VANTAGEPOINT

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Wisconsin Society of Association Executives
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LIVE! @ Lambeau
July 12-13, 2022

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Time for a Coming-out Party at Lambeau!

by Jerry Deschane, IOM CAE

I'm *done* with video meetings, remote work and supply chain disruptions. Long live the CDC, gimme my booster shot and let's get on with *life*! Who's with me?!

Okay, calm down, Jerry. Deep breaths. Happy place; happy place; happy place…

We learned a lot from two years of remote working. Many of us will continue to use video meetings and webinars as an important add-on to our suite of information delivery tools. But there's still nothing better than real, live, one-on-one, in-person networking. It will be great to get back to that. My organization, like yours, has now begun in-person events again in earnest, taking reasonable health and safety precautions, but welcoming our members back with open arms (or at least with enthusiastic elbow-bumps).

YOUR ASSOCIATION MANAGEMENT HOME, WSAE, IS PREPARING TO WELCOME YOU BACK IN THE BEST POSSIBLE STYLE: GREEN AND GOLD. WSAE HAS JIMMIED THE CALENDAR JUST A LITTLE BIT TO PUT OUR ANNUAL SPRING EVENT SMACK DAB IN THE SUMMER SUNSHINE. WE'VE ALSO PICKED ONE OF THE HOTTEST MEETING VENUES IN WISCONSIN: LAMBEAU FIELD!

The pandemic is not 100% behind us, but the scientists and the doctors have given us the go-ahead to spend some time in the sunshine. So let's do that.

Your association management home, WSAE, is preparing to welcome you back in the best possible style: green and gold. WSAE has jimmied the calendar just a little bit to put our annual spring event smack dab in the summer sunshine. We've also picked one of the hottest meeting venues in Wisconsin: Lambeau Field! Join us in Green Bay from July 12-13 for six hours of continuing education and even more hours of networking.

Can you imagine having a conversation without seeing my friend go into freeze-frame mode, or having that annoying woman tell me (for the 439th time), "Jerry, you're muted?" Well, mute *this*, Pandemic! It's time to share knowledge the old-fashioned way... over old fashioneds!

I hope I will see you there.

And while you're filling in your networking calendar, don't miss these three: the Annual CEO Retreat will take place in August; there will be a first-ever and most-amazing Women's Executive Forum September 21; and save the date for the annual WSAE Summit, now November 30 through December 1 (note the new time frame) in Madison. ■

UPCOMING

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Advancing Key DEI Considerations in Employment Practices

"Ask the Expert" legal feature

by Ann Barry Hanneman

Q: How can employers go about incorporating key Diversity, Equity and Inclusion (DEI) considerations in employment practices and policies?

A: As I speak to many employers on the topic of diversity, equity and inclusion (DEI), it is clear that every employer is at a different stage and DEI is different for every organization. If you are an employer initially considering the value of DEI to your organization and wondering how to get started, or if you are an employer looking to reset DEI initiatives, there are steps that can be implemented so that your organization can advance beneficial DEI principles.

GIVEN THE GROWING TALENT SHORTAGE AND CHANGING POPULATIONS, EMPLOYERS RECOGNIZE THAT EMPLOYEES WILL WORK ALONGSIDE DIVERSE CO-WORKERS AND PARTNERS AND WILL PROVIDE SERVICES TO DIVERSE CLIENTS. BEING SUCCESSFUL REQUIRES THAT ALL EMPLOYEES ARE ABLE TO THRIVE IN SUCH AN ENVIRONMENT.

Recognize the business case

DEI has been in the forefront now for a few years and the impact of the pandemic and the current war for talent have further underscored the importance of providing a workplace culture that is diverse, inclusive and equitable to all employees. As studies have shown, robust DEI efforts have translated into enhanced profitability stemming from the advantages of collective decision-making by diverse leaders and employees. While those rewards are not instantaneous and require intentional and strategic steps to achieve, the benefit of attracting and engaging employees cannot be overstated. A recent statement by Melissa Thompson, global head of talent acquisition at Ford Motor Company, sums it up. "Winning the competition for talent will be more about culture and the people and not just about the money," she said in the Society for Human Resource Management web article *Employers are Responding to Job Candidates Changing Expectations*, dated January 22, 2022.

Understand DEI and why it matters

While diversity in the employment context generally refers to the unique differences that all employees bring to the workplace, inclusivity focuses on the inclusion and engagement in the workplace. The two go hand-in-hand, and one without the other, will serve to defeat the effort. Given the growing talent shortage and changing populations, employers recognize that employees will work alongside diverse co-workers and partners and will provide services to diverse clients. Being successful requires that all employees are able to thrive in such an environment.

Use policies and training efforts to advance DEI in the workplace

Depending upon current policies, the following efforts will support the DEI commitment.

- Striving to create a respectful workplace, reinforcing that disrespectful and harassing behavior will not be tolerated.
- Advancing guiding principles to foster inclusivity, such as respecting others, being fair and honest, and doing what is right.

- Communicating the commitment to equal employment opportunities, reinforcing that all employment decisions will be made without regard to any protected characteristic (including race, religious creed, age, sex, sexual orientation, national origin, ancestry, citizenship status, religion, marital status, disability or other legally protected characteristics).
- Reinforcing the commitment to a harassment-free workplace, emphasizing that any acts of harassment by employees, supervisors, vendors, clients and any third party, and any conduct that may create an intimidating, offensive or hostile work environment will not be tolerated.
- Emphasizing the commitment to non-retaliation, making clear that any employee who brings forward any concerns or complaints or participates in any investigation of actions that may violate the company's commitments to maintaining an environment free of harassing or discriminating behavior will not experience any retaliatory actions.
- Assuring that all employees know that an open-door policy is in place to address any concerns about the workplace, and that any such complaints and concerns will be addressed, without retribution.

As part of advancing these DEI efforts through policy implementation, employers must provide training and educational opportunities to both managerial and leadership members as well as to all employees. In all organizations, top leadership drives the workplace culture, and it is important that top leadership make a strong and consistent statement reflecting the commitment to a diverse, inclusive and equitable workplace. Furthermore, holding managers and supervisors accountable for supporting these DEI principles will be critical to the success of an employer's DEI commitment. In addition, managers and supervisors must be provided with training on respect, cultural tolerance, ethical positions and potential legal exposure.

Put other efforts to advance DEI in place

Employers can also consider devoting resources to expanding hiring efforts that are specifically focused on recruiting diverse candidates for employment. Alternative recruitment approaches can open other pipelines to diverse candidates that may include contacting other hiring sources or partnering with a local organization that provides employment opportunities to a diverse population. Tapping local chambers of commerce, nonprofit organizations or other community partners may provide valuable avenues for recruitment.

Employers may also consider creating employee resource groups or affinity networks whose purpose is to promote the company's DEI efforts, allowing for networking and education about a diverse population. Other considerations also include encouraging mentorships that focus on advancing opportunities for professional and personal development. Moreover, depending upon size and available resources, empathy experiences can be cultivated to provide an appreciation of diverse cultural backgrounds within the company and in the existing community.

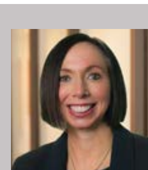
Monitor achievement

Like any long-term strategic effort, employers should periodically assess achievement. Depending upon the depth and scope of an individual DEI program, an employer should evaluate progress on a periodic basis that will include an assessment of the following: policy development and integration; assessment of cultural, equity and diversity objectives; business value; supporting programs that target inclusion and engagement; and accountability in leadership as it relates to DEI principles. Employee surveys and discussion groups may provide valuable insight and perspective.

When assessing success, it is important to set realistic objectives and stay the course. A workplace environment will not change overnight. However, continued and sustained focus on the vision and business objectives of the DEI program will serve to guide the process. If one program, concept or idea is not embraced, then reassess to find an alternative approach. There are many creative ways to embrace DEI ideals that will be meaningful to your employees, but it may take time for your organization to hit it out of the park. It will be worth the effort.

I hope this provides you with useful legal and practical considerations when implementing and incorporating key DEI considerations in employment practices and policies. ■

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



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Board & Volunteer Orientation: Equip Your Leaders for Success

by Elizabeth Schlicht, CAE

We all hope to be a member of, or work with, a truly effective and impactful board that steers the association towards a path of success. To enable your board to have the insights, impact and overall tools needed to reach that goal, one of the crucial first steps is to provide an informative and actionable board orientation. You wouldn't hire someone and expect them to deliver outstanding results with no information or guidance, so why would you treat your board members any differently?

THE ULTIMATE GOAL IS A WELL-INFORMED NETWORK OF LEADERS – FROM YOUR BOARD MEMBERS TO YOUR COMMITTEE CHAIRS AND TO YOUR NEWEST MEMBER SERVING ON AN AD HOC WORKGROUP. BY EQUIPPING ALL YOUR LEADERS WITH THE KNOWLEDGE AND TOOLSETS REQUIRED TO DO THEIR BEST AND MOST INSIGHTFUL WORK FROM THE START, YOU SET YOUR ENTIRE ASSOCIATION UP FOR SUCCESS.

Cover the basics

A strong board orientation, at minimum, requires a few crucial elements: who you are as an organization, what governs your decisions, and the current outlined path. These items can provide a strong base, though we'd encourage you to dedicate enough time to include discussions on specific roles, responsibilities and insights that make your organization unique.

Who you are as an organization. It's helpful to start with who your organization is – your mission and vision statements of course, but also, who are your members and what makes them unique? What are the demographics you're tracking for your key stakeholders? What are your key engagement factors for your membership, industry and circle of influence? In order to equip your board to make strong, informed decisions, these are key elements of your organizational identity they must have insights into. Include actual numbers and trends as much as possible. Metrics to consider might be membership numbers such as new, renewing or lapsed members, the corresponding retention rates, member demographics, sponsorship income, conference attendee figures or abstract submission numbers. Include the areas that reflect the core initiatives and mission-driven programs of your organization in a way that's easily digestible, such as using graphs for trends or focused key metrics.

What governs your decisions. With this base knowledge, you should move into other factors that govern how you make decisions. These include your bylaws and policies, but also applicable laws for the country and/or region where your organization operates. What liability do those laws open up for your organization and your board members? What steps must be taken to ensure compliance?

And you can take it one step further by describing how your governing documents outline the designation of roles and responsibilities for the various board positions and committees. Be sure to include board privacy, ethics, anti-trust, conflict of interest and whistleblower policies. This would also include a review of the three legal duties of a board – duties of care, loyalty and obedience – all explained in language that clearly resonates with your board members.

The current outlined path. With the solid footing of who you are and how you operate, you must also prepare your board for the outlined path in place. What is your current strategic plan? Walk your board through the plan and current status of outlined goals. This will provide the context needed to review, deliberate and properly weigh decisions and discussions. And this will empower your board to actively engage from the start.

Include additional context, if possible

If you are in a position to have a focused orientation meeting, or to include a strong agenda addition, consider enhancing these minimum needs with a few additional items to bring further depth and breadth to the board's preparedness.

Board job description. A strong contender for inclusion would be a review of your board job description. While you should communicate this with your candidates in advance of the election, a quick refresher is a great addition to help focus and keep those stated priorities in mind as they start their work as a new board member. For a board which leverages its directors to be engaged in more hands-on work, consider including a break-down on what work or oversight is owned by the board, the committees and the staff. This helps further define the job description and scope for your board members while also providing insight into the overall organizational structure.

Legal duty case study exercises. A strong second suggestion for enhancing your orientation would be to include modified case study exercises focused on the legal duties of a board. If legalese is not the first language for your leaders, taking the time to craft some short discussion-generating case studies in terms and situations that align with their industry helps make these more easily understood and applicable. This is also a great place to have your current board leadership ask a few open-ended questions to generate discussions between both new and returning members.

Member benefits and programming. Shifting the focus from governance to oversight, many new board members may appreciate a high-level overview of the member benefits and programming your organization provides. While we'd love all our members to be intimately aware of all the association offers, often there are programs that members aren't aware of, for whatever reason. This review helps ensure your board is aware of the full scope of the work your association does which aids in informing their oversight responsibilities. Consider a summary of recent feedback on your flagship benefits or programs, or of your recent member survey results. This helps calibrate the programmatic work with what your members or key stakeholders perceive as the most important, which is crucial for a high-impact board to understand.

Time to process. Overall, it's vital you bear in mind the importance of balancing information with time and space for questions and discussion on all items included on your agenda. You don't want your board to leave your orientation with more questions than when they started, and planning time to address these questions is crucial to help your leaders feel well-informed and supported as the governance term begins.

Consider meeting format

When planning your orientation, bear in mind the logistical allowances and restrictions that the means of meeting present. How you meet should be considered when crafting this experience to ensure maximum participation and engagement. In-person, hybrid and virtual are all capable of hosting a strong orientation, but also present unique interaction parameters.

In-person meetings. In-person meetings have an energy that is hard to replicate in any other format. This energy can enhance your meeting but can also contribute to side conversations or other distractions which split the focus of your board, ultimately undermining the impact of the orientation itself. Consider the individuals and relationships in the room and use table tents to assign spots. This can help in a couple of ways: 1) It eases uncertainty for new members

who might not know who everyone is in the room, and 2) It can encourage conversations to be fully inclusive, as opposed to facilitating side conversations. Space-allowing, use an open room configuration to allow for eye contact between all participants, which aids in conversation.

Virtual meetings. A fully-virtual meeting often removes the side conversation concerns, but now you are competing with computer or phone notifications that attendees see popping up on their screen. Consider asking your board members to prepare to be on-camera for the full call and to minimize or fully close out of other programs and documents. The use of a guiding slide deck or other document to share on screen creates a unified focal point. This keeps the conversation supported and on topic, and also helps meeting participants who may feel self-conscious being on camera for a prolonged period relax.

Hybrid meetings. And of course, the hybrid model combines the hurdles and tips for both virtual and in-person. Key for success is bridging the energy from in-person with the visual structure of virtual. Make sure all in-person attendees are visible on the camera feed and are able to be equally heard in terms of both volume and clarity. And ensure the visual support seen by your online participants is also clear for those in-person. Side conversations from in-person attendees can be even more detrimental for a hybrid meeting as they muddle streamed audio, making the meeting harder for the remote participants to follow. If space allows, table tents can provide visual cues for remote participants and serve as a reminder to those in the room that the virtual participants are there and provide a prompt to pause and check in with the remote participants during discussions to give them the auditory space to contribute to the conversation.

A highly-successful orientation is about the content, discussion and accessibility for your board. What works best for one board may not work well for another – and what works best one year may not be the best option another year. Keep the need for clear communication avenues in mind and you can be successful no matter how the logistics of your meeting are being formatted.

Orientation – It's not just for board members

Thinking beyond your board, do you have other volunteers charged with doing the work of the association? This could be committee chairs, committee members, task forces or other ad hoc groups formed to support the programs or initiatives of the association. While not requiring information in the same content or scope as your board, they would still benefit from an orientation at the onset of their commitment to your association. Consider being a brand-new member eager to volunteer and contribute to your industry's association. And you are placed on a committee. What can you provide to set them up for success?

Group charters and policies. A starting point would be relevant charters or policies governing the work of the committee, chair or other group being given the orientation. Ensuring your volunteers are aware of and understand the governing documents and policies that impact their work is imperative to ensuring they are well-equipped to succeed in their roles. Including this information helps ensure they know what work they are charged with, what their specific role is, and how that relates to others working on these initiatives or programs.

Strategic initiatives impacted by the group. Also consider your current strategic plan and whether any of the current initiatives or goals are being driven by the work of this group. Discuss these initiatives, where you are in the process and any next steps, goals or milestones. Allow space for questions and conversation on these items, similar to how you conducted your board orientation.

Relevant documents. Some other items to consider, if time allows, include any budgets they have oversight on, recent feedback on programs or initiatives they oversee and any documents, tracking sheets or dashboards function that they will use during their term.

The ultimate goal is a well-informed network of leaders – from your board members to your committee chairs and to your newest member serving on an ad hoc workgroup. By equipping all your leaders with the knowledge and toolsets required to do their best and most insightful work from the start, you set your entire association up for success. ■

Elizabeth Schlicht, CAE, is an Executive Director at Association Acumen, LLC. Elizebeth is a WSAE member.


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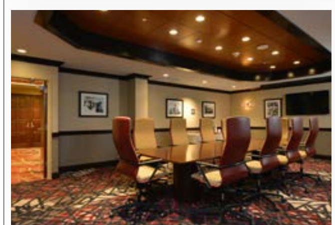


Get to Know: Barb Gamez, MS

Senior Marketing Manager
American Society of Gene and Cell Therapy

I ENJOY ANSWERING QUESTIONS ABOUT WHAT'S WORKED FOR ME, AND SHARING IDEAS AND APPROACHES FOR INTEGRATED, CROSS-CHANNEL MARKETING CAMPAIGNS.

How did you end up working in Associations?
One of my accounts at a Milwaukee advertising agency where I used to work was in an industry and part of an association which happened to be hiring for a marketing manager, so I applied because I had knowledge of that industry. That was nearly 20 years ago, and I've been in an association marketing role ever since.

What is your biggest career highlight to date?
One career highlight that stands out for me was a new member referral campaign that I inherited and retooled, which resulted in a 67% increase in member referrals, a 20% increase in trial memberships and a 10% increase in free to paid membership conversions over the prior year. A large part of the success was creating an integrated, multi-channel marketing campaign that increased the frequency and number of messages, made it quicker and easier for current members to refer new members, and provided pre-written messages members could personalize and send.

What do you think is the biggest challenge associations currently face?
One of the biggest challenges for associations today is resonating with and engaging with a multi-generational membership. Knowing what the different segments of your membership are, what those segments need, how they want it delivered and then communicating that across a variety of channels is necessary today. One size doesn't fit all and offering different membership types may not address every segment you might have. It can seem overwhelming. However, segmenting and targeting members is worth the investment for increased engagement that can lead to increased member retention.

What is something people can ask you about at a future WSAE event?
I'm always happy to talk about association marketing! I enjoy answering questions about what's worked for me, and sharing ideas and approaches for integrated, cross-channel marketing campaigns.

Outside of the work stuff, please share what makes you happy.
What makes me happy is adding to my collection of Wonder Woman memorabilia. It started with the DVD set of the entire television series starring Lynda Carter, which I loved to watch when I was younger. One of my favorite items in the collection is the limited edition Wonder Woman Build-A-Bear®! ■

Starting From Square One

The endless possibilities presented by the re-emergence of the QR code

Scrunchies, biker shorts and QR codes – all things we never thought would see a resurgence, yet here they are! Rewind to a few years back, and QR codes had a less-than-stellar reception. The average cellphone camera was not equipped to capture them easily, scan rates were generally low and use cases were either too niche for the average user or resulted in dead links.

Then 2020 happened. We were worried about every cough, dousing our groceries with Lysol and refusing to touch public surfaces. QR codes became an excellent way for patrons to get information quickly. Consumers became increasingly comfortable with the new drill, and phone cameras became increasingly more compatible. Now, everyone including your tech-challenged second cousin knows how to scan a QR code.

Besides being an easy way for consumers to get rapid and relevant reports – hence their lesser-known full name, *quick response codes* – QR codes have become an unexpectedly-brilliant tool for marketers who tap their newfangled power in 2022. QR codes:

1. Create a bridge between the digital and physical world
2. Are an excellent way to track and boost the success of direct mail
3. Require less work for the user because there is no URL typing required
4. Assist remarkably in lead generation
5. Are endlessly versatile

OH, THE POSSIBILITIES! QR CODES ARE OFTEN USED IN STORES, AT TRADE SHOWS AND ON MAILERS TO CONNECT CONSUMERS TO DESTINATIONS LIKE LANDING PAGES, DONATION PORTALS, EVENT INVITES, QUESTIONNAIRES AND THE ALL-TIME FAVORITE – FREE STUFF. THEY CAN BENEFIT BUSINESSES BY COLLECTING DATA FROM THE CURIOUS CUSTOMERS WHO SCAN THEM.

Oh, the possibilities! QR codes are often used in stores, at trade shows and on mailers to connect consumers to destinations like landing pages, donation portals, event invites, questionnaires and the all-time favorite – free stuff. They can benefit businesses by collecting data from the curious customers who scan them. Each scan reveals who is interacting with the brand, and provides promising new leads.

But the uses for our four-sided friends don't have to be so, well, square. Number five on our list above got us thinking about the creative ways businesses could use QR codes. As usual, we took that ball and ran with it right up to the edge of weird.

So while you start pondering the possibilities for your company's uses for QR codes, enjoy the finalists on our short list of creative, yet highly unlikely, QR applications:

The "I want to believe" QR code

In theory, QR codes can be applied to any flat surface. And we do mean any. In this case, a corn field. While perhaps more of a crop square than a circle, a larger-than-life QR code stamped into your field could drive croploads of curious customers to the website of say, an agriculture equipment company eager to showcase their new product line. While only scannable from the sky, a QR code of this magnitude would likely harvest enough publicity to drive traffic to your website with or without a plane. While you're at it, why not go for the Guinness World Record for largest QR code?

The teleportation QR code

A serene alpine lake in Italy? A bustling market in Morocco? Transport users to a live feed of their dream destination! This

QR code could come in handy for travel agencies or credit card companies. A live feed could also drive appeals campaigns for, say, a wildlife conservancy, sending donors to a trail cam of an eagle nest or a big cat monitoring project.

The wearable QR code

Slapping your company logo on branded swag is already highly effective and pocket-friendly. Why not take that notion a step further and make that wearable marketing interactive? Put a QR code on your company polo to drive fellow golfers to your website in between swings. Or, skip the itchy tags in your clothing designs and create a square that links to iconic, Gen Z-approved digital washing instructions. Laundry day has never felt so from-the-future.

The permanent QR code

Conspiracy theorists have been rumbling about the government making on-body human tracking a requirement for years. While we prefer to ignore these darker notions, it is actually possible to get a functional QR code permanently scribed on one's self. Just imagine if someone asked you for a business card, and you had them scan your wrist tattoo with a smartphone to access your personal website? Your business would likely not be forgotten.

The portfolio QR code

The last one on our list isn't that weird, but it is a cool way to promote your skills and showcase your work that you may not have considered before. Ideal for college applicants or professionals applying for jobs, attaching your own custom QR code to the top of your resume could be what you need to set yourself apart from the competition. If you'd like to create a little more mystery, consider a business card with nothing on it but a QR code. Imagine how many more scans you'd get from curious recipients!

QR codes are an affordable way to boost trackability and lead generation for direct mail campaigns. While we wouldn't ultimately suggest getting a QR code tattooed across your forehead, we do hope this list inspires some creative ideas of your own. ■

This article is reprinted from the Thysse company blog. Thysse's **JJ Giese** is a WSAE member. Contact him at jj@thysse.com to explore options for your next marketing campaign.

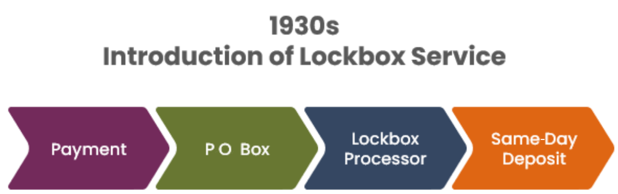
The Great Lockbox Revival and How **Businesses Benefit**

by Kim Preston

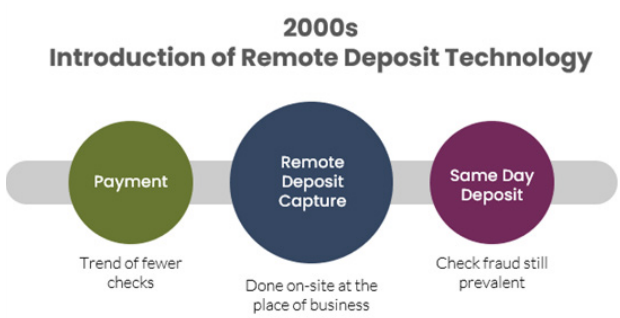
Bank lockbox services reportedly trace their roots to the 1930s when banks wanted to collect debt that businesses owed them. Bank representatives were given access to collect receivables from the businesses' post office boxes and processed the payments from there. Lockbox check collection was born.

The evolution of lockbox services

Also called remittance processing, modern-day lockbox services offer check collection and processing in an off-site, controlled environment. In a basic explanation, an orgaization asks its customers to address payments to a PO Box that goes straight to the lockbox processor. Checks are collected, scanned and deposited the same day, and a report is transmitted with the details of the deposit. Or, the information can be integrated automatically into accounting software.



Over the decades, as payment technology and banking services changed, bank lockbox services gradually fell out of fashion, especially among orgaizations with lower check volumes. As scanning technology improved and became affordable, Remote Deposit Capture gained popularity in the 2000s, allowing orgaizations to scan and deposit checks at their office. For business-to-business companies, Remote Deposit Capture brought more efficiency to their operations as no one had to make trips to the bank to deposit checks.



You can see where this is going. Remote Deposit Capture works fairly well when staff are working onsite, in an office. It still provides an environment where check fraud can happen – such as checks being stolen and forged.

Pandemic revival of lockbox services

The COVID-19 pandemic turned many daily life activities on their head, and also affected orgaization operations and payables. As many workers shifted home, at least for some time, no staff was on site to scan checks using Remote Deposit Capture. Checks sat in mailboxes while orgaizations tried to figure out new processes. Subsequently, leaders looking for uninterrupted payment deposit while employees were either out sick or working flexibly at home, turned to lockbox services.

Along with other banking services, lockbox also modernized. What was once a paper-intensive banking solution is now digital, more efficient and easier to navigate. Clients can log in and see everything electronically, which provides greater benefit for orgaizations.

Benefits of lockbox for orgaizations

Here are just a few benfits that orgaizations experience from using lockbox services:

1. **Greater efficiency.** Employees no longer need to pick up checks from anywhere – or scan them or drive them – to make a deposit. Automating this part of operations frees up employees to work on new initiatives or take on training for another role in your organization. With the tight labor market plaguing businesses for the past several years, accomplishing more while not adding staff is an efficiency win.

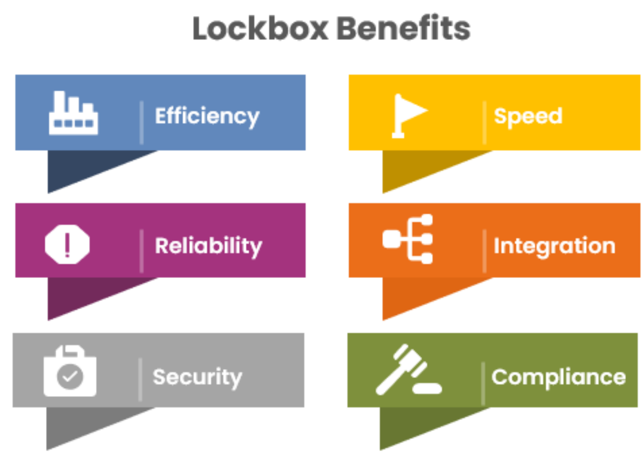
2. **Reliable continuity.** Lockbox services are highly reliable and predictable, as you receive notice of deposits the same time every business day. Compare that to employees handling multiple duties who often get pulled away from depositing checks. Lockbox services are automated and consistent.
3. **Tighter security.** Checks sent to a PO Box and dealt with by a professional lockbox processor are infinitely more secure than checks that sit in mailboxes, on counters, in desks or on tables. Checks are still the top B2B payment method and also the top payment method impacted by fraud. While the pandemic shifted more orgaizations than ever to electronic payment, checks – and check fraud – seem here to stay. Removing your employees and your office from your main source of income may seem counter intuitive. We like to trust our employees. We feel our offices are safe. Unfortunately, it's not uncommon for orgaizations to experience forged or stolen checks. Lockbox services remove that scenario.

EMPLOYEES NO LONGER NEED TO PICK UP CHECKS FROM ANYWHERE – OR SCAN THEM OR DRIVE THEM – TO MAKE A DEPOSIT. AUTOMATING THIS PART OF THE BUSINESS FREES UP EMPLOYEES TO WORK ON NEW INITIATIVES OR TAKE ON TRAINING FOR ANOTHER ROLE IN YOUR ORGANIZATION.

4. **Faster payments.** Your check receivables sent by your customers to a PO Box arrive faster and are deposited more quickly than those delivered by a carrier, allowing you to access the funds quickly and predictably.
5. **Seamless integration.** With a customization file, the daily lockbox report can integrate right into your orgaization's accounting software, so you don't have to even enter the lockbox payments.
6. **HIPAA compliant.** For health care organizations, such as hospitals, specialty HIPPA-compliant medical Lockbox services ensure checks and data are processed under strictly-regulated conditions.

Lockbox services case studies

In April 2020, a manufacturing company swiftly made the move to lockbox for check receivables. With office staff working remotely, checks hadn't been deposited on a timely basis, which impacted cash flow and left the orgaization at a much greater risk of experiencing a check fraud incident. Going forward, the company wanted to continue to offer its office staff flexibility to work remotely, and benefit from the reduced cost of less office space. They quickly implemented lockbox services and found other benefits, as well.



"Lockbox services have allowed us to continue to provide flexibility for our office staff, which allows us to retain these highly-experienced people. Now we also don't worry about who is picking up or scanning checks and how quickly we can get the funds deposited into our account." – Client

In another example, a nonprofit organization, while benefiting from a consumer transition to digital payments, also still receives a high volume of check donations. The nonprofit relies on its generous donors to operate, and it has a slim staff that takes on multiple roles. They don't have the operating budget to hire more people and need to automate office processes as much as possible. This organization likes the security aspect of lockbox services, but also feels the efficiency of lockbox is more than worth it.

"We would need to hire another person just to handle donations if it wasn't for lockbox services. We've become even more grateful during the COVID-19 pandemic that we have lockbox services so the processing of donations wasn't interrupted. It has been worth it to us." — Client ■

Kim Preston is Director of Treasury Management, Southeast Wisconsin, at First Business Bank, a WSAE member and annual sponsor. Kim can help you with any questions you have regarding Treasury Management. Please contact kpreston@firstbusiness.bank at First Business Bank to get the process started.
Member FDIC

Protect Your Association Amid Concerns of Russian Cyberattacks

by Rasheeda Childress

The government has advised businesses to prepare for possible Russian cyberattacks in retaliation for U.S. sanctions over its invasion of Ukraine. Since associations are also vulnerable to cyberattacks, two experts explained what types of attacks might be on the horizon, how to tighten up your cybersecurity efforts immediately, and what to do if your group finds itself the victim of a cybercrime.

IMAGINE YOU LOSE YOUR MEMBERSHIP DATABASE, YOU LOSE YOUR FINANCIAL RECORDS, AND YOU HAVE NO BACKUPS OF ANYTHING. HOW DO YOU EVEN CONTINUE AS AN ORGANIZATION?
-JONATHAN ROY, DESIGNDATA

Most common attacks

One area of concern is ransomware attacks, where a hacker breaks into your system, encrypts all your data and demands a ransom to get it back.

"They say, 'If you don't pay me $150,000 in the next three days in Bitcoin, I'm going to make public all that data I stole,'" said Jonathan Roy, director of security and compliance at designDATA. "Your reputation will be ruined. Your members won't want to renew. That's a scary proposition."

Another type of attack seeks access to your systems. This has two purposes: to steal money or information that can be used for other access.

James Stanger, CompTIA's chief technology evangelist, said associations that interface with government servers because of contracts they have or those with government personnel data might be targeted.

"You're only as strong as your weakest link," Stanger said. "[Hackers] may say, 'We can hack into a government agency through any of their partnerships.' Or, maybe they can get a hold of a seemingly innocuous database that includes member data for high-level government workers. All associations need to evaluate their most sensitive and important data and think widely of its impact."

For organizations with no links to the government, hackers may try to gain credential information for staff to steal money. "Let's say I'm the chief financial officer, and they compromise my company email address," Roy said. "Maybe they'll use my email to do a password reset on the [association] bank account. Then they can log in, issue themselves new lines of credit, make transactions, etc."

Another type of attack is a distributed denial of service (DDOS) attack, where hackers use association servers to disrupt internet traffic. "We've seen this where companies had no idea that they were participants in a DDOS attack, because they had misconfigured their routers or hadn't taken certain steps," Stanger said.

Steps to take now

Avoiding these attacks starts with protecting one of the easiest routes of entry: staff error. Ensure staff is trained on security measures – like not opening unknown email attachments.

"End-user education is really important," Stanger said. "I've seen in recent days, where organizations sent emails that said, 'Due to the issues going on, remember your end-user training. Here's another link that you can bone up on. And at the end of the day, reboot your PC.'" Stanger noted that it's important to reboot so that automatic updates are installed.

Another step to take is to implement two-factor authentication, which requires more than just a password to access systems.

It's also important for associations to backup data in a way that the backups can't be accessed, even if a hacker successfully infiltrates your system. This is crucial in the event of a ransomware attack. "If they encrypt your data and destroy your backups, you're sunk," Roy said. "Imagine you lose your membership database, you lose your financial records, and you have no backups of anything. How do you even continue as an organization?"

In addition, associations should share information related to cyberattacks. "The idea is that these organizations can share information about attacks that are coming at them, so that they can all make sure that they are protecting each other," Stanger said. For example, given growing concerns around cyberattacks, CompTIA has a sharing forum it has opened to the public.

Finally, if an association has a cyber insurance policy, both Roy and Stanger say now is the time to go through it and make sure the association is doing all the compliance pieces – that will provide a good checklist of protections that will give your organization a better chance to avoid a bad outcome.

"More than likely, you will have raised the bar enough that a potential attacker will say, 'I'll go after someone else who doesn't have their ducks in a row,'" Stanger said.

What to do if you're attacked

If your association is a victim of a cyberattack, it's important to have a plan.

"I suggest you have a written plan," Roy said. "Practice that incident response plan so you will be much more thoroughly prepared."

Some questions to answer in your plan: Under what conditions would you pay a ransom? Who in law enforcement do you contact? What is the general policy on telling your members about breaches?

Keep in mind that many states have their own laws detailing what must happen after a data breach. For example, you might need to contact the attorneys general of states your members reside in because that's what their state law requires.

If hackers are demanding a ransom, Roy said to remember that paying the ransom won't always get your data back. "Some cyber criminals are technically not very proficient," Roy said. "They know how to encrypt your data and they know how to accept payment, but they don't know how to unencrypt it. So, you pay the money and then get nothing back."

Cyber criminals also aren't trustworthy, so some will take the money and then, believing they've found a golden goose, demand a second or third payment. That's why having a good data backup strategy in place is crucial, Roy said, so you can avoid paying.

Finally, Stanger notes that you need alternative ways to communicate, depending on what systems were compromised. "If you got hacked via email, be ready [to communicate with staff via] a phone call or a text, something that is a different form of communication," Stanger said. "Have a plan B." ■

Rasheeda Childress is a Senior Editor at ASAE's *Associations Now*.

Congratulations to Recent CAE Class

The Winter 2022 class of CAEs successfully completed the CAE examination administered worldwide December 1-14, 2021. All three from Wisconsin are WSAE members. They will be honored, along with the Summer class of CAEs, during the 2022 ASAE Annual Meeting & Exposition in Nashville, Tennessee, August 20-23. ■

Erica Halmstad, MS, CAE

Assistant Director of Communications
Executive Director Inc.

What does achieving your CAE mean to you?
In today's hyper-competitive world, I knew achieving the CAE credential was necessary for marketability in my field. I took the MSAE Concentrated Prep Course and found that not only the CAE exam itself, but the preparation for it, to be a true test of my grit and determination. Earning my CAE helped me overcome previous feelings of self-doubt as the credentials gave me enhanced credibility with my peers, unique sector-knowledge, and clarity of the most crucial aspects of association management. Confidence in my knowledge, skills, and abilities is only something that earning the CAE was able to solidify.

Susan Lathrop, CAE

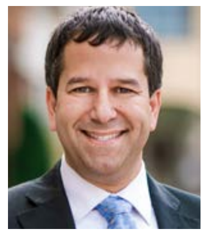
Education Manager
Executive Director, Inc.

What advice do you have for a colleague considering studying for their CAE?
Make sure you are in the right mindset and have the time dedication to pursue it. If you have a spouse/partner/family, speak with them about the endeavor and ensure you'll have their support with household/family/pet tasks and commitments so you have the study time you need.

Register for and actively participate in a prep-course. You'll get a better perspective of the materials and the exam, and a better perspective of your learning style.

Last, consider joining or forming a study group. I found it beneficial and motivating to connect with a small, informal group of people who are going through the same experience as me.

Tony Veroeven, CAE



Director of Sales and Marketing
AMPED Association Management

Why did you decide to pursue your CAE?
I attended my first ASAE: The Center for Association Leadership Conference in 2009 and was inspired by those who walked the stage during the CAE ceremony. I understood what it meant and how much of an accomplishment it was. As I walk across the stage at the 2022 ASAE Annual Meeting, I hope there will be other association professionals in the crowd who will think, "Hey, I want to do that, too."

What does achieving your CAE mean to you?
The knowledge one gains in the studying process is unbelievably useful in real (association) life. Not to mention being able to add "CAE" at the end of my name is a significant milestone for me personally and professionally.

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

1. Find a mentor, join a CAE Prep Course and/or a study group in the Spring or Fall before your exam. Start early; there's a lot of material to read! ASAE's Study Guide is your new best friend. It's instrumental to your success.
2. Don't underestimate the test, but believe that you will pass. If you think you can or can't, you are right.
3. Take the practice exams and quizzes, again and again.
4. Visualize yourself walking on the stage at the next ASAE Annual Meeting
5. Finally, write "CAE" after your name on your notes as you begin your test. It will keep you motivated and focused at hour three of the exam!

QAS Program Serves as Cost-Effective Association Bootcamp

by Suzanna Park Hogendorn

Do you have recent hires who are new to associations? Have you had to take on unfamiliar roles and responsibilities? The Qualified Association Specialist (QAS) Certificate Program is a 12-session on demand course that provides an educational boot camp to the association industry.

The program covers the following topics:

- Organization Types and Management Structures
- Board Governance and Volunteer Management
- Financial Management and Budgeting
- Administration and HR
- Legal Issues in Associations
- Marketing, Communications and Crisis Management
- Social Media and Online Communities
- Membership Recruitment, Engagement and Retention
- Meetings, Conferences and Tradeshow
- Non-dues Development and Training
- Public Policy and Government Relations
- Technology and Data Management

The cost is $295 and WSAE members receive a discount of $100. The discount code is available by contacting WSAE staff at membership@wsae.org. You have six months from registration to complete the program. The sessions are led by association experts and last one hour. You will take a ten-question quiz at the end of each topic that you must pass with a score of 80%. You can take the quiz as many times as needed. Upon completion of the program, in addition to gaining a comprehensive overview of association management, you will receive a QAS certificate and twelve CAE credits. A terrific value if you are considering pursing a CAE. Make sure to let everyone know about your new certification with a post on LinkedIn! We asked some recent graduates of the program about their experience and tips. ■

Kris Ackley

Associate Director
AMPED Association Management

Why did you decide to pursue the QAS certificate?
The certificate program looked like a great overview of the most important aspects of association management. I am working towards pursing CAE certification and the program helped me realize the areas I need to focus on.

What impact is completing the QAS program having for you and your career?
The QAS program was a great stepping stone in my pursuit of the CAE certification. In reviewing the topics, I feel more confident leading the associations I currently work with. It's helped to expand my knowledge base in some areas where I wasn't proficient.

What advice would you give to a colleague considering participation in the QAS program?
The QAS program is an affordable course for all levels of association professionals. Whether you are a seasoned professional, or someone just entering association management, you will learn something that is helpful in your everyday work. At the very least, it's a great review course for those preparing for the CAE.

Isabelle DeVooght Blaney

Event Planner
Badger Bay Management

What advice would you give to a colleague considering participation in the QAS program?
There is no downside to participating in the QAS program, only positives will come out of it. You'll be able to help your clients better and your deeper understanding of associations will benefit your career.

Monica Goeke

Director of Marketing, Services and Events
Wisconsin Hotel & Lodging Association

Why did you decide to pursue the QAS certificate?
I decided to pursue the QAS certificate because I was working toward gaining 100 hours of education for the CAE application. For a reasonable price I was able to get 12 credit hours on association management topics. The program also seemed like a good fit because it was self-paced so I was able to work through it at my convenience.

What impact is completing the QAS program having for you and your career?
I was able to use the hours to submit my CAE application, which was a huge accomplishment. The information I learned during the classes reinforced a lot of concepts that I've learned through working at WHLA and will be tested on when I sit for the exam in May. Overall the program was helpful in providing an overview on the many areas that impact our work in the association management field.

What advice would you give to a colleague considering participation in the QAS program?
Go for it - especially if you are working toward the 100 CAE hours.

Nathan Florek

Marketing Coordinator
AMPED Association Management

Why did you decide to pursue the QAS certificate?
I decided to pursue this certificate because I am new to the industry and many of my coworkers recommended it.

What impact is completing the QAS program having for you and your career?
This provided me with the base knowledge I needed to understand at a high level how associations operate.

What advice would you give to a colleague considering participation in the QAS program?
This is a time-effective opportunity to gain the knowledge you need to understand the basic operations within associations.

Christopher Boomsma, Ph.D., CPAg, CCA, DES

Director of Education
Science Societies (ASA – CSSA – SSSA)

Why did you decide to pursue the QAS certificate?
I wanted to expand my knowledge in society management at a reasonable cost and prepare myself for the Certified Association Executive (CAE) exam.

What advice would you give to a colleague considering participation in the QAS program?
The QAS program is a high-quality, informative, and well-priced option for those looking to gain knowledge in society management on their own schedule. It's a great stepping stone to the Certified Association Executive (CAE) certification. Managers could use it as an onboarding tool, particularly for individuals new to the association industry. Industry veterans could easily use it to reinforce key aspects of society management that they may have forgotten since their entry into the association world.

Maggie Gruennert, CMP

Senior Association Director
Badger Bay Management

What advice would you give to a colleague considering participation in the QAS program?
Go for it! It was a comprehensive program that covered a variety of association management topics. It is great for anyone just getting into association management and a great refresher for those who have been in the game longer.

Cheryl Lytle

Events Director
Wisconsin Grocers Association

Why did you decide to pursue the QAS certificate?
I'm in hot pursuit of gaining CAE credits so that I can take the exam in December 2022. I signed up for the QAS certification program because it provides educational credits, and the self-paced structure fit great into my schedule. The QAS program provided a great introduction for the materials covered in the CAE exam,

and included key areas relevant to anyone in the association industry. This program provides vital information for the successful operation of an association.

Sandy Schueller

Executive
Association Resource Center

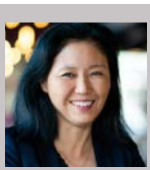
Why did you decide to pursue the QAS certificate?
I took the QAS course to get more credits. I am currently pursuing the CMP certification and then plan to pursue the CAE certification.

What advice would you give to a colleague considering participation in the QAS program?
I found the course to be very informative and would recommend to anyone in the association management field.

Marie Odden

Account Executive
Association Resource Center

Why did you decide to pursue the QAS certificate?
I pursed the QAS certificate because I am studying to obtain my Certified Association Executive (CAE) credentials.



Suzanna Park Hogendorn is a Membership Manager for AMPED Association Management.

QUALIFIED ASSOCIATION SPECIALIST

The Qualified Association Specialist (QAS) Certificate Program is an affordable educational program for professionals in the association industry provided through the Florida Society of Association Executives (FSAE) Program fees are $195 for partner SAE members (including WSAE members) and $295 for non-members. Contact membership@wsae.org for the WSAE member discount code.

STRATEGIC PLAN 2022

MISSION

Creating meaningful connections and enhancing competencies of association professionals.

VALUES

Fostering a welcoming and inclusive community

Operating with integrity by being open, honest, and transparent

Promoting association management rooted in passion, a positive attitude, and fun

Shaping the future by identifying industry trends and developing dynamic responses

STRATEGIC OUTCOMES

COMMUNICATION

WSAE will capture the attention of current and prospective members highlighting the Society's unique benefits and programs in a timely and relevant manner.

Create a marketing and communications plan to promote WSAE opportunities and events. *WSAE Staff*

Book and share dates for remaining 2022 educational events, and book and promote all 2023 event dates. *WSAE Staff, CVBs assist with bookings*

- Roadshow – March 2022
- Live at Lambeau – July 2022
- CEO Retreat – August 2022
- WSAE Reception at ASAE Annual Meeting – August 2022
- Women's Executive Forum – September 2022
- WSAE Summit/Annual Meeting – November/December 2022
- Board meetings 6x/yr
- CEO Roundtables – as hosts become interested, 2-3x year, in person
- NextGen Summit – Fall 2023

Make recommendation to the board to determine the future of *Vantage Point* regarding format and frequency. *Editorial Council*

ENGAGEMENT

WSAE will provide opportunities for members to participate in effective and engaging programming developed to address a variety of needs of association professionals and providers at all stages of their careers.

Develop an Women's Executive Forum. *Visit Milwaukee and Women's Executive Forum Task Force*

Create a clear and consistent structure for committee volunteers, including roles, responsibilities, terms, application process, and recognition. *WSAE Staff*

Define and develop a NextGen Program, aimed at engaging early-career association professionals with the goal of hosting in Fall 2023. *Young Professional Director of the Board and NextGen Taskforce*

FINANCIAL SUSTAINABILITY

WSAE will sustain financial resources sufficient to secure a reserve of one year of operating expenses.

Survey the industry partners for needs assessment and determining opportunities. *Industry Partner Committee*

Provide early intervention to companies/individuals with low engagement rates through at-risk plan. *Membership Development Committee*

Provide outreach to prospective WSAE members, aiming to reach new membership outreach to bring in 5% (25) new members in 2022. *Membership Development Committee*

Identify new non-dues revenue sources, and define purpose and goals (and promote) the Move Mountains giving campaign. *Secretary/Treasurer of the Board and WSAE Staff*

Caley Mutrie, CAE, IOM, and Amanda Schellinger celebrate The Women of FOCIS

Caley Mutrie, CAE, IOM, Executive Director of Association Acumen's client, the Federation of Clinical Immunology Societies (FOCIS), and **Amanda Schellinger,** Membership and Marketing Manager, contributed to the article, *The Women of FOCIS: promoting equality and inclusiveness in a professional federation of clinical immunology societies.* The article was published in the April 4 issue of *Frontiers in Immunology,* section Alloimmunity and Transplantation.

Authored by Elaine F Reed, Anita S Chong, Megan K Levings, Caley Mutrie, Terri M Laufer, Maria Grazia Roncarolo and Megan Sykes, the article presents a retrospective analysis of gender equality practices of FOCIS to identify areas for improvement and make recommendations accordingly.

"Amanda and I are pleased to have been able to participate in this very important publication," Caley said. "I want to especially highlight Amanda's outstanding and tireless work on data collection. The data was key to the success of the project!"

Isaiah Perez named Executive Director at Association Acumen

Isaiah Perez has been named Executive Director at Association Acumen. Isaiah will lead the Michigan Academy of Physician Assistants (MAPA), and Indiana Academy of PAs (IAPA). Both MAPA and IAPA are managed by Association Acumen.

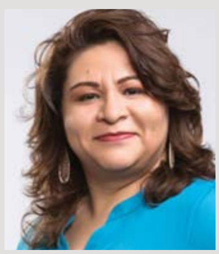
Amanda Schellinger promoted at Association Acumen

Amanda Schellinger, has been promoted to Membership and Marketing Manager. Amanda's clients include the Automotive Fleet and Leasing Association (AFLA) and the Federation of Clinical Immunology Societies (FOCIS).

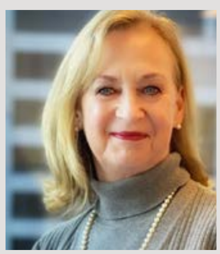
AMPED Association Management experiencing growth

AMPED Association Management (AMPED) is pleased to announce that **Alex Joers** has been appointed as the Associate Director and Program Manager for both the Society for Research on Adolescence (SRA) and APTA Geriatrics. In this role, Alex will oversee day-to-day operations, while assisting with governance and education development for both associations.

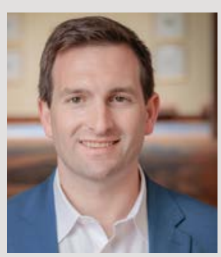
AMPED is also pleased to announce that **Dana J. Murn, CAE** has been appointed Associate Director and Program Manager for the Neuro-Developmental Treatment Association (NDTA) where she will provide program oversight and strategic direction of educational programming to drive growth in membership, certification and revenue.



AMPED excited to welcome **Brenda "Bree" Villarreal, CAE**, as Associate Director and Program Manager for both Leadership California and the Society for Research on Adolescence (SRA). Villareal was a 2018 recipient of the Diversity Executive Leadership Program (DELP) awarded by the American Society of Association Executives (ASAE).



AMPED Association Management is pleased to announce that **M. Suzanne C. Berry, MBA, CAE** will be serving as interim Executive Director for both the American Academy of Anesthesiologist Assistants (AAAA) and the Association for the Advancement of Wound Care (AAWC). Suzanne's role includes the management of the day-to-day operations of AAAA and AAWC including advocacy efforts, governance support and fiscal management.



AMPED Association Management is also pleased to announce that **Michael Battaglia, CAE, CNAP, MBA** has been appointed as Chief Executive Officer (CEO) for the Association of Equipment Management Professionals (AEMP) and the Woodworking Machinery Industry Association (WMIA). Michael's role as CEO will include management of the day-to-day operations of AEMP and WMIA, as well as leading strategic planning and growth efforts. Michael also serves as the Vice President of Client Services at AMPED.

Impact Association Management announces new hires and promotions

Impact Association Management welcomes new staff members:

- **Marni Steinberg**, Marketing Specialist, has more than 25 years of experience working in advertising, marketing, client services and event planning for several recognizable brands, organizations and nonprofits.
- **Sawyer Myers**, Association Manager, brings over seven years of customer service and team leadership experience to the Impact team.
- **Kathryn Watson**, Association Manager & Financial Specialist, has extensive experience with both private and non-profit organizations in financial management, bookkeeping, budgeting, and QuickBooks.
- **Shawn Wier**, Senior Meeting Planner, is a Certified Meeting Professional with many years of experience in conference and event planning.

Impact staff promoted from within:

- **Jill Miller**, Associate Executive, will now be responsible for effectively leading staff in the deployment of best practices in association management, overseeing implementation of client strategic goals, overseeing legal responsibilities of the organizations she works with.
- **April Schultz**, Business Services Manager, to include all things Impact internal, specifically in recruitment and marketing, but also managing large company initiatives.
- **Alyssa Merkle**, Association Manager & Data Specialist, will be doing a data audit on all membership data, and cleaning data up before Impact starts working with them - a new part of their client onboarding process.

Impact Association Management achieves AMC Institute accreditation

Impact Association Management announced it has recently been awarded accreditation by AMC Institute, the global trade association representing the Association Management industry.

New hires at VISIT Milwaukee

VISIT Milwaukee is proud to announce two staff promotions and one new hire. **Michelle Haider** has been hired as director of event experience. She brings extensive experience in event management and proven success in partner and client relations.

Meg McKenna has been promoted to senior director of strategic and community partnerships, responsible for planning, leading, and executing VISIT Milwaukee's private fund development activities, as well as growing revenue. **Lesa Edwards** has been promoted to finance manager, Edwards started with VISIT Milwaukee in 2020 as a staff accountant.

Congratulations to Madison Area Builders Association on awards

Madison Area Builders Association (MABA) received two 2021 Awards of Excellence from the Executive Officers Council (EOC) of the National Association of Home Builders (NAHB):

1. Best Home Builders Association (HBA) Partnership/ Coalition for our partnership with the Boys & Girls Club of Dane County to build the McKenzie Regional Workforce Center
2. Best Workforce Development Plan Implemented for the partnerships formed and the programming developed for the McKenzie Regional Workforce Center.

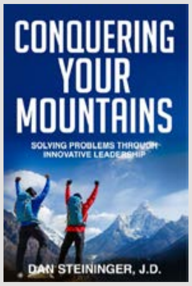
Voted Best Lakeshore Resort: The Osthoff Resort

The Osthoff Resort is incredibly honored to have been awarded the 2022 Best Lakeshore Resort from Wisconsin Meeting's Magazine in their 2022 Reader's Choice Awards. The Osthoff Resort also received the new and coveted AAA Four Diamond "Inspected Clean" status for outstanding cleanliness standards throughout the property. This new sanitation process for AAA properties is recognized by the Centers for Disease Control and Prevention (CDC), and is currently used in healthcare, food service, education and other settings requiring effective sanitation-monitoring programs.

Hilton Garden Inn Sun Prairie receives Award of Excellence

Congratulations to the **Hilton Garden Inn Sun Prairie**, recipient of a Hilton Award of Excellence! The Hilton Award of Excellence recognizes the top 5% of hotels in each brand for balancing exceptional product and overall guest experience while representing the customer promise to deliver the most reliable, friendly service.

Award-winning columnist, CEO pens new book



In his new book, *Conquering Your Mountains - Solving Problems through Innovative Leadership*, WSAE member **Dan Steininger,** provides a recipe and resource book for business owners and CEOs. Based on 40 real life success stories, readers can quickly navigate to the appropriate chapter for answers to their particular problem.

Recalibrating Expectations of the Work/Life Balance Adage

by Christina McCoy, CAE

Hello, dear reader! I'm Christina McCoy, your new WSAE President and CEO. Since I'm new around here, let me share a few things about me and what inspires my work and life - and, if I'm lucky, maybe inspires you just a little, too.

First and foremost, I'm a wife and mother of three young kids, ages 7, 5 and 2. My personal life consists of a lot of rushing and waiting. Rushing to get to the school bus stop and then waiting for the bus. Rushing to get our daughter dressed for gymnastics and then waiting for her class to end. Rushing to get kids ready for bed and then waiting for them to fall asleep. You get the picture.

In the middle of all this back and forth are life's precious moments that inspire me each day. Or, on some more challenging days, these moments remind me of how grateful I am to have a day job working with professionals like you, to escape to.

This leads me to what I imagine we are all thinking - life and work keep us really busy. Our lives are filled with endless things to do and expectations of ourselves and others. How can we keep up? Or, dare I say, be allowed to step away and enjoy a vacation?

Allow me to introduce you to a theory I read about several years ago that completely changed how I thought about the exertion of one's energy. It's called the *Four Burners Theory*.

Imagine a stove representing your life with four burners on it. Each burner stands for one central area of your life: *family, friends, work/career* and *health*. The theory says that "to be successful, you have to cut off one of your burners. And to be really successful, you have to cut off two." Pretend you are cooking a meal on the stove. Do you ever cook four different foods simultaneously with all the burners turned on high? Probably not. And if you do, what are you cooking (please send me the recipe)? Any good cook knows you make the main course in a large pot or pan and have the side dish cooking on a second burner. Perhaps, you have a sauce simmering on the third burner, but it's an easy sauce and you only need to heat it.

I have my work/career, family burners turned on high, and the friends and health burners are turned off entirely. These days, my "work-outs" include evening family walks around the neighborhood or using my standing desk at work. Friend time consists of catching up on a phone call during my work commute.

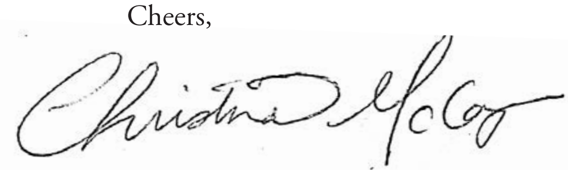
Which burners do you have on right now, and why? Do you need to turn some down and recalibrate?

ALLOW ME TO INTRODUCE YOU TO A THEORY I READ ABOUT SEVERAL YEARS AGO THAT COMPLETELY CHANGED HOW I THOUGHT ABOUT THE EXERTION OF ONE'S ENERGY. IT'S CALLED THE *FOUR BURNERS THEORY.* IMAGINE A STOVE REPRESENTING YOUR LIFE WITH FOUR BURNERS ON IT. EACH BURNER STANDS FOR ONE CENTRAL AREA OF YOUR LIFE: FAMILY, FRIENDS, WORK/CAREER AND HEALTH.

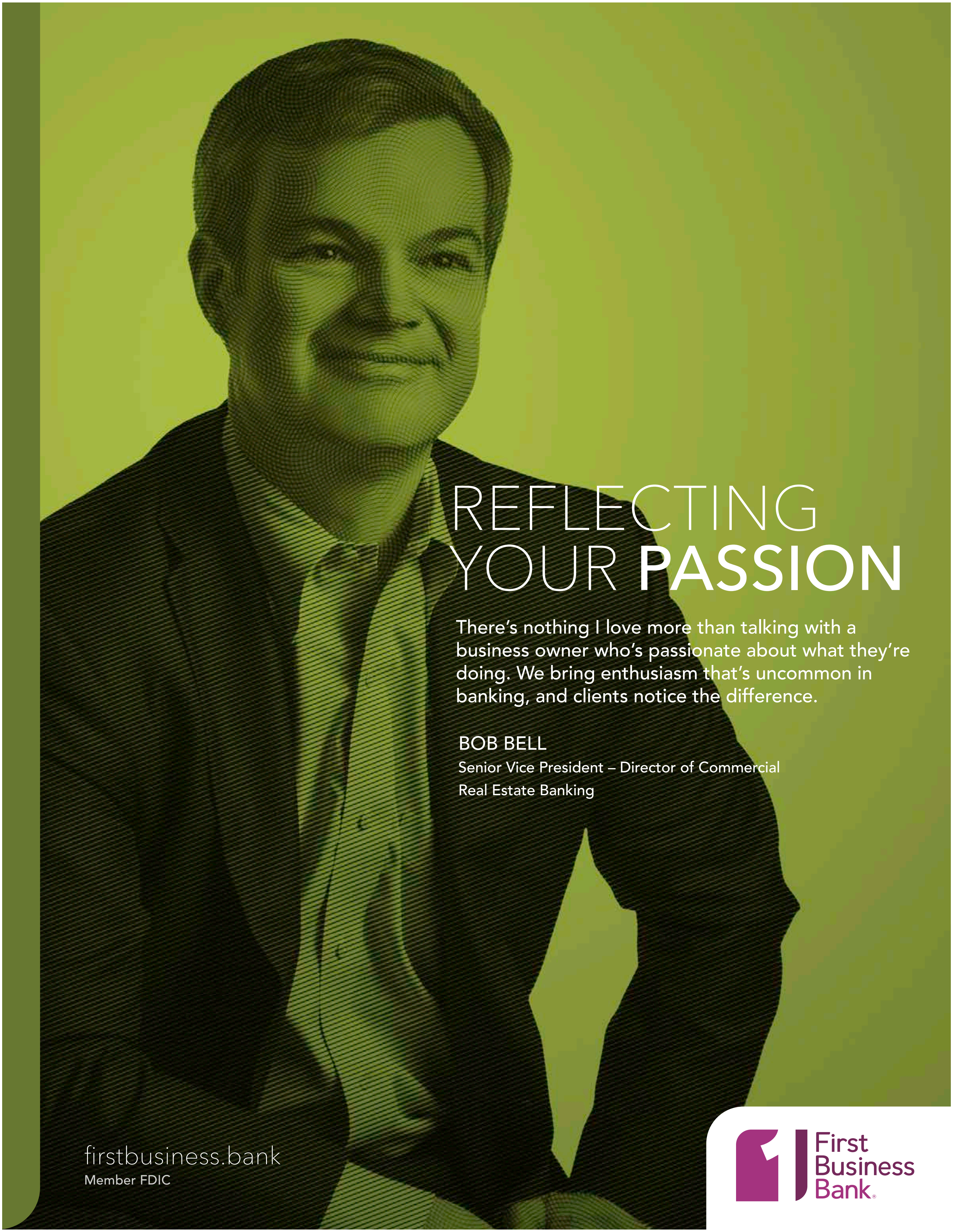
DO YOU EVER COOK FOUR DIFFERENT FOODS SIMULTANEOUSLY WITH ALL THE BURNERS TURNED ON HIGH? PROBABLY NOT.

MORE ABOUT THE FOUR BURNERS THEORY

Cheers,



Christina



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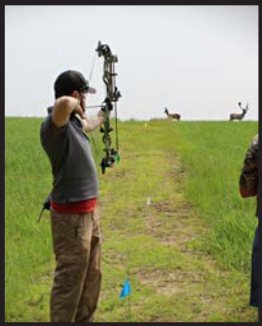

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