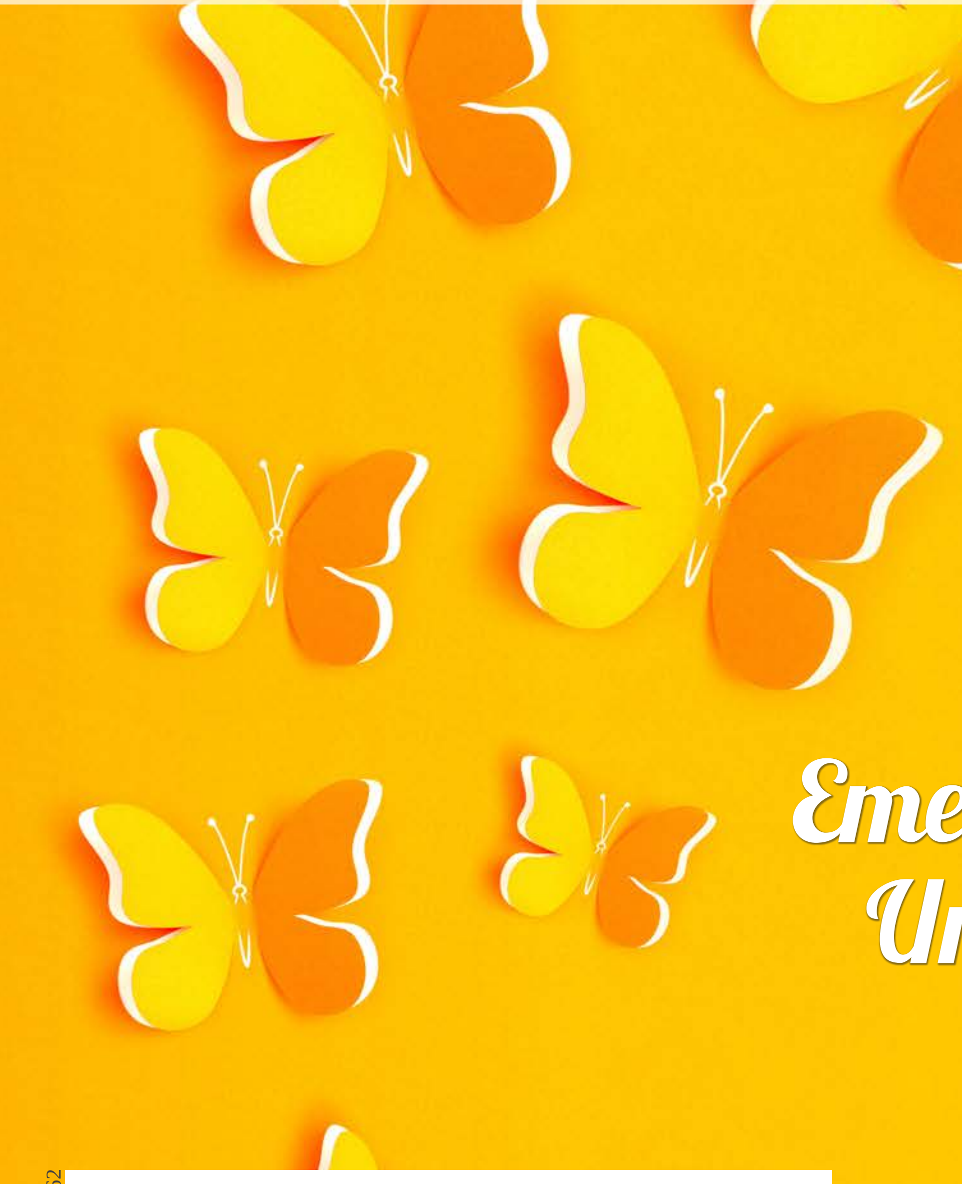
VANTAGEPOINT

Published by WSAE - Where the association community thrives and grows ■ Summer 2020



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Wisconsin Society of Association Executives
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In Crisis, We Unite

Creating meaningful connections and enhancing competencies

by Kathy Raab, CAE, CNAP

> ***If leaders have a clear way forward, human beings are amazingly resilient. There is a documented "rally effect."***
> ~Gallup Workplace, Jim Harter

WSAE's Strategic Plan 2019-2022 was developed many months before anyone saw the COVID-19 pandemic on the horizon, but it's point-on during this crisis.

The non-profit association and meetings environment dramatically changed in a very short time. The hospitality industry is particularly hard hit with revenues down over 70% of budgets. Travel has come to a screeching halt affecting business and leisure plans for many months to come. Every member of WSAE, from entry level to C-Suite has been affected.

AS LEADERS WE ARE STAYING POSITIVE, SUPPORTING EACH OTHER THROUGH CHALLENGES AND SETBACKS, CELEBRATING SMALL VICTORIES AND SHARING HUMOROUS ANECDOTES OF THE JOURNEY.

But WSAE members have united under the mission of *Creating meaningful connections and enhancing competencies of association professionals.* We are reaching out to association professionals to provide resources gathered by experts as we educate and influence our futures. We are providing membership opportunities to share our talents. We are connecting CEOs and leveraging their collective knowledge to help our industry.

As leaders we are staying positive, supporting each other through challenges and setbacks, celebrating small victories and sharing humorous anecdotes of the journey.

Do you have a clear plan of action? Are you constantly updating and preparing yourself to be a strong and steady leader in the ever-changing crisis environment? Are you communicating with your team and presenting a unified effort to carry your association/company through?

Connect with colleagues or reach out on the WSAE Connected Community when you need help or advice or, better yet, when you have some to offer. We will rally, we will lead and we will get through this together. ■


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Making Sales Less Challenging in a COVID-19 World

by Carrie McIntyre

I once asked a room full of small-staff association EDs/CEOs how many of them had to sell as part of their jobs, and everyone raised their hand. When I then asked them to keep their hands up if they liked that part of their job, just two people kept their hands halfway raised (I'm not sure if they were embarrassed to admit they like sales or didn't feel they should publicly confess their dislike).

I continued by asking the group specifically what they didn't like about sales, and the answers included: cold calling, revenue expectations, rejection, being told "no," and not feeling comfortable asking for money. All of those answers were completely understandable, since the most intimidating elements of sales revolve around a fear of failure and rejection.

If I had that conversation with the same group now, and asked how many would be comfortable with sales during a global health pandemic – when marketing budgets have been stalled and/or slashed – I doubt a single hand would raise.

Like so many other obstacles associations experience as a result of COVID-19, sales is more difficult than ever, though still an essential part of the non-dues revenue process. What was tough and uncomfortable in the past now requires even more planning, persistence and, ultimately, ROI.

WHEN YOU KNOW WHAT SOMEONE NEEDS, AND YOU KNOW YOU HAVE THE TOOLS TO HELP THEM, IT DOESN'T FEEL LIKE SELLING, IT FEELS LIKE HELPING.

Not only does your association's value proposition have to be ironclad, but you have to be able to relay that value in a way that is more consultative than salesy. You have to be able to differentiate your association's product/service from competitors and explain your *why* in a manner that gets people excited. And while sales may never be something that you're comfortable doing, with careful thought and planning, you can do it! It isn't sales when you believe in the value provided, and companies still need to find ways to remain relevant during this difficult time.

Let's break the sales process down into a few key steps:

- Understand your prospect and how the pandemic likely impacted their business (based on their industry).
- Determine what is important to them right now if they cannot meet with your members in person.
- Craft a solid story. What's exciting/compelling about your offering and what makes you different?
- Position your story well. Don't overlook the power of marketing collateral and outreach.
- Execute effectively. Be a pro with the actual sales conversation.

First, understand your prospect. What were they trying to accomplish prior to the pandemic, and where do you think they can pivot? Are they launching a new product? Entering a new market? What's their competitive position? Are they looking for thought leadership opportunities to write, lead a webinar, or otherwise contribute educational content? Would they typically be most interested in live events for lead generation purposes? Make sure you can answer these questions before you pick up the phone, so you go into the call as an understanding consultant vs. a sales person reading from a script.

You'll miss the mark with prospects if you don't get to know them. Asking your prospects open-ended questions will enable you to: (a) learn about their business to identify where you can best help; (b) build rapport and trust so they see you're trying to find the right fit; and (c) put yourself in their shoes as you think about your association's offering so you're more likely to suggest proper options. When you know what someone needs, and you know you have the tools to help them, it doesn't feel like selling, it feels like helping.

Next, it's time to craft a slam-dunk story. Most association advertising/sponsorship collateral focuses primarily on what's available and at what price, often on a form loaded with checkboxes. When I asked those same EDs/CEOs mentioned earlier if anyone ever had a completed sponsorship form sent back without any discussion, no one raised their hand.

Before your sponsors and advertisers see a menu of options and pricing, they want to know:

- Your *why*. Why do you advocate for members? What specific industry resources do you provide them in difficult (i.e. COVID-19) times? Why are members engaged and why should they be part of the action?
- Who are your members and what is their buying power?
- Why are you relevant to members? What do your members (their prospects) say about the association?
- What makes you different from the competition? How much overlap would there be with current participation elsewhere, and is the additional spend worth it?

Now that you have the elements of your story, it is important that you tell that story well. What is your first impression on a prospect when they visit your website or receive a marketing email from you? How well do you, your staff and/or members tell the story when an advertiser or sponsor is talking to them?

Telling your story well on your website and in your marketing means:

- Information is easy to find. Utilizing collateral that places importance on the *why* not the *what*.
- It is easy to get in touch with someone who can answer questions/assist in the buying process (vs. completing a form).

Once you have those things in place, you need to make sure the conversations continue the story.

Pick up the phone. The best email marketing campaign will fall short on results compared to a combination of marketing and outbound calls. I know calls are often one of the least favorite parts of sales. It takes time to get through to people, it usually takes multiple calls to get someone engaged, and a lot of people will say, "no." But there is a payoff, and you can make this process less painful.

Tips for making calls:

- If you're calling about sponsorships or larger-dollar spends, you shouldn't try to get someone on the phone to pitch them; you should schedule a discovery call. You want them to set aside time to speak with you so you have their full attention and they can give you the time to learn about their business and objectives. Bonus: It's easier to cold call for this discovery appointment than it is to cold call to give a pitch. Prepare several voicemail scripts that are short, focused on the prospect, and tease several aspects of your offerings. Keep track of which ones you use for each prospect so you aren't leaving the exact same message every time. I like to think of it as having a conversation where I'm the only one talking and my voicemails build upon each other.
- Mention a compelling statistic/demographic about your audience.
- Mention something you saw on the company's website that could be a hook.

- Mention several companies currently seeing results from their engagement with you.
- Drop a testimonial from a member or sponsor about the value they find in the association.
- Don't block off an entire afternoon or day for your calls if you aren't going to be able to stick to it. It's often easier to block off 30-minute increments across several days and protect that time for calls. If you get on a roll, then keep going, but push yourself to at least do the 30 minutes without interruption.
- These days, video calls are much more prevalent, which makes it easier for you to make a great first impression and initial connection.
- Engage your members! A happy client will always sell better than you. Ask your members to reach out to their suppliers and introduce you. If they aren't willing to do that, ask them who their suppliers are and get their permission to use their name in your outreach ("John at ABC company suggested I call you").

Schedule your follow-up calls. At the end of each call, review the action items and/or next steps and get the next call on the calendar with an invite. If someone has to reschedule, no problem, but if you don't schedule the follow-up, it's easy to fall into chase mode trying to get them to re-engage.

Remember, particularly in these times, that even the most seasoned sales professional will tell you selling is difficult and requires preparation and persistence. Many association professionals fell into this industry, and the last thing they probably thought they would be doing is sales.

But, if you can put aside any negative connotations or fears you have, create a focused pitch and remember you are creating non-dues revenue to support your association's mission and members, you'll find the process much more approachable, and maybe even a little fun. ■

Carrie McIntyre is the Customer Experience Officer at The Wyman Company (www.thewymancompany.com), where she helps associations solve their non-dues revenue problems. She can be reached at cmcintyre@thewymancompany.com or (703) 679-7614.

Hear more great tips from Carrie when you attend WSAE's Virtual Workshop this September!

The Unexpected Benefits of Taking the Annual Conference Virtual

by Amy Motyka, CMP

Facing the COVID-19 crisis this spring, the American Academy of Anesthesiologist Assistants (AAAA) acted quickly to cancel their in-person Annual Conference and host a comprehensive virtual meeting within three weeks. The original AAAA Annual Conference was scheduled April 3-7, 2020 at the Westin Charlotte for approximately 600 attendees. On March 14, 2020, North Carolina Governor Roy Cooper signed an Executive Order banning mass gatherings which made it impossible for AAAA to host their meeting. Staff worked closely with all stakeholders to determine the right timing to cancel the meeting and how to communicate that with members/attendees. We were balancing the pressure from the AAAA member community based on other news and announcements with the potential financial impact of cancellation fees in the hotel agreement, which was significant.

AAAA GAINED MORE ATTENDEES THAN EVER BEFORE (750+), WITH ATTENDEES JOINING FROM ALL OVER THE COUNTRY, SOME OF WHOM CANNOT TRAVEL TO IN-PERSON MEETINGS GIVEN TIME AND/OR BUDGET CONSTRAINTS.

By mid-March, with the association's in-person event cancelled, it was vital to move quickly on next steps because attendees rely on AAAA for CME credit to renew their medical licenses. The AAAA Board of Directors quickly approved a new technology partner (Digitell out of Jamestown, NY) and we began to design the virtual event, scheduled for April 18-22. Staff worked diligently with the AAAA program committee to prepare the previously secured speakers to deliver content virtually, as well as to replace a handful that needed to cancel. After cancelling the in-person meeting March 15, we had registration live for the virtual meeting March 23, charging registrants $175 (fellows) and $25 (students). To determine fees, we researched existing online CME offerings in our space and priced competitively.

Choosing a virtual meetings vendor was key to our success. Most importantly, we determined our event goals and objectives before creating a short list of potential companies. Key features for AAAA specifically include:

- Easy to use interface/platform (seamless user experience)
- Interaction between speakers and attendees (live online chat)
- Some interactivity for exhibitors, sponsors and attendees (exhibit hall)
- Affordable pricing given our breakeven conference budget
- Reliable customer support

Because we researched virtual meeting vendors for AAAA in March, we did not encounter issues with vendor capacity, which meeting planners are seeing regularly now. AAAA's technology partner Digitell, for example, is turning away clients for the remainder of 2020. Scheduling a basic introductory call with Hopin, a virtual meetings vendor out of London, takes up to two weeks. Other companies simply do not have bandwidth to respond to sales calls. When evaluating partners, be sure to ask questions about their sales pipeline and capability to

staff your event sufficiently. We also compared features during our evaluation process, knowing the user interface and live Q&A were key attributes for AAAA. And of course, pricing was very important as we considered our conference budget.

The AAAA virtual meeting kicked off April 18 –

- Over four days, we scheduled a combination of sessions, including live panels and recorded presentations with speakers (some that included live Q&A).
- Following the presentation, sessions were archived on the AAAA website for on-demand viewing through June 10.
- AAAA was approved for 24.5 AMA PRA Category 1 Credit(s) — 4.5 more than what are typically offered at an in-person meeting.
- The chat was active for all sessions and was been very lively with many questions and supportive/positive comments for speakers. We had an average of 150 attendees in each session.
- Additional functionality included an exhibitor/sponsor area, association information, technical support, and instructions on how to donate to AAAA's legislative fund.

Reflecting on this experience, it's easy to highlight the many benefits of taking an in-person conference online.

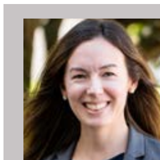
- AAAA gained more attendees than ever before (750+), with attendees joining from all over the country, some of whom may not have been able to travel to in-person meetings given time and/or budget constraints.
- In post-conference surveys, many attendees cited *flexibility to set their schedule* and *consume content on-demand* as key benefits of this platform.
- Our conference profit margin was high with significant cost savings achieved. Typical on-site expenses like food and beverage, signage and staff travel were not applicable.
- And finally, a condensed planning process and simplified timeline required fewer staff and volunteer hours.

While we saw these various perks, challenges also came up along the way. One of our top concerns was holding people's attention online over an extended period. During one of our initial planning sessions, we made the conscious decision to vary the format of our sessions, using live panels mixed with pre-recorded sessions, one speaker each. We also used a wide variety of speakers (33 across 24 sessions) and spread the content across four days. We collaborated with Digitell to design a special space dedicated to posters, where we showcased the talent of our up and coming AA students. With interactivity during the live event a key factor, we decided to incorporate live Q&A between the audience and speakers wherever possible. Our platform also allowed participants to send questions directly to speakers or type via the chat box in real time.

Facilitating attendee networking in a virtual environment is rather challenging. AAAA offered an opt-in attendee list within the platform, and we observed connections being made in real-time throughout the online chat during our meeting. In general, it will be interesting to watch meeting organizers continue to evolve this capability moving forward.

Lastly, delivering value to our exhibitors was difficult in the virtual space. We scheduled dedicated exhibit hall hours but it proved difficult to drive attendees there for meaningful conversations.

This year, the AAAA team cleared many of the hurdles that come with meeting in a virtual capacity. Next year's AAAA Annual Conference in Sandestin, Florida, is already slated as *hybrid*, and I'm confident we'll see the hybrid meetings emerge as a trend as we recover from the COVID-19 crisis and move into the next era of face-to-face meetings. ■



Amy Motyka, CMP, is Meetings Manager for American Academy of Anesthesiologist Assistants (AAAA), managed by AMPED Association Management. Amy is a WSAE member.

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Building a Virtual Conference Community - Insider Tips

by Ingrid Wadsworth, CFM, and Chad Berginnis, CFM

We had planned to pack our truck and head to Fort Worth, Texas, the first week of June for what would have been the 44th annual conference of the Association of State Floodplain Managers (ASFPM), bringing 1,200 colleagues together for over three days of more than 200 technical sessions, four plenary sessions, plated lunches and an awards celebration ceremony. One of the hallmarks of our conferences is the camaraderie among attendees, and we often throw a big closing event. Last year in Cleveland, we rented out the entire Rock and Roll Hall of Fame. And, our conference is a big part of ASFPM's overall revenue, funding our programs, scientific research, training and certification, and advocacy efforts.

Making the decision to go virtual was a huge leap of faith for us. Concurrently, many of our 37 state chapters were also cancelling their in-person conferences and deciding to go virtual, but on a smaller scale, and they were counting on us to lead.

Our leap of faith has paid off, and our first virtual conference, June 9-11, not only doubled our usual attendance, but also exceeded our anticipated net revenue from the in-person event. Plus, it has created an ongoing revenue opportunity as it transitions to an on-demand format through the rest of 2020 and into 2021.

As we gather a growing list of our best practices to share with our floodplain management community, we also wanted to share it with our fellow Wisconsin associations in hopes we can help make your virtual conference a success, too!

Start with the *why*

Our most important whys were:

- To not let our community down by cancelling after 43 years,
- To provide the robust content and continuing education credits our members counted on,
- To provide the networking, including access to experts and colleagues, that our community looks forward to every year, and
- To recover lost revenue.

Which leads to *what* and *how*

Once we knew *what* kind of experience we wanted an attendee to have, and *how* we wanted them to feel about it, it became easier to evaluate our options and make decisions on *how* to create the pieces that we knew would satisfy the *whys* for our audience and our organization.

Tip #1: Weave in the familiar. One thing the ASFPM conference is known for is "exploding your brain with knowledge." Attendees have long said it is one of the best technical conference they attend. So that is what we wanted to focus on. Our in-person event has nine concurrent tracks slotted into 1 ½ hour sessions with three speakers and a moderator in each (36 speakers) for nine sessions (324 speakers and moderators). We decided to scale back to six concurrent tracks knowing there would be some speakers and moderators who would not want to participate virtually. Our in-person event had multiple headlining plenary sessions every day for four days. For the virtual event, we chose to carry only one plenary daily, live, for three days and changed the time of the plenary to midday so attendees from all over the country could conveniently tune in. We also piped in familiar upbeat music, like we do in person, between sessions. Details matter!

OUR LEAP OF FAITH HAS PAID OFF, AND OUR FIRST VIRTUAL CONFERENCE, JUNE 9-11, NOT ONLY DOUBLED OUR USUAL ATTENDANCE, BUT ALSO EXCEEDED OUR ANTICIPATED NET REVENUE FROM THE IN-PERSON EVENT. PLUS, IT HAS CREATED AN ONGOING REVENUE OPPORTUNITY AS IT TRANSITIONS TO AN ON-DEMAND FORMAT THROUGH THE REST OF 2020 AND INTO 2021.

Tip #2: Find a contractor with expertise in technology and production. With only 23 employees at ASFMP, it soon became clear to us that we did not have the capacity to run a virtual conference ourselves. Unless you are a very large nonprofit with a robust in-house IT department, the added stress and complexity of trying to do the entire virtual conference yourself will be challenging, if not impossible. Remember everyone is doing online events right now, including distance learning and webinars, and you want your virtual conference to be a cut above—you want it to be memorable for all of the right reasons. In our case, we created our *whys* and *whats*, and then sought a contractor that could meet those parameters. While this came at a cost, we knew, based on our budget and break-even scenarios, that we could make it back through registrations and sponsorships. From there, our contractor handled both the technology and overall production so our staff could focus on the program, content and filling in as moderators and presenters.

Tip #3: Focus on quality, and don't try to do too many new things. There are a lot of interesting possibilities out there and one could be tempted to try all kinds of new things. But remember, putting on a virtual event itself is a huge undertaking. Simplify and focus on the quality of the event rather than trying to re-create the in-person event entirely. For example, our traditional in-person conference consists of a three-day technical conference and large exhibit hall, bookmarked on both ends by workshops, and lots of internal business: 14 policy committee meetings, 10 regional meetings, a membership meeting, foundation meetings and live auction, certification meetings, evening socials, hospitality rooms and other special meetings. We intentionally chose to jettison the internal business aspects and workshops as they just added complexity. Being in front of your computer for three days nonstop was long enough, and so we focused on the heart of the technical conference. By narrowing the focus, we were able to deliver a quality experience, which included interactive features such as live moderation, Q&A and chat for all concurrent sessions and plenaries.

Tip #4: Reach out personally to your sponsors and talk to them very early on. Sponsors and exhibitors are a major part of our event, in terms of both conference experience and revenue. One of the first things we did was reach out to our major sponsors with a personal phone call to discuss what we were thinking, understand any concerns that they may have, and try to address those. That guided us to create a new prospectus, with reduced (almost half) sponsorship levels and different benefits. Many of our longtime supporters asked us to keep their pre-paid sponsorships, and we reciprocated in kind, by offering to apply the extra as a credit to next year's conference. Because most sponsors were new to managing a virtual exhibit booth, we made sure to provide ample training/mentoring from the technology contractor as they set them up. As a result, we lost very few sponsors as we pivoted to a virtual conference.

Tip #5: Repurpose the content. A major selling point of a virtual conference, which also gives you justification for premium pricing, is the ability to record the whole thing and make content available on-demand. Our contractor provided a solution that allowed on-demand viewing (and even purchase) of the conference for up to a year after it was over. I think that became a big benefit and selling point, especially with the uncertainty of COVID-19. Plus, a common complaint we get during our traditional conferences is that we offer too many good sessions at the same time. For the first time ever, attendees can see every single session of the conference on-demand.

As an additional consideration, we run the nation's Certified Floodplain Manager certification, which requires 16 CECs (continuing education credits) every two years. With virtual, we made it clear that only registered attendees would be eligible for the 12 CECs for attending the conference and that we would verify that they were logged in for at least 12 hours through the end of June in order to qualify. This alone prevented the sharing of login information, as only registered attendees were allowed to get CECs. In addition, our contractor is creating a separate online platform for those who want to view on-demand sessions for CEC credits in the future.

Tip #6: You are putting on a show! Whether you decide to venture forward with or without a production company's assistance, here are a few things we learned about putting on a seamless production:

- **Have your speakers pre-record their presentations.** If you are juggling technology and questions, knowing the quality of the video and sound ahead of time will be one less distraction to troubleshoot on your conference day. This approach also allows you to edit presentations ahead of time to fit in the allotted time.

- **If you pre-record, have the presenters do the Q&A live on conference day.** Just be sure to have them in the same exact physical location and with the same clothing as the recording This will give the appearance that your presentation is indeed live too and provides a better experience for attendees.
- **Invest in a headset or earpiece.** Laptop sound is bad, generally, and your presentation is useless if your audience is straining to hear you.
- **Consider your backdrop.** Zoom allows you to green screen a background, and import your own. Or, consider an interesting, but neutral backdrop. A white wall is always better than distracting things such as an open doorway or co-workers or family walking past.

Tip #6: Pay attention to pre- and post-event administrative tasks. Registration fees and processing registrations were simplified for our virtual event. The usual tiered structures, depending on your membership category and time frame, were eliminated and we simply went with $300 for members and $350 for non-members through the Friday before the conference. After that, registration went to $350 for everyone. A week post-conference, we sent a mass email to our registrants, thanking them for attending, and announcing both that the on demand feature was ready and available now through January 31, 2021, and also that we would love to receive their feedback, with a link to the follow-up survey.

Like venturing into online webinars years ago, moving to a virtual conference was a leap of faith that has paid big dividends. We would definitely do it again and are now considering adding a virtual component to our in-person conference planned in Raleigh next year. ■


Ingrid Wadsworth, CFM, is Deputy Director of Operations and **Chad Berginnis, CFM,** is Executive Director at the Association of State Floodplain Managers (ASFPM). For 45 years ASFPM has been a leading voice for floodplain management, science, and policy. While the mission is public, they have 19,000 members, 11,000 certified floodplain managers, and 37 state and regional chapters. www.floods.org @FloodsOrg. Ingrid is a WSAE member.

Essential Tips for Making Virtual a Reality

by Tom Graybill

The meetings and event industry has been forever changed by the effects of the COVID-19 pandemic. As companies, associations and organizations seek to replace their in-person gatherings, many are turning to virtual events to continue to communicate and connect with their audiences.

Here are a few items to consider as you make your virtual event a reality.

Types of virtual events

Let's start by looking at different types of virtual events. First, the phrase *virtual* in this article relates to an event delivered solely online, especially a meeting that in the past was delivered solely in person. A *hybrid* meeting includes virtual elements which are combined with an in-person experience.

The verbiage used for the types of virtual events is often interchangeable. For example, the phrase *virtual meeting* could literally be used for any online gathering. This flexibility in the use of this term stresses the importance of being clear about what your program requires, in order to make sure you get the solution that fits your needs best.

As we survey the virtual landscape, we use three buckets for most production.

- **Virtual Meetings** – These events involve small groups of attendees, perhaps 50 or fewer, who are often able to communicate with each other directly, either through the microphone on their computer or through a chat function. A host or moderator typically leads these sessions. An example of this would be a virtual board meeting or committee meeting.
- **Webinar/Webcast** – Webinars and webcasts typically include a speaker or group of speakers delivering content to an audience that tunes in to view the presentation. The audience members are not seen and can't communicate with others in the audience. Chat, polling and other means can be used to provide interaction between the presenters and the viewers, though this is often moderated before being disseminated. A single or multi-day user conference, sales meeting or employee event are examples. In general, most hybrid events would fit into this category.
- **Virtual Conference** – The virtual conference is just that – a virtual representation of an in-person event. Common features include a lobby where attendees can select from different *rooms* to watch the keynote address, attend breakout sessions, visit trade show booths, download documents and connect with other attendees. The goal is to emulate a *real* conference interaction for users, immersing them in a variety of activities.

Virtual events can often be a mix of these three broad areas, as each satisfies different needs.

Virtual Platforms

One of the most important steps in planning your virtual event is selecting the right platform. This is an ever-expanding universe, as the spike in demand has led to rapid growth in options and opportunities.

THE PHRASE *VIRTUAL MEETING* COULD LITERALLY BE USED FOR ANY ONLINE GATHERING. THIS FLEXIBILITY IN THE USE OF THIS TERM STRESSES THE IMPORTANCE OF BEING CLEAR ABOUT WHAT YOUR PROGRAM REQUIRES, IN ORDER TO MAKE SURE YOU GET THE SOLUTION THAT FITS YOUR NEEDS BEST.

There is no one-size-fits-all solution in the marketplace. Each platform has different strengths and weaknesses that need to be evaluated before trusting it with your content and your brand.

Customizable solutions that can be built specifically for your needs and requirements give you the best fit, but this requires time for planning and execution. Off-the-shelf answers are quicker to implement, but may not provide the branding and personalization desired.

Technical support also varies based on platform, with the more customized programs promising more hands-on help.

Realize that the platform is essentially your digital ballroom. It is important to make sure it looks and works the way you want it to, so you get the results you are seeking.

Timing

Much like an in-person event, the best virtual events require planning. A simple virtual meeting can come together quickly – think about that Zoom call that you set up with your staff for later that same afternoon. But when presenting to an audience, you need to map out your show just as you would if you were hosting at a hotel or other venue.

A rough schedule for pre-production would be 30-90 days to pull together the technical and aesthetic components.

And, much like booking a hotel in a popular location, many platforms are reaching maximum capacity due to the high demand. You may need to compromise on the dates of your show due to availability.

Content/Presentations

As the saying goes, *content is king*. This is even more the case for virtual events, as the audience isn't as captive as one in a ballroom. Speakers need to understand the viewing experience for the audience and adjust their presentation to take this into account.

This may involve adding polling or other audience engagement to maintain the connection. Keynote speeches could be recorded and played back, with the speakers available for Q&A in chat during their entire presentation, instead of just a few minutes after the speech. Key papers and other information could be loaded into a platform to enhance comprehension.

As noted, you may want to record the presentations for playback during your virtual event. This adds a layer of control to the proceedings, as the pieces can be reviewed and polished before airing, and it limits some of the uncertainty inherent in online connectivity.

Live delivery does offer a sense of presence and engagement. To keep the meeting feel, you may want to consider having your host and presenters appear in a stage setting, complete with stage, lighting, lectern, drape, etc., to give viewers the feeling of actually being in the ballroom.

If your presenters will be remote from their location, you will want to review their set up and perhaps enhance it with a professional microphone and a backdrop or green screen.

In any case, be sure to rehearse, rehearse, rehearse!

Engagement

Great speakers know how to engage their audience, not just talk at them. This is incredibly important in the virtual arena, as distractions for those viewing from home or in their office can be immense.

Active chat, polling and even gamification can be used to keep your viewers' attention and make sure your messaging is delivered. Breaking up a presentation with these types of elements keeps the broadcast fresh and compels the audience to be active participants instead of passive listeners.

Don't limit engagement opportunities to take place only during the speeches. Take advantage of the online environment to enhance the interactivity with pre-show elements that can be as simple as submitting a photo of a pet or other simple task that helps make the attendee part of the show.

Other tools for engagement can help boost sponsor recognition, like video openers and bumpers to introduce speakers, or breaktime countdowns with fun facts or trivia.

The screen is your ballroom. Make the most of it.

Budget

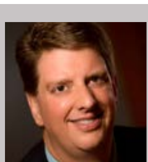
The budget for your virtual event can depend on a number of factors:

- Platform
- Length of event

- Number of presentations
- Audience size
- Registration/security requirements
- Level of customization
- Depth of features desired

Deciding on the right mix of design and services is crucial in finding the right solution for your event. Making decisions solely based on price can damage both your virtual event and your credibility with your audience, potentially jeopardizing your future in-person meetings. Audiences have grown more sophisticated with this technology as more and more people have had no choice but to adapt. Expectations have been elevated from just a few years (or even months) ago.

The virtual universe is just that, a universe. Careful exploration is needed to make sure your virtual event delivers a great experience for your audience. ■



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

From Virus to Value

Demonstrate membership value with an interactive calculator

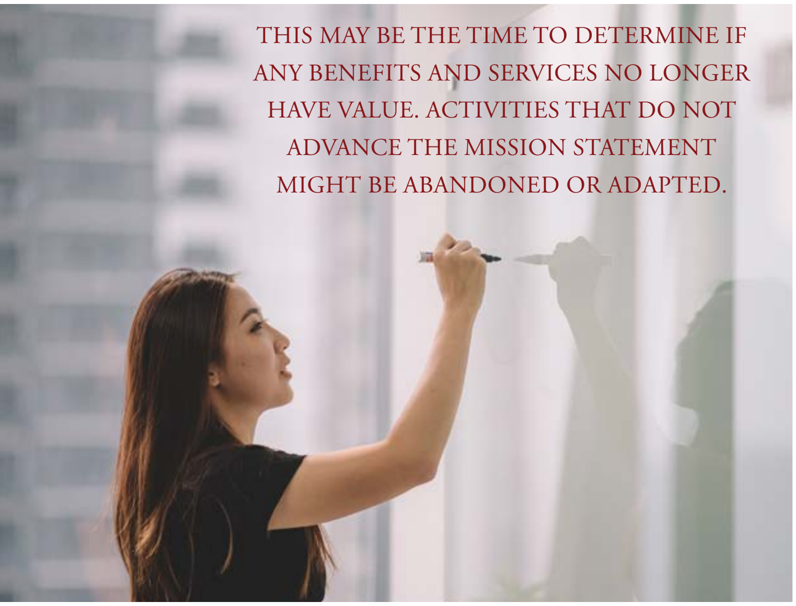
by Bob Harris, CAE

For months, associations have reacted to the pandemic. It is time to transition from the virus to communicating value. Demands from members for solutions and services have increased two-fold during uncertainty. Staff and volunteers have rallied to serve and protect members. When dues renewals are distributed, how will the association communicate value? Members should be reminded of the return on investment (ROI) compared to dues paid. Appoint a team to determine a value of association benefits.

What may have changed? Some programs have been cancelled or postponed as new services, bulletins, education and advocacy initiatives have been added.

Demonstrate value by adding an interactive calculator on the association website. It automatically tallies savings on tangible and intangible benefits. Develop the calculator with these steps:

Sort the services. Appoint a team to identify every activity, benefit and service. The list could be over 100 items when they consider access to expertise, digital bulletins, performance reports, research, etc. The list will include conferences, education and advocacy among the myriad of benefits. Sort the list by categories such as education, advocacy, solutions and connections. Alignment with the goals in the strategic plan would be smart. This may be the time to determine if any benefits and services no longer have value. Activities that do not advance the mission statement might be abandoned or adapted.



Assign Worth. Identify the value of services, realizing much of it will be speculative. Every service and solution has a value. Make your best guess, including costs of operations, overhead and time. Distinguish the costs between members and non-members. Realize that even your most mundane services have value for the people calling for help. Some of the value may include how the association's advice can save a company from fines for non-compliance. If a member calls staff for help and talks for an hour, what would that value be? If a program has potential to save a member thousands of dollars, try to estimate the value.

Beyond ROI, consider return on relationships (ROR). Associations connect members within their community. They facilitate access to experts and leaders, and offer mentoring. Ben Bolusky, CEO at the Florida Nursery, Growers and Landscape Association (FNGLA) says, "Though it may be challenging to ascribe value, recognize even your most seemingly intangible benefits or services have some real tangible value."

Integrate technology. The exercise can result in a letter or brochure about the value of membership. It is more effective, though, to turn it into a live calculator. It will communicate the reasons to join or renew along with the savings associated with each benefit. Members and prospects can use the calculator to determine association value and opportunities.

When it's time for your members to consider renewal, be prepared by updating or creating a customized value calculator that indicates ROI and ROR. ■

Examples of value calculators are found at FNGLA and TMA:

- http://www.fngla.org/membership/roi
- https://www.texmed.org/roi/

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

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Networking and Engagement: An Association's Digital Ecosystem

by Jocelyn Fielding

When someone hears the term *networking*, they might think of a social event where people exchange information and ideas. When we talk about networking here, we'll be talking about the network of platforms your association uses and how important the utilization of these digital ecosystems is to keep members engaged.

Associations are concerned with providing their audience a holistic experience. Today, a member's first experience with an association is probably going to be online, where they'll determine if they want to join.

Once they join, this is where they go for information, educational opportunities, job searches, managing preferences, communication and more. And all these separate functions most likely live on different digital platforms—association management systems (AMS), learning management systems (LMS), communities, job boards, marketing automation platforms and web event software, to name a few.

So, how do we keep members happy and engaged in a network of systems?

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

Integration

Yes, this may seem like an obvious answer, the low-hanging fruit, but that doesn't mean it's not important. In order to provide a seamless experience and keep your members engaged, it is crucial that they can easily move from one platform to another without remembering a plethora of website URLs and passwords. This is where a true digital ecosystem is created.

Today, integration is typically an expectation, rather than a nice-to-have. However, that doesn't mean all your systems can and will integrate seamlessly or easily. When you decide to evaluate your digital solutions, make sure you understand how they currently work together and, if not, their potential to work together. Be sure to keep this in mind when looking at new platforms as well.

Integrated systems not only provide a seamless experience when going from one platform to the other, they also allow interaction with multiple platforms at once. For example, integrating your LMS with your community can allow for deeper discussions to take place around courses and can promote more peer-to-peer and social learning than just traditionally completing a course within an LMS. When courses are completed, users can display certificates and badges within their community profile and all of the activity can be written back to the central database of record: the AMS.

All-in-all, the bottom line of integration is about making the learner experience as seamless and easy as possible while providing a rich learning experience through integrated solutions. However, we can't forget about what integration does for the administrative side, as well. The ability to push and pull activity and data from one platform to another can make it easier for administrators to run reports and gather information from one central repository versus having to perform the same activities in each platform separately.

Content

Associations are facing increasing pressure to provide content specifically for individual needs rather than just generic ever-green content. The personalized experience is now an expectation, and associations are striving to exceed the expectation and trying to understand what's at risk if they don't.

With companies like Netflix and Amazon dramatically impacting consumer behavior, your audience is now expecting convenience, an intuitive and user-friendly experience, and recommendations that engage them with new products and benefits. If your audience is not receiving a similar experience from your association, they are either left dissatisfied, yet stuck within the confines of your solutions or empowered to seek out providers who will meet their needs.

By sending members down learning pathways where marketing content and event promotions are based on previous consumption, you're more likely to leave your members satisfied and engaged. By understanding what different segments of your audience are most interested in and the types of content they are most often consuming, you'll be able to make more informed decisions on future content creation, as well as the way you market and bundle pieces of content together.

Data and analytics

While the end user's experience is extremely important, there is plenty going on in the back end of your digital ecosystem that can be vital to your organization's success. Each system you are using is collecting different tidbits of data that can then be analyzed. As mentioned earlier, integration is the first step when it comes to networking your digital solutions, but what you do with those integrations is important as well. Being able to write back different data sets to one central digital location can make it easier for you to have a 50,000-foot view of your members and what they are doing. Where are they going, what content are they consuming and what are they completely ignoring?

The next step goes hand-in-hand with content creation. Armed with data and analytics tools, you can now make educated decisions, such as increasing content on popular topics, adjusting fees, bundling items, running special promotions, updating sites, fine-tuning marketing focus, and so much more.

The center of the ecosystem

The center of an association's digital ecosystem is most likely going to be the AMS. The AMS houses the association's data and can integrate all the components of the ecosystem. This central focus allows you to follow the member's lifecycle and discover valuable data on each customer interaction. This insight makes it easy for association staff to understand their value proposition. This becomes the member's go-to resource to help them reach their goals within the association, whether it be to increase their industry knowledge, further or change a career, or to simply continue receiving their required continuing education credits.

Through integrations within your association's digital ecosystem, your AMS can serve as the starting point for a member by showcasing jobs, offering content based on individual needs and wants, providing opportunities for events, networking and learning, and so much more.

If built properly and leveraged in the right way, taking this holistic approach can help an association with their search for non-dues revenue, increased member retention and new member recruitment. Utilizing the data in the AMS can help drive different member benefits and promote new opportunities.

Where to start

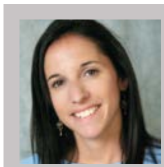
Take an inventory of your platforms and see if they all work well together—or if they work together at all. Then assess what you need to do to reach your longterm goals. Maybe you have an AMS but it doesn't connect with your LMS. What type of data is your LMS telling you that will help you create a better experience for your members? If your LMS connected with your AMS and could feed this data back to that central repository, would your systems do a better job of giving you an overview of your users and their behavior while also saving you time?

Do some research. Survey your members and consider everyone's information needs when designing the questions. Knowing how you'll use the information you gather is important, too. Knowing what your members are looking for, and then providing it, will help you retain the members you have and acquire new ones in the future.

It's also important to remember that surveying your members doesn't truly measure behavior but measures their perceptions of behavior. Evaluating survey results with platform data and analytics is the best way to gain insights.

Conclusion

Every association is different. Some utilize more platforms than others, and some are leaps and bounds ahead when it comes to networking their digital ecosystem together and engaging their members. No matter where your association falls, it's important to remember that most associations' members are more alike than you think and will be expecting their association to impress and engage them in this time of ongoing digital transformation and innovation. ■



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Cash Is the Life Blood of Business – Six Tips for Making it Flow

by Julie Wood

Without cash you cannot keep your organization going and growing. Planning for cash is as important as planning for revenue and is especially important in a time of crisis such as the one that many organizations are facing due to COVID-19.

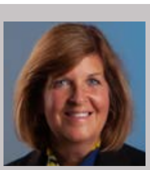
Here are six tips to help you manage your cash flow in good times and bad.

1. **Invoice your members.** This is probably the easiest to do but it is amazing how many organizations don't get their invoices out on a timely basis.
2. **Change your terms to net 15.** There is nothing wrong with changing the due date to 15 days from the invoice date instead of 30. You may not get paid within 15 days but if members are entering the due date in their system when they receive an invoice, chances are you will get paid faster if you indicate 15 days rather than 30.
3. **Know when your member pays.** Many organizations have processes set up to pay invoices once or twice a month. It's important for you to know what their process is and what dates they pay. That way you can make sure you have your invoice in front of them when they are processing payments. It is also beneficial to get to know the person who pays the bills. A simple phone call to get to know them and find out what information they need to process your payment can go a long way.
4. **Follow-up.** It doesn't hurt to send a reminder or call on the phone if you don't receive your payment on time. Your invoice may have gotten lost in a pile or just overlooked, so a quick follow-up may get you on top of the pile.
5. **Cut non-essential costs.** Do you have any recurring or unnecessary charges that could be canceled or postponed? Do you cringe every time a particular subscription is auto-renewed? Now is a good time to take a hard look at those and any other costs that are not adding value.
6. **Create a plan for cash.** This is important any time, but especially in times of crisis. It's always a good idea to put a percentage of your cash away in a separate account. Similar to putting away 10% in a retirement account — you won't miss it if you do it automatically, and then it will be there when you need it. Next, create a plan for how much cash you need each month to run your association and where it will come from.

In times of crisis, you may have to get creative and come up with some new ways of generating cash and eliminating unnecessary costs.

I have been brushing up on my reading during this time of staying *safer at home* and have found two books that are very helpful with cash planning, if you want to go more in depth.

- *Profit First: Transform Your Business From a Cash-Eating Monster to a Money-Making Machine* by Mike Michalowicz. If you have difficulty planning for cash, the system in this book may help you become more disciplined in doing so. It turns the traditional accounting system upside down and teaches you to focus on profit instead of top line revenue.
- *Happy Money* by Ken Honda. This book will help you define what your money personality is and how it affects the way you see and feel about money. This provides key insight into how you deal with cash in life and business, and can open your eyes to the reasons why cash may or may not be flowing for you and your association. ■



Julie Ann Wood is a presenter and the Chief Cultivator at Eseedling (eseedling.com). She is the author of *More Than a Lemonade Stand*, as well as co-author of the *First Steps to Starting a Business* online course at the UW-Madison Small Business Development Center. Julie is a WSAE member.

Train Your Board: The Fine Art of Reading Financial Statements

by Betsy Smith, CPA, MST

Do your board members find themselves wondering where to focus when looking at the organization's financial statements? They know all those numbers are important, but they may not be sure how to interpret them or what questions to ask. The role of a board member includes a fiduciary duty of care to oversee operational results and to communicate those results to stakeholders. They need to understand the financial health of the organization so they can contribute to data-driven decisions regarding the strategic direction of the organization.

At Association Acumen, we've found a variety of ways to help board members easily understand the financial reporting process, one of which is to show them rather than tell them. We find that video supplements this and provides a powerful punch to our board leadership development. Studies have shown that people remember 80% of what they see, but only 20% of what they read or hear. We recently created a five-minute video entitled *How to Read a Financial Statement,* which is a part of our board orientation program at the start of each board cycle. The video includes these vital points:

> VIDEO SUPPLEMENTS COUPLED WITH REGULAR MONTHLY FINANCIAL STATEMENTS AND TREASURER TRAINING NOT ONLY INCREASES BOARD TRANSPARENCY, BUT ASSURES TRUST AND SECURES THE ORGANIZATION PARTNERSHIP FOR THE LONG-TERM.

Dispelling the myth of a 'non-profit'

The financial health of an organization starts with making a profit. Although the organization is a not-for-profit entity, it must make a profit or it will cease to exist. The term *non-profit* means that the organization's net profits do not belong to any one individual or group of individuals. The mission of most non-profit organizations is carried out through collection of profits in some years, with those funds being strategically invested into initiatives in other years.

Understanding the importance of reserves

Accumulated profits or reserves allow an organization to fund spending during peak times of the year when revenues might follow later in the year, or they might provide a savings account for unexpected cash flow shortages, expenses or losses due to unforeseen events or economic conditions. Most organizations have financial and reserve policies which indicate when these reserve funds can be used, who is authorized to use them and how this is reported to the board and other stakeholders. While the needs of each association differ greatly, according to the 2019 Study on Nonprofit Investing, the average association with a budget of less than $2 million has reserves that are equal to 80% of their annual budget.

Untangling the terms

The **statement of financial position** provides a snapshot on a specific date. It has three main components: assets, liabilities and net assets. This snapshot allows you to assess the financial health of your organization.

Assets will include your bank and investment accounts, fixed assets such as a building or furniture, accounts receivable and prepaid expenses.

Accounts receivable are items already recorded as revenue as they have been committed to for the current fiscal year, where the cash has yet to be received.

Prepaid expenses are items paid for by the organization, for which the related goods or services will be received and recognized as expenses in a future fiscal year.

Liabilities will include accounts payable, debt and deferred revenue.

Accounts payable are items already recorded as an expense, where the payment has not yet been issued as of the end of the reporting period.

Deferred revenue is cash collected by the organization for goods or services which will be provided by the organization and recognized as revenue in a future fiscal year.

Net assets include the organization's unrestricted, designated and restricted net ssets. Unrestricted net assets are not subject to any limitations, designated net assets have been earmarked by the board for a specific purpose, and restricted net assets must be used for specific purposes as designated by the donor. The total net assets on the statement of financial position indicates the net worth of the organization, which is a guide to assessing the organization's long-term sustainability.

The **statement of activities** reports revenue, expenses and gains or losses on investments or other assets, which result in the change to net assets for the fiscal reporting period. Most statements will include columns for reporting the current month, fiscal year-to-date, current fiscal year budget, year-to-date variance between budget and actual, and prior fiscal year results.

Questions to ask

- Based on where the organization is in its membership cycle or if the annual meeting has occurred, how does this fiscal year compare to the last?
- Are there revenues significantly under budget when you would expect more at this point in the fiscal year? Are there expenses significantly over budget? Ask questions as to why these variances exist and how management plans to address them if they negatively impact the bottom line.
- Is the organization too dependent on one particular source of revenue? Or is it diversified such that a significant economic event would not impact the sustainability of the organization over time?

Increased transparency

Video supplements coupled with regular monthly financial statements and treasurer training not only increases board transparency, but assures trust and secures the organization partnership for the long-term. The goal is to empower board members with tools and confidence to read and interpret financial statements, and to review and approve budgets to protect the organization's assets. ■

Betsy Smith, CPA, MST, is President at Association Acumen, LLC, a full-service accredited association management company (AMC). Betsy is a WSAE member.

More from Association Acumen's Betsy Smith, CPA, MST

Train Your Board to Read the Five Areas of an Audit Report

An integral part of board training and orientation is instilling the concept of fiduciary duty. An audit is an in-depth review, using established standards, to verify that the information presented in the organization's financial reporting is correct. An audit provides the highest level of financial review by an independent CPA.

Being able to read and understand the contents of this audit report is crucial. Often, board members look at the audit presentation as a perfunctory review of copious documents that are difficult to decipher. There is a confusing array of terms: clean audit, unqualified opinion, unrestricted net assets, Statement of Financial Position. What do they all mean? At Association Acumen, we decided to try something different. We created an easy to follow four-minute video covering the five basic areas of an audit report.

1. The introductory letter identifies the responsibilities of the board and the independent auditor. The letter explains that the auditor has examined the financial statements of the organization in accordance with generally accepted auditing standards and has performed appropriate tests to make a reasonable assessment of the organization's financial processes. The letter also contains the audit opinion. The most favorable opinion is an unqualified opinion, meaning that management provided all the necessary financial documents and met all auditing requirements. A qualified opinion means that while the majority of documents were in order, the auditor found some exceptions. An adverse opinion states that the organization's financial records were inaccurate, incomplete or not in compliance with generally accepted accounting principles.

2. The Statement of Financial Position reports the organization's assets, liabilities and net assets.

3. The Statement of Activities reports the revenue and expenses of the organization.

4. The Statement of Cash Flow describes changes in cash from one year to the next created by the items reported on the statement of financial position and statement of activities.

5. The Notes to the Financial Statements or Footnotes provide important explanatory information and context to help understand the information presented in the audit. Included in the footnotes is the Schedule of Functional Expenses that breaks down expenses by functional area, such as program services, including education and the annual meeting. The independent auditor will also issue a management letter, separate from the audit report. The management letter provides recommendations for operations, internal controls, changes in financial reporting standards that impact the organization and potential risks. ■

Managing the Return to Work: Key Legal Considerations

by Ann Barry Hanneman

During the COVID-19 pandemic, employers need to be aware of the legal pitfalls and be proactive to assure employees, clients and visitors are working in or returning to a safe work environment. Likewise, associations must place a priority on assuring a safe environment when resuming in-person meetings and conference activities. In both instances, the highest degree of care and attention must focus on health and safety, complying with relevant laws, regulations and applicable public health guidance and adequately communicating expectations to make sure precautions are followed.

With proper preparation, careful communication and continued monitoring, both employers and associations can be successful in navigating this challenging legal landscape and minimizing exposure to legal liability. This article provides an overview of the most critical issues and recommended steps to safely reopen and continue business activities during the pandemic.

AS FOR WAIVERS SIGNED BY EMPLOYEES AND/OR CONFERENCE PARTICIPANTS, THEY ARE UNLIKELY TO BE ENFORCEABLE BECAUSE SUCH WAIVERS GENERALLY VIOLATE PUBLIC POLICY.

Role in implementing and facilitating safety precautions

For both employers and associations, safety is the overarching priority and all employers and associations must work hard to instill confidence in employees, members, visitors and guests. Employers must provide a workplace free from recognized hazards likely to cause death or serious harm under OSHA's general duty clause. Therefore, all employers must take steps to minimize exposure and to develop and implement strategies designed to stop disease spread. Employers must also comply with all applicable requirements imposed by federal, state and local governments and recommended public health guidelines. A more complete discussion of the scope of an employer's legal obligations during the pandemic is addressed in a series of articles at: linkedin.com/in/annbarryhanneman.

Associations are urged to reinforce and facilitate recommended precautions when planning for in-person meetings, member activities and conferences (if such meetings cannot be held virtually) and should ensure compliance oversight with any laws imposed by federal, state and local government (like a face mask requirement, public gathering limitation or travel restriction mandate). While there is no employer/employee relationship, associations are encouraged to look to employer mandates for guidance in planning safe meeting and conference activities on behalf of their associations.

The updated *Guidance on Returning to Work* issued by Occupational Safety and Health Administration (OSHA), among others, provides recommendations to assist employers and workers in safely returning to work and reopening "non-essential businesses." This Guidance, located at https://www.osha.gov/Publications/OSHA4045.pdf, provides recommendations for a phased reopening process focusing on best practices for basic hygiene, social distancing, identification and isolation of sick employees, workplace controls and flexibilities, and training. The following basic infection prevention measures are the most applicable for in-person meetings and conferences:

- Promote frequent and thorough handwashing and where individuals can wash and/or where alcohol-based sanitizer containing at least 60% alcohol is located.

- Prohibit handshaking and close contact consistent with social distancing requirements.
- Prohibit workers, members or visitors from attending a meeting if they are sick, have COVID-19 symptoms or have been exposed.
- Address any mandated practices, including temperature checks or required questionnaires.
- Encourage respiratory etiquette, including coughing and sneezing, emphasizing importance of clean hands.
- Require a minimum of six feet distance between coworkers and visitors or as required by relevant state, federal or local law.
- Maintain and monitor regular housekeeping practices, including routine cleaning of surfaces and equipment, ensuring that cleaning and disinfection products are effective against COVID-19.
- Address use of face coverings or gloves if required or encouraged, setting clear expectations and address access to, availability of and disposal of such face coverings.

With the above safety precautions in mind, associations can work to negotiate with the hosting venue on behalf of the association to assure the above safety precautions are in place. Further, the association can then oversee critical communications with attendees to address and monitor these important safety precautions, providing the designated contact information for the hosting venue should issues arise. By providing valuable collaboration and handling these critical communications, the association will play a critical role in ensuring a safe environment is being provided.

Steps to minimize legal exposure

To minimize legal exposure when hosting meetings and/or conferences during the pandemic, consider the following:

- Work with hosting venues to ensure basic safety precautions are implemented.
- Communicate with members/participants the safety precautions taken and expected to be followed (on premises and/or in advance).
- Work with association leadership to define actions if expectations are not followed.
- Identify host venue contact person who can address any concerns and share that person's contact information with participants.
- Work with association leadership in considering the value of a liability waiver under circumstances, considering the likelihood of enforceability as addressed below.

As for waivers signed by employees and/or conference participants, they are unlikely to be enforceable because such waivers generally violate public policy. Often, among other reasons, the language is overbroad and the contract is neither bargained for nor entered into voluntarily as required for an enforceable contract. In a July 20, 2020 Litigation Section Blog, Attorney Erik H. Monson advises those businesses looking to the Wisconsin courts to enforce a liability waiver, “Be warned, though—you are facing an uphill battle. … To date, the Wisconsin Supreme Court has remained steadfast in playing the role of Lucy holding the football for Charlie Brown when it comes to enforcing exculpatory contracts.”[1] Despite this, associations may consider a narrowly focused waiver that only addresses COVID-19-related physical injury.

As more employees return to work and as associations consider the prospect of returning to in-person meetings and conferences, I encourage you to be proactive in guiding employees on compliance of these expectations and to do the same for the associations you serve. ■

1 Please see article at: https://www.wisbar.org/blog/Pages/default.aspx?GroupBlog=Litigation%20Section%20Blog.

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.

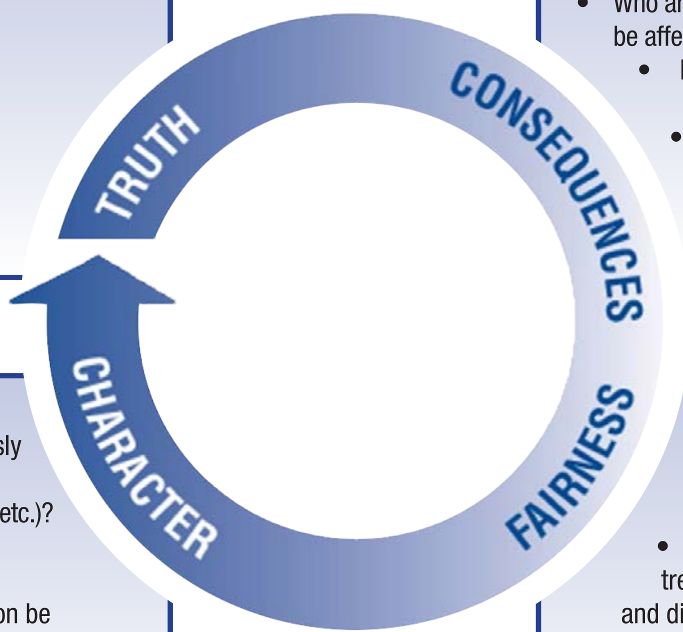
2020 Virtual Spring Forward

Thank you again to everyone who participated in the Virtual Spring Forward, June 1-2. Of course we would have preferred to gather in person, and look forward to doing just that as soon as it makes sense to do so. But with so many amazing members and the support of sponsors, we had a great virtual event! The presenters all left us with great take-aways, including the ethics presentation (framework pictured below). Our virtual social time was highlighted by a craft cocktail assembly demo, 80s and 90s music bingo and small group networkinig breakouts. ■

Four-Way Method for Ethical Decision Making

- What are the facts?
- What are the relevant laws?
- What is the institutional/ company policy?
- What are the relevant professional standards?

- What are the possible solutions to the problem?
- Who are the people most likely to be affected?
  - How are people likely to be affected?
  - Which solution will be most beneficial and/or least harmful to the people affected?



- Can the proposed actions be done virtuously (i.e., compassionately, reverently, courageously, etc.)?
- Is the proposed solution motivated by good will?
- Will the proposed solution be implemented in a way that helps build trusting relationships?

- Does the proposed solution treat people the way you would want to be treated?
- Does the proposed solution treat people with respect and dignity?
- Does the proposed solution enhance or diminish the affected people's autonomy?

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New Virtual Workshop Offered

Join WSAE for a virtual workshop: ***Tactics for Sponsor and Exhibitor Engagement (and Results!) in Challenging Times*** on Tuesday, September 15, 2020, from 9:30 am-12:30 pm CT.

Even in the best financial times, generating non-dues revenue is an essential activity for every association, and your sponsors, exhibitors and advertisers are savvy buyers with high ROI expectations. Association professionals in charge of selling and managing these relationships often have limited sales experience, and sales is not typically their favorite hat to wear. Add COVID-19 to the mix, and financial uncertainty, staff layoffs and possible deep marketing budget cuts make the sales process more difficult than ever.

This interactive workshop will help professionals fine tune their sales approach, understand the latest trends and expectations from the advertiser, sponsor and exhibitor community, and learn how active listening and being empathetic can help those relationships for the short and long term. You will walk away with checklists and other sales tools for your next pitch! ■

Limited to 25 participants. CAE Hours: 3

2020 Summit Canceled

Faced with the unprecedented impact of the coronavirus pandemic on our industry and the ongoing concern for our members, the WSAE Board of Directors made the difficult decision to cancel the Summit scheduled for October 26-27, 2020 at the Brookfield Conference Center. This action was taken out of caution in response to safety concerns, travel restrictions, and member organization's budget constraints.

Our Education Committee is working hard to develop alternative solutions so that we may still deliver an excellent lineup of educational programming and opportunities to connect our members virtually. Please watch for additional information in the coming weeks.

WSAE Chair Kathy Raab said "While we're disappointed to have to cancel the 2020 Summit the Board felt it was in the best interest of both the organization and our members. We're committed to providing quality educational opportunities through the remainder of the year and we look forward to a larger than usual turnout when we're able to meet in person again!"

If you have any questions or concerns, or if there is anything WSAE can help you or your organization with during this time, please contact us. ■

Check wsae.org under the Resources tab for information on these and other membership benefits.

Credentialing Exam Prep

WSAE members can prepare for the CAE and CMP exams through the MSAE programs at a reduced rate.

With the highest success rate in the nation, MSAE has helped more association professionals become CAEs than any other entity. We offer a process-based approach that incorporates study guides, reading comprehension questions, flashcards and practice tests. With three different courses, we have an option to fit every level of preparedness.

Real-Time Compensation Benchmarking Program

Online salary survey reports for professional, trade and service centric nonprofits

WSAE, in partnership with the Association Societies Alliance (ASA) and Dynamic Benchmarking, LLC, participates in the ASA Real-Time Compensation Benchmarking program, an online compensation survey and benchmarking platform for executives of professional, trade and service-centric associations and nonprofits. While participation in the survey will always be free, ***free access to all data reports is only offered through 2020.*** Check it out today!

Talent Search Services

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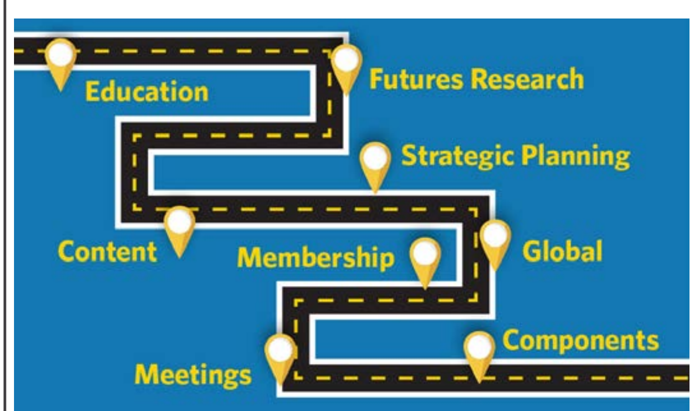
WSAE has an exciting partnership with 2019 Summit presenter Association Laboratory to offer an exclusive 25% discount to WSAE Members on industry white papers, webinars, and events.

Association Laboratory Inc.



AEM'S Dennis Slater Discusses 'Bringing America Back' to Work on ABC's *Nightline*

The Association of Equipment Manufacturers (AEM) continues to represent its members and the interests of the equipment manufacturing industry as they try to navigate the ongoing COVID-19 pandemic and try to get back to work safely.

AEM President Dennis Slater appeared on ABC's *Nightline* to discuss how manufacturers are dealing with the uncertainty they're facing during these challenging times, how they need to plan for what's next, and what the future holds for the industry and the markets it serves.

"I think what you'll see is [manufacturers] will start to react to how they can not only make their worksites safer, but also their machines more efficient," said Slater.

Slater was featured in a recurring Nightline segment called "Bringing America Back." Watch the video: https://www.aem.org/news/aems-dennis-slater-discusses-bringing-america-back-to-work-on-abcs-nightline/. ■

Caley Mutrie, CAE, IOM, Named Executive Director of the Federation of Clinical Immunology Societies

Caley Mutrie, CAE, IOM, has been named the new Executive Director of the Federation of Clinical Immunology Societies (FOCIS). Mutrie is an accomplished, results-driven association management and nonprofit professional with expertise in organizational planning and program management. She has a history of proven success working effectively with boards, committees, members, staff, chapters and governmental agencies. She has over 20 years of experience boosting membership and increasing organizational revenues. Mutrie has successfully led international, national and state trade and professional membership organizations with memberships of 114 societal and 3,500 individual members. FOCIS is managed by Association Acumen, an award-winning accredited association management firm based in Menomonee Falls. ■

AAAAI Names Rebecca Brandt, CAE, Executive Director

The American Academy of Allergy, Asthma & Immunology (AAAAI) has announced that Rebecca Brandt, CAE, has been named AAAAI Executive Director effective July 1, 2020. Brandt has previously held positions within the AAAAI, including Director of Research and Training and, most recently, Associate Executive Director, a position that she has held for almost three years. She will succeed Kay Whalen, MBA, CAE, who has served in that role since 2000. Whalen will assume the role of AAAAI Executive Director Emeritus. ■

AAEM names Missy Zagroba, CAE, Executive Director

The American Academy of Emergency Medicine (AAEM) has announced that Missy Zagroba, CAE has been named as the executive director of AAEM. Zagroba has served as the associate executive director of AAEM since April of 2019. Prior to that, she served as the executive director of the Women's Dermatologic Society, executive director of the Clinical Immunology Society and in various positions in the hospitality industry. Zagroba will assume the role of Kay Whalen, MBA CAE who has served in this role since 1996. Whalen will continue to serve AAEM as executive director emeritus/consulting partner. ■

Impact Association Management welcomes MPI WestField

Impact Association Management announced a new partnership with Meeting Professionals International (MPI) WestField. This partnership will allow MPI WestField to achieve their goals and grow their organization. MPI is the largest meeting and event industry association worldwide. Chartered in 1989, MPI WestField provides education, networking opportunities and a forum for individual success for meeting professionals located in Westchester County, New York and Fairfield County, Connecticut. ■

Wisconsin Hotel & Lodging Association announces new President, CEO Bill Elliott, CAE

The Wisconsin Hotel & Lodging Association (WH&LA) is pleased to announce William "Bill" Elliott, CAE, as their new President CEO. He has a strong background in association management, including serving over eight years as the Vice President of Operations for association management company Association Accumen and serving as the Executive Director of two national Association Acumen clients. In addition, Elliott has valuable lodging industry experience, having served as the Vice-President of Revenue Development and Operations at WH&LA for close to five years prior to his work at Association Acumen. ■

Elizabeth Schlicht, CAE, Named Executive Director of Automotive Fleet & Leasing Association

Elizabeth Schlicht, CAE, has been named the Executive Director of the Automotive Fleet & Leasing Association (AFLA). Schlicht has recently served as the organization's Associate Executive Director. AFLA is managed by Association Acumen. Schlicht succeeds Bill Elliott, CAE, who has been Executive Director since 2013.

Schlicht has been appointed as AFLA's new Executive Director after working with the organization for more than six years. "Returning to AFLA is a wonderful opportunity and I'm excited to roll up my sleeves, partnering with the board as we move forward with the organization's strategic plan for the future," she said. ■

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 there is no additional cost to this promotion - It is included as a benefit of your WSAE membership. ■

Melinda Waite named Executive Director of Minnesota Academy of Physician Assistants

Melinda Waite has been named the new Executive Director of the Minnesota Academy of Physician Assistants (MAPA). MAPA is managed by Association Acumen. Waite succeeds Elizabeth Schlicht, CAE, who has been Executive Director since 2018.

Waite has a proven track record in growing and engaging membership and educational programming for medical associations. Melinda has strong experience in creating and refining processes and procedures to strengthen the impact of programs. ■

Lynda Patterson, FASAE, CAE, to Serve as Badgers United Executive Director

AMPED Association Management announces a partnership with Badgers United that includes Lynda J. Patterson, FASAE, CAE, President and Owner of AMPED, serving as Badgers United Executive Director.

Badgers United is a 501c3 organization founded by Wisconsin residents who recognize the University of Wisconsin - Madison as one of the state's largest economic engines, providing over $15 billion in economic impact. Badgers United is data-driven, focused on ensuring that Wisconsin's flagship university remains healthy and continues to grow. ■

Destination Madison Facilitates Virtual Artisan Cheese Experience

Destination Madison is still sharing the best of Wisconsin's Capital city with meeting planners around the country. Destination Madison's convention sales and sports teams hosted an interactive, artisan cheese experience for planners, giving them a "taste of Wisconsin." The virtual experience was led by Ken Monteleone of Fromagination, and featured Wisconsin cheesemaker Andy Hatch of Uplands Cheese. ■

WBA Looks to the Future, Renovating with Eye Toward Member Engagement

The Wisconsin Bankers Association (WBA) recently completed a dramatic transformation of its headquarters. Built in 1999, the building on Madison's east side underwent a total overhaul to become a modern office space with beautiful new training space in the members-only Engagement Center.

The new building is designed to host hundreds of member bankers throughout the year in the Engagement Center and offer technology-enabled meeting rooms, a beautiful new café, and modern workstations for staff. The remodeled space also features an Honor Wall recognizing the past achievements and dedication of Wisconsin bankers.

"This renovation is about looking forward, for WBA and Wisconsin's banking industry," said WBA President and CEO Rose Oswald Poels. ■

AMPED's Donté Shannon, CAE, Selected for ASAE 2020 Class of Fellows

AMPED Association Management is excited to share that Donté P. Shannon, CAE is one of five association professionals selected for the ASAE (American Society of Association Executives) 2020 Class of Fellows.

Shannon is an account executive with AMPED and serves as the Chief Executive Officer for the Association of Equipment Management Professionals.

The ASAE Fellows program bestows this honorary recognition on fewer than 1 percent of ASAE's membership. Those who are named ASAE Fellows are called to continued service to the community, as authors, mentors, conference facilitators, and leaders.

"I am thrilled that ASAE has recognized Donté as a Fellow and I'm so proud to have him on the AMPED leadership team," said AMPED President and Owner Lynda J. Patterson, FASAE, CAE. "Donté has a remarkable passion and vision for association management that shows with every interaction - whether with staff or association leaders and members. He is truly one of a kind!" ■

WELCOME NEW MEMBERS

As of July 1, 2020

Rebecca Borzon, Executive Director, Inc
Nicole Brinkley, Executive Director, Inc
Hillary Eggebrecht, NEWH, Inc
Michael Fiez, AMPED Association Management
Tammy Foshay, Smart Association Management
Laura Gustafson, TEAM, Inc
Ruth Hackney, REALTORS® Association of South Central Wisconsin
Ann Barry Hanneman, von Briesen & Roper, s.c.
Denise Harris, Association Executives Group
Sarah Whalstrom Helgren, Executive Director, Inc
Paula Houlihan, National Speakers Association of Wisconsin
Jodi Jensema, Oshkosh Convention & Visitors Bureau
Leslie Johnson, VISIT Milwaukee
Lisa Koenecke, National Speakers Association of Wisconsin
Adam Leinen, Great Lakes Management Group
Denise Lemke, Executive Director, Inc
Laura MacIsaac, CMP, Monona Terrace Convention Center
Fran McLaughlin, NAIOP Wisconsin
Amy Nicklosovich, TEAM, Inc
Isaiah Perez, Association Acumen, LLC
Laura Pizur, Executive Director, Inc
Geoffrey Sandler, Celebrations Entertainment
Nicole Slemin, The Ingleside Hotel
Claira Stollfus, TEAM, Inc
Alisa Streets, Executive Director, Inc
Tamara Wagester, Executive Director, Inc
Peggy Williams-Smith, VISIT Milwaukee
Roger Wolkoff, National Speakers Association of Wisconsin

Navigating These Uncharted Waters Together

by Michelle Czosek, CAE

I'm going to begin with the same opening line as in the Spring 2020 issue - I hope as you read this column that you and those you love are safe and healthy.

A lot has changed since the last issue of *VantagePoint* and I don't think anyone could have predicted what was to come for our associations, our industry partners and the world around us as we started this journey in mid-March.

One of the questions we were all asking when the Spring issue went to print was whether our associations were going to be able to pull off in-person events scheduled for June and July. Here we sit in the middle of summer, and we see events canceled through the end of 2020, while the shape of those taking place in the first quarter of 2021 is yet to be determined.

We have all had to adjust to the world of virtual meetings and the term "Zoom fatigue" was recognized as real. Everyone is looking to provide educational opportunities and engage members in new ways.

While WSAE's desire to go back to large in-person meetings is strong, the health and safety of our members is our number one priority. Travel restrictions and member budget constraints were also taken into considering when the WSAE Board made the difficult decision to cancel the 2020 Summit scheduled for October. While we will not run a virtual Summit, we will be providing opportunities to learn and meet through the end of the year and those sessions will help answer your questions about engaging members, planning for the future financially, re-imagining your sponsor and advertising sales for a virtual world, and more.

The 2020 Executive Exchange was held in person on July 19 and 20 at The Osthoff Resort. The event is specifically for association CEOs and always has limited attendance, so we thought this was a safe option for an in-person meeting. A dozen attendees participated in sessions on leading through crisis, the new world of live events, and available options in the virtual world. Plenty of time was also offered to discuss topics of interest with their peers.

Did the event look different? Of course. The Osthoff Resort and Marin Medema were wonderful partners when it came to making our attendees feel comfortable. Attendees were seated one person per six-foot table, a hand sanitizer and mask station was placed at the entrance to the room, meals were plated with some items such as muffins/fruit cups covered, metal name badges (donated by Name Badge Productions) had a *six feet for safety* reminder and came individually packaged, and the standard hand shake or hug greeting was scrapped.

While I was apprehensive about being in a public place, in a room with a larger group than I've seen in months, I felt completely safe. I think everyone thrived on being able to interact with our peers and share stories and smiles that, while fine on Zoom, are much better in person!

As always, please don't hesitate to reach out to me or any WSAE Board member if you have questions, ideas for resources that we can provide to our community, or if you just need to talk to someone that's experiencing the same issues and challenges you are.

I hope that everyone will take care of each other as we continue to navigate these waters. While some people thrive in our new environment, there are others who have lost their jobs, are in their home alone, have lost a loved one, or struggle with anxiety over what is happening around us.

In the words of one of my favorite authors, Bob Goff, "The most beautiful scenery in the world is when our friends come into view." Remember that not everyone experiences our world in the same way that you do, so be a friend to someone who may need an extra dose of kindness this week. ■

Michelle

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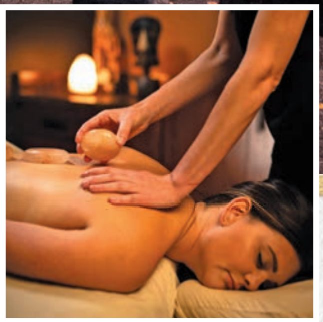

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