

# VANTAGEPOINT

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

- 1. Dream Big*
- 2. Set Goals*
- 3. Take Action*





# New! Member Resources

## Make better-informed strategic decisions with discounted resources

WSAE has begun 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.

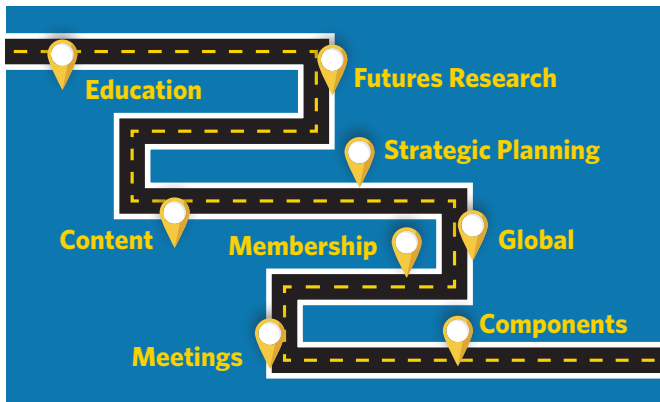


### Association Laboratory Inc.

Association Laboratory is a full-service research and strategy company that serves trade and professional associations.

Industry topics and resources offered include the following:

- **Futures Research** - Looking Forward™ environmental scan
- **Strategic Leadership, Governance and Planning** - Creating and sustaining a strategic board and building a leadership pipeline
- **Membership** - Membership, engagement and engaging younger association professionals
- **Content** - Content strategy 101 and introduction to creating and sustaining and association content strategy
- **Meetings** - Planning for the meetings of tomorrow
- **Components** - Future of component relations
- **Global** - Global engagement strategy



More information: [www.wsae.org](http://www.wsae.org) > Resources > Association Laboratory

## WSAE joining new real-time compensation benchmarking program

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.



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More information: [www.wsae.org](http://www.wsae.org) > Resources > Compensation Benchmarking

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*VantagePoint* is published quarterly in January, April, July, and October. The deadline for submission of copy and advertising is the first of the month preceding publication. For information about advertising rates, contact the WSAE office. Copyright © WSAE 2020.

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# Do One Extra Thing to Make a Huge Difference

by Kathy Raab, CAE, CNAP



December 2019 marked the end of so many things – obviously, the calendar year of 2019; another year of WSAE membership; Game of Thrones and Big Bang Theory; the end of the Volkswagen Beetle!

But it's also the beginning of an exciting time for me. As Chair of WSAE I'm looking forward to a great year focused on top-notch education (including many hours of CAE credits) and increased membership. WSAE has been an outstanding resource for

RAISING THE TEMPERATURE OF WATER JUST ONE DEGREE MEANS THE DIFFERENCE BETWEEN SOMETHING THAT IS SIMPLY VERY HOT AND SOMETHING POWERFUL ENOUGH TO POWER A LOCOMOTIVE.

me since I joined in 2006. Some years I've had more time to be active and other times I just know my colleagues and their collective brain trust are just a phone call or email away. That has sustained me in the tougher times and brought me joy and professional satisfaction when I've been able to contribute to others. Just knowing there are others who have been through the same trials and successes is great comfort. The longer I engage in association management, the more I appreciate the

dedication of others who have walked this path. Thank you to all who have supported me along the way. I hope I can count on your support in 2020 at WSAE!

One of the greatest challenges for me is to motivate – myself, my staff, my leadership team and my members. As a thank you gift for our volunteer leaders at Metropolitan Builders Association, we've handwritten notes of appreciation inside a motivational book, *212°, The Extra Degree: Extraordinary Results Begin With One Small Change*, by Sam Parker. Sam describes how raising the temperature of water just one degree means the difference between something that is simply very hot and something powerful enough to power a locomotive. If we all gave one extra degree to everything we do, WOW. What if we all gave one extra degree to just *one* thing we do every day or in one aspect of our lives? Could we make a difference? You bet!

Many associations operate on a calendar year. Do you find it refreshing to press the *restart* button with a new board, new ideas and new budget? How do you keep yourself motivated? I'd love to share stories – both success and *oops* experiences – feel free to email me at [kathy@mbaonline.org](mailto:kathy@mbaonline.org) to start a conversation!

The CEO roundtables, now happening in both the Madison and Milwaukee areas, are great ways to connect with peers on ideas, challenges and accomplishments. If you're a CEO and have not yet attended, try checking one out in 2020. If you're newer to the association management world, try a webinar and commit to attending at least one in-person event in 2020. As an Industry Partner or meeting planner, get more involved on a committee to share your ideas, goals and experiences. I'm never disappointed when I meet a new member or get to know one I've met before a little better. **Make 2020 a year of doing one thing more than just paying your dues!**

My goal for 2020, personally, is to be more aware of where I can make a difference and to put my energy in those buckets. I have so many areas where I'll need to be more organized, more positive, more confident, more consistent in order to make that happen, but I'm looking forward to the start of a new year where I can make a difference and have fun doing it. ■



## Calendar of Events

See the calendar at [www.wsae.org](http://www.wsae.org) for more information on these events, and to register.

**Roadshow**  
March 16-17  
Milwaukee and Madison

**Madison CEO Roundtable**  
March 26  
Madison

**2020 Executive Exchange**  
July 19-20  
The Osthoff Resort, Elkhart Lake

**SUMMERTime to Shine**  
Details TBD

**Summit**  
October 26-27  
Brookfield Conference Center,  
Brookfield



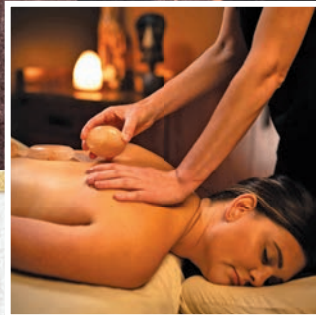
**Tips & Tools for Eye-Catching Marketing**  
February 5

**Using Benchmarks in Competitive Analysis**  
February 19

**Audience Research to Assess Member Needs**  
March 11

**The Missing Link to Building Member Loyalty**  
March 25

Check out the  
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# Three Questions to Address Before any ASK<sup>®</sup>

by Laura Fredricks, JD

Before you make your best *ask*, there are three very important questions you need ask yourself. Think of this exercise as goal-setting which many of us do at work and at home. If you never set a goal, you never achieve that goal. If you never ask, you never get what you want.

Setting goals is a must when you need to ask. Once you set your goals, you can filter out all of the unnecessary things that might prevent you from ever making your ask. For instance, if you keep second-guessing why you are asking, instead of what you are going to ask, you never get to the ask. Setting these goals will keep you focused on what you should be focused on, your ask. It also makes you more prepared. When you are more prepared, you are more confident. When you are more confi-

FINDING THE RIGHT BALANCE BETWEEN SPECIFICITY AND BREVITY IS IMPORTANT. YOU WANT TO BE SPECIFIC ENOUGH THAT IT PROVIDES A CONCRETE GOAL, BUT KEEP IT SIMPLE ENOUGH SO THAT IT IS ATTAINABLE AND YOU DO NOT GET LOST IN EXTRA DETAILS.

dent, your ask becomes more attractive to the person you want to ask.

Setting your goals also allows you to set the playing field. In the process of making your ask, knowing what you need, when you need it and who can give it to you prepares you for whatever response you may receive. Setting your

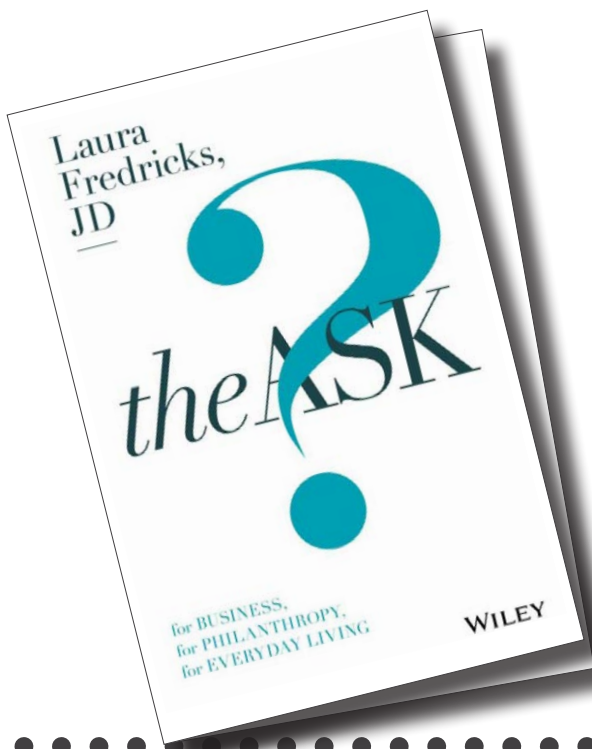
goals makes it harder for the person you are asking to catch you off guard, change the conversation or give you a surprise answer. If you go in knowing how to articulate your own needs, you'll always be in control of exactly what you will say.

Knowing exactly what you want to say and practicing your ask words will ease your tension and anxiety that can come up when you ask. It will help you feel more confident about how the conversation will go because you have prepared the conversation. Anxiety is known as the *fear of the unknown*, and if you're ever anxious before making a huge pitch, it's because you're afraid of how it might go. We can easily do away with those fears if you just take a few minutes to ask yourself, and answer, the following questions.

Ask yourself these questions before making any ask to ensure your success:

## 1) What do you want?

Be specific, and keep it brief. If you are asking for money, then you need a specific amount. There is a world of difference between asking for *an increase* and asking for *\$10,000*. When you make any ask, you need to have a crystal-clear idea of exactly what you want. This is your first simple goal. Don't overcomplicate it. Don't over-explain it to yourself in your head. If you are asking someone to do something for you, such as pick your daughter up after school, then just ask "Can you pick up Chrissy today after school at 3:00 pm? This would be so helpful to me." Most of us overcomplicate the ask by going into extraneous details about why you can't do it, how you are overworked or overburdened, and how your schedule is over-



whelming. Finding the right balance between specificity and brevity is important. You want to be specific enough that it provides a concrete goal, but keep it simple enough so that it is attainable and you do not get lost in extra details.

## 2) When do you want it?

Know the specific time or date of your ask. There is a huge difference between *I'd love you to consider this by next week* and *Can I call you next Tuesday at 10:00 am so that we can go over the details and sign the agreement?* This is your second simple goal. You should have absolute certainty that your ask contains the exact time frame that you want your ask to come to a conclusion. If you don't, I assure you that a week will turn into a month. A month will turn into two or three months and now your ask is so old, the person has forgotten what you asked. You might get what you asked for, but you might not get it at the time you wanted it. By laying out the specific time frame of when you want it, you make time work for you, not against you.

## 3) Who can give it to you?

This third simple goal is so important and yet is overlooked so many times. This goal requires you to write down in priority order who you have the best chance of asking and getting exactly what you want. Sure, many of us make a list, or at least have it in our heads, of who we would like to ask, but are those people really the right people to ask? By *right* I mean are they the ones who know and trust us the best, and also have the means and inclination to say yes? So many times, we go to the people who we assume are the *easy* ones, such as the ones who won't be confrontational or the ones who have said yes before. They may be on your list but when you ask, the order in which you ask is very important. If you need money for a start-up project, you should go to the person who could give you the largest amount first, who knows and trust you, and has the means to do so. If you ask this person half-way through your fundraising, I guarantee they will give you a lesser amount because they were not asked first. You actually do this every day without recognizing it. When you are unhappy with a purchase or frustrated with a service, what do you do? You ask to speak to the manager. You don't waste time speaking to people who work for the manager, because they do not have the power to fix it. The manager does. So, when you ask for what appears to be *larger* things, and often these involve money, remember your third goal – ask people in order of priority who can give you exactly what you want. ■



**Laura Fredricks, JD**, as CEO and Founder of THE ASK®, trains and coaches individuals, nonprofits and businesses on *How to ASK and GET exactly what you want*. More info at [www.ExpertOnTheAsk.com](http://www.ExpertOnTheAsk.com). Laura will also be the **2020 WSAE Roadshow presenter**. Be sure to join us in March!

# 2020 WSAE Roadshow: Join us March 16-17, 2020!



2020 WSAE Roadshow presenter *Laura Fredricks, JD*

Presenter Laura Fredricks, JD, will present on topics related to **Making the Ask:**

- Monday, March 16, in Milwaukee
- Tuesday, March 17, in Madison

The Roadshow will feature Laura Fredricks, JD. Her structured *5-Step Process for any ASK* has brought resounding sustainable success worldwide. For over 27 years, she has advised and guided organizations on current trends that impact and influence the for-profit and nonprofit world. Her six books, including three on THE ASK®, are the international industry leading go-to guides. Her latest book: *THE ASK: For Business, For Philanthropy, and Everyday Living* has helped hundreds of boards, attorneys, entrepreneurs, teenagers, artists and philanthropists get their best life possible, through THE ASK.

Laura is the co-host of the international radio show: REAL TALK LIVE which reaches 6 million listeners. Her *Asking Strategies for Better Living* have been featured in: *New York Times, Shape, Women's Health, Self, Huffington Post, Wall Street Journal; and even The Bridal Guide* – “How to ASK your way to your Destination Wedding.” She has been interviewed for Anderson Cooper 360; ABC News; Fox and Friends; and Fox's America's Headline News.

Complete info at  
[www.wsae.org!](http://www.wsae.org)



# Harness the Power of Podcasts

WSAE members share their experiences in this growing digital medium

Compiled by Denise Barnett

*Nine association pros weigh in on how their organizations got into podcasting, who they target and how, what it takes to produce a podcast and advice for others considering jumping on board. Meet the contributing panelists below.*

## What was the prompt to get into podcasting?

**Bzdawka-Plizka:** Our website and social media editor and a past president were talking about a podcast they both listened to and decided it would be a great idea for us to start doing podcasts as well.

**Davis:** This was member-driven. We don't make money on podcasts.

**Kowalski:** Mostly another format to get information to our members. We have members who spend considerable time in the car and this is a way to get content to them. We aren't generating revenue off podcasts yet.

**Tirado:** Podcasts are another tool to engage stakeholders. Many of our members are in trucks and traveling between project sites throughout the day, so this is a way to engage with them. The idea is to monetize them at some point through sponsorships or banner ads. This decision will be made after we conduct the pilot podcasts and have built an audience for them.

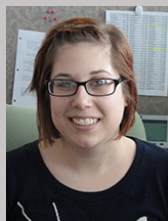
## What type of podcast does your organization produce?

**Geissler:** The podcast features interviews, but they are archived recordings of interviews from the 50s, 60s and 70s. Bob Barry, the interviewer, kept the recordings from during his radio career. He edits together key portions to share.

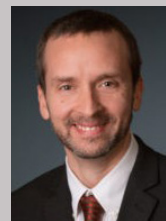
## Meet the panelists



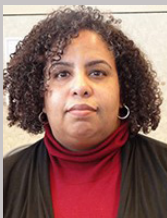
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**Cassidy Davis**  
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**Kyle Geissler**  
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**Vanessa Goodman**  
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**Eric Lanke, CAE**  
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**Allison Scheetz**  
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**Martin B. Tirado, CAE**  
Chief Executive Officer, Snow & Ice Management Association, Inc.



**Caroline Wittenberg**  
Communications and Marketing Manager, Certification Board of Infection Control & Epidemiology/EDI



**Goodman:** Our podcasts are hosted by one of our members, and primarily he interviews guests that have published scholarly articles relevant to, and included in, the ACMS Online Bibliography. While many of the guests are members of the College, he has on occasion interviewed experts from *medically adjacent* fields, as well as members who can provide a unique perspective, such as an outgoing President, new members, etc.

**Lanke:** We do an interview format. Our goal is to talk with interesting people who are moving fluid power technology forward. So far we've talked to people behind interesting uses of fluid power, people from ancillary technology spaces that are impacting fluid power, and some young people who are just beginning their careers in fluid power. We heavily leverage technology speakers that present at our Regional Conferences. We also look for people behind the interesting applications featured in the trade publications. And now that the podcast is up and running, we're getting requests from member companies who want to be guests.

**Scheetz:** Our podcasts focus on recent articles released in the professional journal. Typically, the managing editor will interview one or more featured article authors. This works out to be about two questions each, so it is a fast-paced interview that lasts about 15-20 minutes. Our managing editors select what they believe is a hot topic, and they choose articles to go with that theme.

**Wittenberg:** The format is very conversational and interview-oriented. Aside from the occasional one-off podcast where I will be speaking on my own, for the most part, it is Q&A-formatted with either a volunteer from the board of directors or a subject-matter expert. A lot of the topics correspond with initiatives we are actively working on, such as marketing research studies or attendance at exhibiting conferences. Some topics are also timely in that they correspond with National or World days that are of interest to the certificant. I usually ask for volunteers during marketing committee calls and/or cold contact potential interviewees. I would recommend keeping an editorial calendar of future topics and taking a look at <https://nationaldaycalendar.com>, as you never know where content might come from.

### Who is your primary or target audience?

**Davis:** Our primary target is members. However, we also use the podcast to target new members. Anyone can listen to our podcasts as they are publicly accessible through iTunes and Google Podcasts.



WE ARE ALSO LOOKING TO LAYER THE PODCASTS TO PROMOTE SPEAKER SERIES AND PRINTED PIECES, CREATING AN INTEGRATED MARKETING PROGRAM WHERE PODCASTS ARE A COMPONENT BUT NOT A STAND-ALONE PRODUCT.

**Geissler:** Because of the content, the target is limited to older listeners. Wisconsin and Milwaukee residents would be particularly interested.

**Lanke:** In the broadest sense, we're aiming at anyone interested in the topic. Part of the reason for doing this is to spread the word about our industry and its technologies to a wider audience.

**Scheetz:** The target audience for us is younger membership, early career professionals and those interested in working in the field.

### How often do you record and release episodes?

**Bzdawka-Plizka:** We post two podcasts a month. We try to have a few in the hopper so if we get busy there is always one on a general topic to post.

**Davis:** We have about six podcast series going right now. They range from publishing quarterly, every-other-month, twice monthly and sporadically when they have content.

**Geissler:** We release weekly on Wednesday. If we can tie a release to a holiday or obituary, we do that.

**Goodman:** We recorded as time permits – it is often difficult to align the host and guest – so we may record three in one day, or two in one week. The finished podcasts are released about once a month; we like to have at least two recorded and ready for editing at all times so that when scheduling is most difficult, we are still able to release the podcasts monthly.

**Kowalski:** Monthly, and they are scheduled over a period of time.

**Lanke:** We post a new episode every other Monday. We schedule and record them whenever we can, and have so far been staying about 3-4 episodes ahead of that schedule.

**Scheetz:** We began podcasting once per quarter, but the membership was loving the podcasts so now we've increased to two podcasts a quarter.

**Tirado:** We've produced four since summer, so around one per month. We schedule them out so there's time between each podcast.

**Wittenberg:** I try to record new content every month but more often than not, it is every other month. I will plan a topic in advance based on an editorial calendar I manage, send the presenter talking points and a list of questions and then record it after he or she has had time to review. After the recording, the episode is released sometime in the next week or two on the website and promoted concurrently with the newsletter and social media.

### Do you self-produce or contract out production?

**Bzdawka-Plizka:** We self-produce because it was cheaper than hiring an agency to produce them.

**Davis:** We self-produce. We assist leadership in recording, take the recordings and edit, add music and intros/outros and then publish through an RSS feed.

**Kowalski:** We self-produce. It's low-cost and fits our needs.

### What's the price tag of a podcast?

**Goodman:** We use Ringr and Audacity to record and edit, and we have purchased equipment specifically to record. I've not calculated the cost of staff time, but we spend about \$190 a year for Ringr.

**Tirado:** Affordable. Less than \$1,000/podcast. Probably less than \$500 but I've never broken it out on specific staff time.

**Wittenberg:** I would say the price tag is in the form of hours and it is around 3-4 hours per podcast, between communicating with the presenter, drafting questions and talking points, recording the podcast, and editing/posting it.

### What's up next for your podcast?

**Geissler:** Future plans will be determined by the success of this podcast. We're watching the numbers closely and considering other ideas for future podcasts.

**Goodman:** There are no immediate plans to change the format – it's working well, and listenership is increasing.

**Kowalski:** Revenue streams could be next – adding sponsors to the series. We are also looking to layer the podcasts to promote speaker series and printed pieces, creating an integrated marketing program where podcasts are a component but not a stand-alone product.

### Final thoughts or advice for others?

**Davis:** Editing can be very time-consuming depending on the amount of editing you want to do. So whatever you are think-

ing it will take, double it – regardless of whether you are planning to edit lightly or heavily. Also, investing in good recording equipment is key. People are not forgiving of bad audio.

**Lanke:** It's scary and fun – which, from an innovation point-of-view, tells me that we're onto something viable. The response from our members has been overwhelmingly positive. I get frequent comments about how much they appreciate the effort and like the content we're delivering.

**Scheetz:** Start small and affordable. The way we go about podcasts, by already using an existing conference line, it was easy to get our board on-board. We are already using the resources we have, and we started with only about four times per year. This is giving us an opportunity to grow to more podcasts with other publications. Now, we are also beginning to look into a semi-professional microphone to send to our managing editor. They are fairly affordable, ranging from \$15-\$50.

**Tirado:** It's a test-pilot project. Are some of our members and stakeholders listening to podcasts? We think so but won't know for sure until we analyze the data regarding number of listeners and downloads. So far, the data looks promising. Ultimately, to keep producing them they either need to be monetized or serve a mission-driven purpose, as opposed to simply producing good leadership stories, because we can.

**Wittenberg:** I recently created a podcast speaking tip guide for presenters, as I've found that the best way to prepare them is to reinforce that it's important to remain conversational and speak normally and clearly. Some of the tips include:

- Pay attention to your speaking volume - You should not need to speak any louder than normal but you will want to speak clearly and into your microphone or recording device.
- Steer the conversation - If answering one question leads you to address another topic, go with the flow as you naturally would while conversing.
- Prepare your message ahead of time - Review the questions that are sent to you and plan out your response. Whether that means jotting down a few notes or key phrases you'd like to incorporate into your response, your message will come across much clearer if you have an idea ahead of time of what you would like to say. ■

**Denise Barnett**, is Association Specialist at Executive Director Inc (EDI). She also serves on the Editorial Council for WSAE's *VantagePoint* magazine.



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# Listen to and Engage New Members to Improve Retention

by Gleb Tsipursky, PhD

Wouldn't you like a retention rate of 75 percent? Unfortunately, according to a 2017 report cited in ASAE's *Associations Now*, membership retention rates are falling. While in 2016, 73 percent of associations surveyed in the report had retention rates above 75 percent, in 2017 only 65 percent reached that rate. The numbers for new members are even lower.

These numbers are concerning. Yet statistics make it hard to grasp the actual experience of new members. Let me share the story of someone who joined, and then left, an association last year.

## A new member story

Sharon recently graduated college, secured a job and joined a national association of over 30,000 members and a staff of nine. Her reasons for joining:

- Becoming part of a community of peers
- Networking with others
- Accessing vetted learning opportunities

She got a useful welcome email with resources from the association. She appreciated the discounts on webinars, her preferred method of learning as an introvert.

In the newsletter, Sharon saw an invitation to the annual conference. As with a growing number of introverted millennials who prefer digital over in-person engagement, she never liked large events.

Sharon decided to check out the local chapter to decide whether to invest the effort and money needed to attend the national conference. Arriving at the local chapter meeting, Sharon found that existing members congregated in cliques and did not actively welcome new members. When she was live-tweeting the speaker's talk, she overheard one older member commenting to another about how *kids can't keep their hands off their phones nowadays*. The whole experience left a bad taste in Sharon's mouth and she decided to skip the annual conference.

Instead, Sharon decided to try to engage with the community of her peers online. She went to the association website and clicked on the Twitter button.

She saw that the association posted rarely, every 3-5 days, instead of the best practice of posting at least twice a day. Then, she went on Facebook, and saw that it committed the social media *faux pas* of simply reposting what the association posted on Twitter!

Her last hope: LinkedIn. To her frustration, the button on the association home page was broken. She searched around on LinkedIn and finally found the association, but saw that it - unfortunately - reposted the Twitter feed. She searched for a LinkedIn or Facebook group for her association, but couldn't find any.

Sharon thought about the situation. Joining the association didn't help her achieve her goals of networking or becoming part of a community. The discounts on webinars didn't come close to justifying the membership costs. She decided to avoid renewing her membership and pay the non-member price for webinars.



**Solving new member retention**

Your association may have more Sharons than may seem intuitive to you.

Research in cognitive neuroscience and behavioral economics shows that our intuition results in many dangerous judgment errors called cognitive biases. An example: the false consensus effect causes us to assume that other people are more similar to us than they actually are. Thus, association leaders replace an accurate understanding of new association members with memories of ourselves as new members. We forget that millennials are more introverted and digital-oriented.

Another bias - the overconfidence bias - causes association leaders to be excessively confident about what new members want. What if the national association sent out digital surveys asking Sharon what she wanted? What if it made her feel listened to and worked to build a relationship with her, something so many millennials seek? This is, in fact, easy to do so using association engagement software, such as Prop-Fuel and others.

Perhaps if Sharon's association had done so, it would have learned of her distress - and that of many other digital natives

ASSOCIATION LEADERS REPLACE AN ACCURATE UNDERSTANDING OF NEW ASSOCIATION MEMBERS WITH MEMORIES OF OURSELVES AS NEW MEMBERS. WE FORGET THAT MILLENNIALS ARE MORE INTROVERTED AND DIGITAL-ORIENTED.

- at the sad state of engagement. Perhaps it would have learned of the problematic environment in local chapters and would have guided chapter leaders to be more welcoming of new members and digital engagement at meetings.

Perhaps through engaging her and listening to her, the association could have convinced Sharon that its ways are changing to appeal to millennials like her, and she would have renewed her membership.

So how will you convince the Sharons among your new members to stay? ■



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



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# Kim DiMaggio

Executive Director, National Association of the Remodeling Industry (NARI) of Madison, Inc

## How did you end up working in the world of associations?

I was an un-conventional NARI member before working for the association directly. I created the awards for our Contractor of the Year Awards, and joined the awards committee. This introduced me to many members and to Kathy Raab, who held this role before me.

## With a little over a year in the role of NARI of Madison's Executive Director, what has been your greatest challenge or accomplishment?

We revitalized our membership committee this summer. This has helped tremendously, and has brought forth a new spark to both our board and our chapter. The people on this committee are real go-getters! This has helped with one of our greatest challenges - keeping members actively involved and making sure membership in NARI is a priority for their business.

## Tell us about the Contractor of the Year Awards.

For the Contractor of the Year Awards (CotY), we have our contractor members submit their award-worthy projects into award categories, such as Kitchens, Baths, Additions and Whole House, broken down into price brackets. These project entries are then judged by contractor/designer members from another NARI Chapter somewhere else in the country, based on six distinctive criteria/questions. The project portfolio they enter can be up to 30 pages, and it outlines the remodeling process using photos and text, describing different challenges they encountered, innovative uses of material/methods, evidence of superior craftsmanship, etc. to try and get the most points based on the six

WE INCLUDE A MEMBERSHIP MEAL FOR ONE PERSON FROM EACH COMPANY WITH THEIR DUES... IF WE CAN GET MEMBERS TO THE MEMBERSHIP MEETINGS, THEY ARE MORE LIKELY TO STAY ENGAGED AND RENEW, BECAUSE THEY SEE THE VALUE OF THE NETWORKING THAT OUR ASSOCIATION OFFERS!

questions. The contractors not only enter the portfolio but during the entry submission process, they can list any team members who are also NARI members and who helped in the remodeling project. We are so proud of our local chapter and the fact that we usually get 25-

30 entries every year, and within those entries we average close to 100 team members listed with the contractor. This just really shows the comradery amongst our members - They are proud to work together! We then present the winners of these projects at our Celebrating Excellence Event, usually held in November. The contractors don't know ahead of time if they won, or even how many entries were received in each category. It's always a really fun night!

## What's one thing your organization does to keep members engaged?

We encourage our members to put into their membership at the level they wish to receive benefits out of it. I've read that you shouldn't tell members that, but we absolutely believe it. We include a membership meal for one person from each company with their dues. This encourages our members to send someone from their company to these to take advantage of the networking and face-to-face time our members really value. If we can get members to the membership meetings, they are more likely to stay engaged and renew, because they see the value of the networking that our Association offers!

## What do you think is the biggest challenge your members face in their own companies?

Workforce shortages – hands down. There are just not enough workers going into the skilled trades, which means many of our business owners are finding themselves back out in the field or pushing back projects because they are booked so far out and just don't have enough employees to do the work.


**Are there any “lessons learned” you’d like to share?**

As I’ve hired staff and had to train them for all that our association does, I try and remember to teach them the why behind things not just how to do things. If you train them on how to do things that is great and all, but if you take the time to tell them we do it this way because of this, I find that they really understand things better and they have more confidence in the tasks they do.

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

Find a mentor! I was lucky enough to have my mentor right in the office with me. My predecessor, Kathy, was always someone who took the time to show me things, tell me why we did things, what to watch for. I took any advice she gave me because she always had my best interest at heart. She showed me what a great association we had and gave me the tools to keep this association running at full speed. I can never thank her enough for all her advice! ■

*Kim is also a newly appointed WSAE board member, as our Young Professional representative.*



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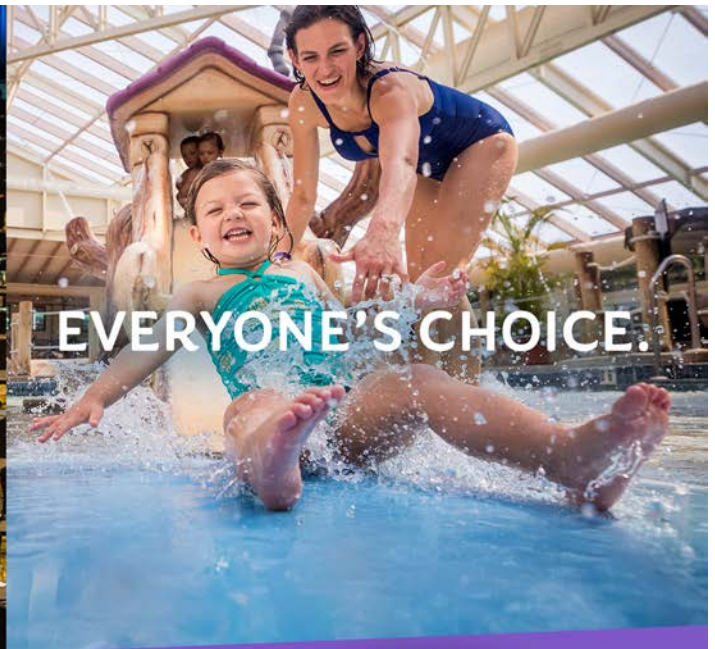
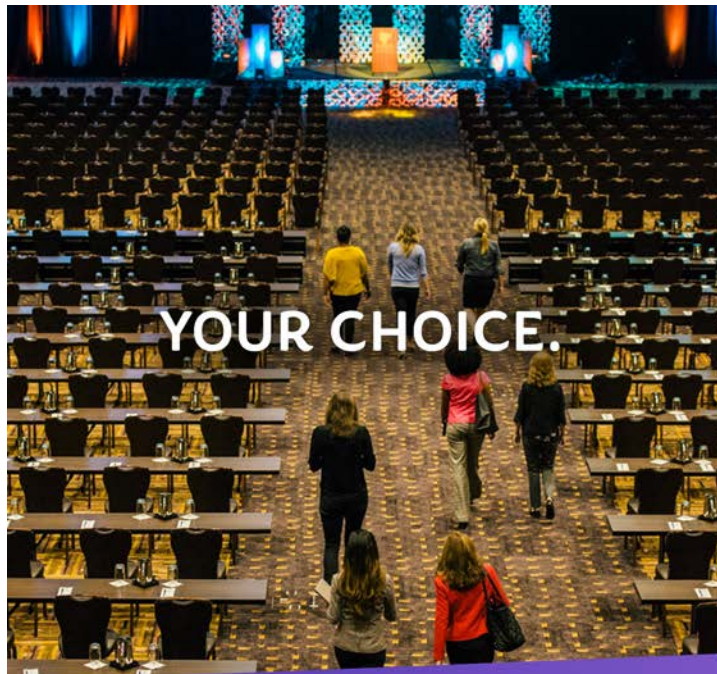
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# Keeping Up - Changing Regulation of Legislative Receptions in Wisconsin

by Mike Wittenwyler

In August, the Wisconsin Ethics Commission (the “Commission”) unanimously adopted revised guidance related to legislative *lobby day* receptions. These events are frequently held in conjunction with a trade association’s annual policy meeting, legislative day or other event when individual members are encouraged to visit the State Capitol and meet with state public officials. In many instances, the day ends with a reception where individual association members can interact with state legislators, legislative staff and other state public officials in a more social setting.

Historically, the longstanding and approved practice was for trade associations that are registered as lobbying principals to charge state public officials (including legislators and legislative employees as well as executive branch officials and employees) for food and drink served at a private reception. For example, a trade association would invite state public officials to attend the reception. On the invitation or a sign at the reception, the trade association would indicate that the cost for state

public officials to eat and drink is \$20. Any state public official who attended and wanted to eat and drink would then put \$20 in a basket or otherwise pay the host trade association. The contribution amount was determined by estimating a fair market value cost per person for the food and drink served at the event.

A revised Ethics Guideline ETH 1211 was published in the Administrative Register for notice and comment in March 2019. The Commission’s subsequent vote rejected arguments about its potentially negative legal and practical implications. ETH 1211 took effect immediately upon adoption in August 2019, resulting in changes to current practices for lobbying principals hosting legislative *lobby day* receptions.

ETH 1211 TOOK EFFECT IMMEDIATELY UPON ADOPTION IN AUGUST 2019, RESULTING IN CHANGES TO CURRENT PRACTICES FOR LOBBYING PRINCIPALS HOSTING LEGISLATIVE LOBBY DAY RECEPTIONS.

It is important to note that trade associations that are not registered as lobbying principals may continue with the practice of charging state public officials for food and drink at these events. The change only affects trade associations registered with the Ethics Commission as lobbying principals under Wisconsin law.

Under the revised ETH 1211, an official may accept food and drink at a legislative reception hosted by a lobbying principal *only* if the reception is open to the public. An official may attend a private reception hosted by a lobbying principal, but may not accept any food or drink – even if the official pays for it. Accordingly, the Ethics Commission guidance may result in lobbying principals making their events public instead of private and then providing free food and drink to state public officials instead of at cost.

ETH 1211 includes criteria for determining whether an event is open to the public, but how it applies to structuring and noticing such events is unclear. Ac-





According to the guidance, a lobbying principal has provided these items to the general public and public officials and legislative employees on the same terms when:

- They are available to anyone who wants it and who meets the criteria for eligibility;
- The criteria are:
  - Established and readily identifiable; and
  - Drawn without the purpose or effect of giving a preference to or conferring an advantage upon an agency official's legislative employee, or elective state official; and,
- There is no offer or notice of the event, item or service direct to an official that would confer an advantage to the official.

Under these criteria, it does not allow the host of a *public* grassroots advocacy day reception to invite state public officials for two reasons. First, any criteria for attendance that includes state public officials and legislative employees improperly provides a *preference* to them. Second, since the lobbying principal may not provide notice of the event to the covered state public official that *confers an advantage*, it may not email or mail invitations to covered state public officials or legislative employees since it would not be possible to email or mail invitations to every other person who fits the public criteria.

The Commission currently has no plans to promulgate an administrative rule interpreting this section of the lobbying statute.

As a result of this action by the Commission, options for trade associations that are lobbying principals at this point include:

- Structuring the lobbying day reception as *open to the public*;
- Making clear on invitations to state public officials and legislative staff that they may attend the lobbying day reception but may *not* eat or drink any of the food provided;
- Not inviting state public officials or legislative staff to lobbying day receptions; or,
- Not holding lobbying day receptions. ■



**Mike Wittenwyler** is an attorney at Godfrey & Kahn, S.C. The firm commented extensively on ETH 1211 prior to its passing on behalf of the Association of Wisconsin Lobbyists. A copy of those comments can be found at: <https://bit.ly/35SVny7>. Mike can be contacted at [mwittenwyler@gklaw.com](mailto:mwittenwyler@gklaw.com).

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# Association Policy Update

by Mary Kate Cunningham, CAE

I had the pleasure of attending the WSAE Summit this fall to give a policy update and to hear the issues that are most front-line for Wisconsin association professionals. To follow up on that presentation, I am writing to share the latest policy news.

The New Year will bring a continued period of change in Washington. With further tax legislation being debated and presidential elections approaching, it's more important than ever for the voice of association professionals to be heard. The biggest policy issues ASAE sees on the horizon for associations include potential tax changes, challenges to association certification at the state level and the continued fight to protect and promote Association Health Plans (AHPs).

## UBIT on nonprofit parking and transportation benefits

The 2017 Tax Cuts and Jobs Act (TCJA) brought many changes for associations, including a first-ever tax on fringe transportation benefits for tax-exempts. Employer-provided benefits, such as transportation, parking and on-premises athletic facilities, are subject to the tax.

Since the landmark legislation was passed, ASAE has urged Congress to repeal the 21% tax. Repeal legislation has been introduced in both the House and the Senate. Even the architects of the 2017 tax law have been on record to support repeal so that nothing distracts associations and other nonprofits from their core mission.

Repeal of this provision was passed by the House Ways and Means Committee in June, yet the tax package has yet to advance to a vote by the full House. *Update: Since this article was written, Congress repealed a section of the 2017 tax law that required associations and other tax-exempt organizations to pay UBIT on employee benefits such as parking and transportation.*

## Voluntary certification

When many state legislatures begin their work again this January, ASAE expects to see continued challenges to voluntary professional certification. Beginning in 2018, associations have seen increasing, often haphazardly written, professional credentialing reform laws across the country. The voice of association advocates has proven critical to help defend responsible credentialing practices. ASAE has monitored over 80 bills in at least 30 states this year. Association advocates have been critical in educating elected officials on the merits of certification, and

in stopping dangerous legislation in state capitals around the country. ASAE has also worked with think tanks that are influential in the field and to suggest changes to model legislation that would be more palatable for the association community.

From here, legislation may magnify in frequency and scope, as new bills will be introduced and old bills will be re-introduced. Our goal is to uphold self-regulation for private certification organizations and to ensure legislators recognize the important role of high standards set by private certification organizations for consumers, professionals, employers and licensure authorities.

## Association health plans

Associations continue to be active in the fight to support AHPs on the state and federal level. In 2018, the Department of Labor (DOL) issued a rule expanding association health plans (AHPs) as a means of helping small businesses and self-employed people get affordable health coverage. The final rule broadened the definition of an employer under the Employee Retirement Income Security Act (ERISA) to allow more groups to form AHPs as an alternative to the Affordable Care Act health exchanges. Under the final rule, AHPs can be sold nationally, in groups of states or in a single state. Since the regulation was released, ASAE's goal has been to work collaboratively with federal and state regulators to resolve remaining policy and legal uncertainties so that AHPs can operate as the DOL envisioned.

The main legal hurdle to overcome is a federal district court decision earlier this year that invalidates the DOL's 2018 rule expanding access to AHPs. The case was brought by attorneys general from 11 states and DC, who filed suit arguing the Department of Labor violated federal rulemaking procedures when it expanded small business access to group health insurance. A final ruling may not come until early next year.

While the court case plays out, ASAE's coalition has helped 10 states enact laws conforming to the DOL's AHP rule. The Coalition also secured guidance from the DOL clarifying that AHPs existing through the original pathway before the new rule were not impacted by the District Court ruling. The Coalition has also developed *best practices* for organizations currently sponsoring – or wanting to sponsor – an AHP.

## Sale of the .org registry

There are also new issues on the radar, like the recent sale of the .org registry to a private equity firm, which could greatly increase the price of association domain name registrations and renewals. In November, Public Interest Registry (PIR) announced a deal to be acquired by Ethos Capital LLC. Public Interest Registry has managed the .org domain registry since 2002. There are roughly 10 million .org domains in operation, including most web addresses used by associations.

The concern that Ethos will raise the fee to renew domain names has heightened since the Internet Corporation for Assigned Names and Numbers (ICANN), a global entity that manages the Internet's address system, took steps in June to remove the longstanding price cap of 10% for renewal of .org domain names.

ASAE is meeting with PIR, Ethos Capital, and the Internet Society to express our concerns. Still, we suggest that associations prepare for a price increase as they look to renew domain names. The ICANN contract allows existing registrants to renew their domain names for up to 10 years at current prices before price hikes take effect but ASAE believes this only delays the inevitable pricing instability to come.

## American Associations Day

With so many federal issues at stake, there is a critical need for association leaders to share their story with lawmakers in Washington. I hope you will consider joining WSAE and ASAE in Washington, DC, on March 19-20 for American Associations Day, our legislative fly-in. Experience in government relations is not needed to attend. ASAE makes it easy: we will provide training on the most effective way to share our message and provide you with resources for visiting your Congressional offices. Join to advocate for the profession and to network with association professionals from around the country. Registration is free and ASAE even provides a scholarship of up to \$300 to attend for those outside the DC area. To register visit our Power of A website at <http://www.thepowerofa.org/hillvisit/> or email [publicpolicy@asaecenter.org](mailto:publicpolicy@asaecenter.org). ■



**Mary Kate Cunningham, CAE**, is Vice President of Public Policy at ASAE.



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# Why It's Important for Associations to Understand the GDPR

by Terrance Barkan, CAE

The General Data Protection Regulation (GDPR) is Regulation (EU) 2016/679 of the European Parliament and of the Council dated April 27, 2016. It concerns the protection of natural persons regarding the processing of personal data and the free movement of this data.

Although GDPR came into law on May 24, 2016, it became legally enforceable beginning May 25, 2018. Now that we are a year and a half into enforcement, we have seen the law has real consequences for non-compliance.

Because associations maintain extensive databases of personal data, this regulation directly impacts how associations will collect, maintain and manage the data that is vital to their operations.

What is important to understand is that this regulation applies to any organization, regardless of where it may be located or headquartered, that maintains data of an EU resident, even if that is only one individual.

## What is the GDPR?

The GDPR covers the processing of *personal data* that relates to *data subjects* by or on behalf of a *data controller*.

*Personal data* is defined as any information that relates to an identified or identifiable natural person (*the data subject*). An identifiable natural person is anyone that can be identified, either directly or indirectly, by reference to anything that can ultimately identify them. This includes a name, an identification number, location data, an online identifier or data that relates to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person.

Based on this broad description, it is clear that much of the types of data that associations hold on their members, prospects, former members, sponsors, donors, meeting participants etc. would be considered as *personal data*. The entity who determines the purposes and means of processing is called the *data controller* (the association). This is contrasted with a *data processor* which processes personal data on behalf of the data controller (e.g. the many IT vendors associations use such as AMS Systems, registration systems, etc.).

ASSOCIATIONS MUST HAVE CONFIDENCE THAT THE THIRD PARTY SERVICES THEY USE TO MANAGE DATA ARE PROPERLY SECURED. IF YOUR THIRD PARTY PROVIDER CAUSES A BREACH, THE ASSOCIATION WILL REMAIN LIABLE.



There are many changes for data processors under the GDPR, with many of the contractual obligations on them having been placed on a statutory footing. In practice the distinction between a *data controller* and a *data processor* is often not easy to ascertain.

## What is the difference between a *data controller* and a *data processor*?

One way of looking at this is using the example of an association that outsources its IT services to a third party (think of an online database management application). This is not an unusual situation, especially for many associations that outsource the hosting of their websites and that may have an online membership directory as one component.

The association in this case would be considered the *data controller* because the association maintains *control* over the data (it is collected, maintained and manipulated at the direction of the association). The third-party service provider(s) would be considered a *data processor* because they have access to the data through the provision of their IT services.

## What are association responsibilities?

The *data controller* bears the responsibility to prove to the relevant supervisory authority that it is properly following the guidelines and regulations regarding the acquisition and management of personal data.

These regulations include the following principles regarding the handling of personal data:

- **Lawfulness, fairness and transparency:** Personal data must be processed lawfully, fairly and in a transparent manner.
- **Purpose limitation:** Personal data must be collected for specific, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes.
- **Data minimization:** Personal data must be adequate, relevant and limited to what is necessary in relation to the purposes for which it is processed.
- **Accuracy:** Personal data must be accurate and, where necessary, kept up to date. Personal data that is known to be inaccurate is to be erased or rectified without delay.
- **Storage limitation:** Personal data must not be kept in a form which permits identification of data subjects for longer than is necessary.
- **Integrity and confidentiality:** Personal data must be processed in an appropriately secure manner including protection against unauthorized or unlawful processing and against accidental loss, destruction or damage, by the use of appropriate technical or organizational measures. Note that this is where associations must have confidence that the third-party services they use to manage data are properly secured. If your third-party provider causes a breach, the association will remain liable.
- **Accountability:** The data controller is responsible for, and has to be able to demonstrate compliance with, the principles stated above.

Regulation and enforcement of the GDPR is performed by a country's *supervisory authority*, which in some countries may include data regulators at a national as well as regional or local level.

In addition to the principles listed above, *data controllers* (associations) must also meet at least one the following criteria;

- **Obtain consent:** The data subject must give clear consent to the processing of his or her personal data for one or more specific purposes.
- **Performance of a contract:** Data processing is necessary for the performance of a contract with or on behalf of the data subject. For associations,

membership and the delivery of services can be considered a contract. *Necessary* is a key element here, however. Regulators and the courts are likely to interpret this narrowly, and convenience is not the same as a necessity!

- **Compliance with a legal obligation:** Data processing is necessary for compliance with a legal obligation to which the *data controller* is subject. Again, this is a narrow criteria and a U.S. legal obligation is unlikely to be sufficient.
- **Vital interests:** Data processing is necessary in order to protect the vital interests of the data subject or of another natural person.
- **Public interest:** Data processing is necessary for the performance of a task carried out in the public interest or in the exercise of an official authority vested in the *controller*. To meet this requirement, it is likely to be in the interest of the public in the relevant member state – U.S. public interest will not be sufficient.
- **Legitimate interests:** Processing is necessary for the purposes of the legitimate interests pursued by the *data controller* or by a third party, except where such interests are overridden by the interests or fundamental rights and freedoms of the data subject which require protection of personal data, in particular where the data subject is a child.

## The importance of consent vs other legal basis

Obtaining proper consent from your data subjects is one of the most important aspects of compliance with this new regulation. The definition of what constitutes proper consent has changed under the GDPR.

Consent in the GDPR is defined as: *any freely given, specific, informed and unambiguous indication of the data subject's wishes.*

Specifically, consent needs to be given by a clear affirmative act, such as by a written statement, including electronic means, or an oral statement, which demonstrates a data subject's agreement to the processing of personal data relating to him or her.

It is important to note that *silence, pre-ticked boxes or inactivity* do not establish consent.

Please be aware that consent is not the only basis and in many cases, you will want to use an alternative, such as a contractual relationship, as a stronger legal basis for your data processing.

The data subject does not need to give his or her consent again if the original consent was obtained in line with the conditions detailed in the GDPR.

It should also be noted that associations will need to give members and other data subjects the ability to withdraw consent in a manner that is as easy to withdraw as it is to give consent, just one of the reasons that obtaining consent is a last, and not a first method of choice when other options exist.

### What are the penalties for non-compliance?

Each supervisory authority has a range of investigative, corrective, authorization and advisory powers in order to ensure compliance with the GDPR. A supervisory authority has the ability to:

- Issue warnings.
- Order the data controller or the data processor to comply with a data subject's requests to exercise his or her rights under the GDPR.
- Order the data controller to communicate a personal data breach to the data subject(s).
- Impose a temporary or definitive limitation including a ban on processing.
- Order the correction or erasure of personal data or restriction of processing pursuant to a data subject's rights.
- Impose an administrative fine.
- Order the suspension of data flows to a recipient in a third country or to an international organization.

In addition, fines can be imposed, in addition to or instead of the corrective powers a supervisory authority has at its disposal. The potential levels of these fines is quite staggering.

- A fine of up to €10,000,000, or in the case of an undertaking, up to 2% of the total worldwide annual turnover of the preceding financial year, whichever is higher.
- A fine of up to €20,000,000, or in the case of an undertaking, up to 4% of the total worldwide annual turnover of the preceding financial year for the most severe forms of a breach, including violations of:
  - The basic principles for processing, including conditions for consent,
  - The data subjects' rights,
  - The transfers of personal data to a recipient in a third country or an international organization, or
  - Non-compliance with an order or a temporary or definitive limitation on processing or the suspension of data flows by the supervisory authority.

### What next?

This article is meant to give a very brief overview of some of the most important elements of the GDPR. There are many more details to be considered regarding the rights of data subjects and how data controllers (associations) must act when acquiring, storing, managing and deleting personal data.

Associations will need to get proper legal compliance advice when it comes to the GDPR implementation. Because associations collect and manage data through multiple platforms (database management systems, websites, event registrations systems, members-only networks, etc.) the range of exposure can be higher than imagined.

We recommend that associations (and IT vendors that serve associations as data processors) conduct a GDPR GAP Assessment to benchmark their current practices against the GDPR regulations. This will help to identify those areas where your organization may be non-compliant and where corrective action is required. ■



**Terrance Barkan, CAE**, is Chief Strategist at GLOBALSTRAT. For more information on the GDPR and Data Protection Information services, including GAP Assessments, feel free to contact Terrance Barkan at [tbarkan@globalstrat.org](mailto:tbarkan@globalstrat.org).



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# Cultivate Productive and Positive Relationships on Your Board

Understand what motivates others and appreciate different personalities

by Tina Hallis, Ph.D.

Have you ever noticed that one of the most important factors determining our success at work and our overall well-being is the same thing that causes us considerable amounts of stress and frustration? What is it? It's our *relationships*! You can imagine that at work, our relationships are essential for our motivation, for effective teamwork and collaboration and for our ability to connect with our customers. When it comes to our overall well-being, studies have shown that one of the most important factors is the strength of our relationships. In fact, having strong social connections has even been associated with better health and longer life.

Yet, these interactions are not without their challenges and issues. For example, think about the people on your board of directors. Does someone on your board annoy you? Do you annoy someone else?

*Cindy: "Why does Joe take so long to make a decision? It drives me crazy!"*

*Joe: "Cindy is so pushy! She's in such a hurry to get things done that she misses important details."*

This might be the type of reaction we have (at least in our minds)

WE DON'T *OBSERVE* THE WORLD AROUND US. INSTEAD, EACH OF US INTERPRETS THE WORLD BASED ON OUR OWN UNIQUE PERSPECTIVE THAT'S SHAPED BY A VARIETY OF FACTORS SUCH AS LIFE EXPERIENCES, TRAINING AND CULTURE.

when the other person has different preferences and priorities than we do. It's actually a normal response based on how our brains are wired. When we interact with someone who has a different perspective, our brains signal "DANGER!" This *social* threat registers as a real physical danger and can cause us to become defensive, suspicious and distrusting. These types of reactions can cause all kinds of problems with our ability to effectively connect, communicate and collaborate with our board members.

It turns out that we don't *observe* the world around us. Instead, each of us interprets the world based on our own unique perspective that's shaped by a variety of factors such as life experiences, training and culture. Another area that plays a major role in how we see the world is our personality or personal style. Different personalities have different preferences and priorities that affect how we communicate, behave and perceive each other.

To cultivate productive and positive relationships, we need to understand what motivates others, how they're feeling and what they might be thinking. Essentially, it's helpful to try to see things from *their perspective*. Understanding our own personal style and the style of the other person goes a long way towards bridging that gap.

Here's a quick way to estimate your main personal style using the Everything DiSC® approach. Answer the two questions below to decide whether your main style is likely to be *Dominance*, *Influence*, *Steadiness*, or *Conscientiousness*.

1. In most situations, would you say you're more comfortable being *fast-paced* and *direct* or *thoughtful* and *cautious*? Think about your behavior in several different situations, both at work and at home. If it's hard to decide, you can always ask someone you trust.
2. In most situations, would you say you're more likely to be *task-oriented* and *skeptical* or *people-oriented* and *accepting*? Again, think about your tendencies in several different situations, both at work and at home. If it's hard to decide, ask someone you trust.





If you answered fast-paced and direct and task-oriented and skeptical, you are likely to have a **Dominance** style, which is assertive, results-oriented, direct and all about action.

If you answered fast-paced and direct and people-oriented and accepting, you are likely to have an **Influence** style, which is outgoing, enthusiastic, lively and very social.

If you answered thoughtful and cautious and people-oriented and accepting, you are likely to have a **Steadiness** style, which is patient, tactful, supportive and even-tempered.

If you answered thoughtful and cautious and task-oriented and skeptical, you are likely to have a **Conscientiousness** style, which is reserved, analytical, systematic and focused on accuracy.

You can also use these questions to predict the likely style of other people so you can better understand their priorities and adapt your style for more effective interactions.

Please be aware that personality categories should never be used as a label, but instead, they are a place to start a conversation. It's also important to recognize that one person's preferences are not better or worse than another's. They are just different approaches to how we view the world:

- Instead of taking Cindy's bluntness personally, you appreciate her focus on getting things done.

- Instead of getting frustrated with Sarah's optimism, you recognize the energy she brings to a situation.
- Instead of feeling that Joe is too quiet and skeptical, you value his attention to detail and quality.
- Instead of getting irritated that Tom won't make up his mind, you realize that he wants to make sure everyone gets a chance to share their opinions.

So the next time you're interacting with your board, and you start to feel frustrated with one of the members, see if you can guess their personal style. Then think about the preferences that go with that style. How can you choose a response that will accommodate their style and provide the best outcome for you, the other person and your organization? ■



**Tina Hallis, Ph.D.**, is a professional speaker, author, and founder of The Positive Edge (thepositiveedge.net). Her company is dedicated to helping individuals and organizations increase their positivity to improve the quality of people's work lives and the quality of company cultures. She is certified in Positive Psychology, an authorized partner for Everything DiSC®.

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# Build Winning Teams

## What C-Suite Leaders Need to Understand

by Joe Kiedinger

You know from experience that workplaces are changing. You've probably been responsible for navigating at least some aspect of that change. We've seen a shift from the Industrial Revolution to the Information Age to the Digital Age. From an emphasis on mechanization, production efficiencies and assembly lines to full automation and having resources at the touch of a button. There's a greater importance placed on culture and a desire from the workforce to make an impact and contribute to a bigger cause. Employees are longing for change—for a reversal of the isolation caused by our dependence on technology to a focus on real relationships.

**YOUR CHALLENGE AS A LEADER IN TODAY'S CONNECTION AGE IS TO DIGNIFY YOUR EMPLOYEES—TO TRULY VALUE THEM FOR THEIR STRENGTHS, CONTRIBUTIONS AND CAPABILITIES BECAUSE OF WHO THEY ARE AS PEOPLE. DIGNIFIED EMPLOYEES ARE MORE LIKELY TO BE ENGAGED IN THEIR WORK AND ARE LESS LIKELY TO LEAVE.**

### Welcome to the Connection Age

The Connection Age is marked by the desire for interpersonal connection and a feeling of emotional safety in the workplace. It's people over profits and meaning over money. *Just show me you care.* That means organizational health and culture are more important than ever when it comes to building strong teams who stay engaged and invested.

Many have heard of Maslow's Hierarchy of Needs—the five levels of human needs—from physiological at the base of the pyramid to self-fulfillment at the top. The Employee Hierarchy of Needs follows a similar model.

Level one of the Employee Hierarchy is Financial Needs, to be fairly compensated. Next are Physical Needs, to have the proper tools and systems in place to do one's job. Emotional Needs, appreciation, and Respect, being respected for what one does, are the next levels of the pyramid. At the top is Dignity. It's what many workplaces strive for but are missing.

Your challenge as a leader in today's Connection Age is to dignify your employees—to truly value them for their strengths, contributions and capabilities because of who they are as people. Dignified employees are more likely to be engaged in their work and are less likely to leave.

### The importance of purpose

Rallying your team around a central purpose is essential to give everyone clarity as to how they fit in. Your purpose should be what makes you unique, relevant and compelling. What do you do that's special? What's your message to your team and your customers? Simon Sinek says it best in *Start with Why*: "People don't buy what you do; they buy why you do it. And what you do simply proves what you believe."

### Knowing your authentic self

How do you become the leader you're capable of being—one who's able to communicate your purpose effectively and foster a dignified team environment—if you don't truly know yourself? Self-awareness and, ultimately, self-acceptance allow



**BETTER RELATIONSHIPS.  
BETTER BUSINESS.**

**JOE  
KIEDINGER**

Organizational Health & Culture Expert

"Corporate culture is a difficult topic to teach. Particularly through large organizations with multiple levels of education and experience. Joe does a great job of creating urgency and importance around culture."

—Leadership workshop attendee

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you to free yourself from your personal biases and quell the negativity to which you're naturally predisposed. The result? The ability to speak and act authentically. There is no greater respect that you can show your team than to be direct and honest. Accepting yourself gives your team the freedom to accept you and it strengthens the bonds between.

**You all fit into your purpose**

Knowing what you're best at allows you to connect deeply with your purpose and identify where you fit into the larger picture. If you can achieve that level of clarity within, you'll be able to help your team do the same. Part of having a dignified culture is accepting and appreciating your teammates for exactly who they are and what they're able to bring to the table. That includes identifying how they fit in to your purpose.

**Connection in the Digital Age—Do life together**

Gone are the days of leaving your baggage at the door. It's a myth that you can't be friends with or have a personal connection to your team. In fact, it's authentic connections that make your team stronger. Let's face it, when something unpleasant happens to us, it can be hard to hide. People notice. If you see employees who seem stressed or worried, ask why. Invest in people's lives and honor their feelings. Maybe a younger employee is buying their first home and is struggling with the process. Share your experiences and be a great mentor. Getting to know people gives you the chance to do life with them. As leaders, try hard to approach your team with this mindset. Real progress and teamwork can be achieved through simple human connection.

**Practical steps to build your winning team**

Research on organizational health has come a long way in recent years, and has helped to distill down to the key things you'll need to improve your organizational health and create the most successful team. It's not hard, but takes a real commitment to a manageable process, adopting technology that promotes accountability and leaders staying on track. It's time to start building better relationships and better business. ■



**Joe Kiedinger** is an Organizational Health and Culture expert and founder of Prophit. He works with leaders to transform their lives both at work and at home using Prophit's proprietary and patented Dignify system—making a healthy culture at your organization teachable, trackable and sustainable. Prophit is a communication company that focuses on organizational health.



*WSAE's 2019 Summit enjoyed record registration/attendance levels and featured a brand-new meeting space, as well as new and different features that contributed to a high level of fun and engagement. Thank you to everyone who contributed and participated. Revisit this year's Summit on WSAE's Facebook page, in the 2019 WSAE Summit photo album.*

**Thank you to our event sponsors!**



# Congratulations!

Meet the inspirational WSAE 2019 award winners, who were recognized during the Awards Lunch at the 2019 WSAE Summit

## YOUNG PROFESSIONAL AWARD

### Jennie L. S. Socha, CAE Executive Director, Inc.



As a young professional and millennial, Jennie has contributed to the association management field on the local, state, national and international level. First of all, Jennie is a successful association professional. For the past four years, she has served as the executive director of the International Parkinson and Movement Disorder Society. During her tenure with this organization, membership has increased by 109% to 9,400 members, the staff has increased by 62% to 34 full-time staff members and the budget has increased to over \$11 million annually. Previous to her current position, she has served in a number of roles, including executive director, with the World Allergy Organization. As a member of the Executive Director, Inc. staff team, she serves as a mentor and role model to others. She participates in internal EDI leadership groups that identify ways to better serve associations and staff.

On a local/state-wide level, Jennie spoke at the 2016 WSAE spring meeting on governance issues, she assisted with planning the 2017 WSAE Executive Exchange and she currently serves on the WSAE Education Committee. On the national level, Jennie was selected as a participant in the 2013 ASAE NextGen Association Summit and spoke at the 2014 ASAE annual meeting. In 2018 Jennie received both the 40 under 40 for Association Forum/USAE and the Connect 40 under 40. On an international level, Jennie represented the AMC Institute at the IBTM meeting in Barcelona.

Jennie epitomizes the role of servant leader and is always willing to help other staff members of any age to grow professionally. Jennie demonstrates commitment, dedication and involvement in the association industry. ■

## VISIONARY AWARD

### Tony Veroeven AMPED Association Management



Tony Veroeven has shown outstanding commitment to innovation and leadership. “Tony would be great for that.” is what comes to mind for Tony’s nominator, Emily Petersen, at least once during every conversation she has with a potential client. Whether they are just getting into marketing automation, want to launch a podcast or simply want to grow their membership—Tony is always the first person that comes to her mind. He can take any idea—big or small—and run with it: figure out how to make it work within any budget and timeline.

For one client, he was able to figure out how to use the free or very inexpensive versions of a CRM and an integrated chat feature on a website to pull in new membership leads and upsell other programs and services. The revenue he generated from doing so was used to invest in the paid versions and continue to grow the organization. Tony is not one to be wary of learning new technology or tools, and thoroughly enjoys learning a new skill and then sharing it with others. He is an outstanding team builder who takes the time to mentor interns and staff on everything from webinar hosting to website analytics. He clearly enjoys sharing his knowledge for the greater good.

Tony has become the resident podcast expert at AMPED, launching programs from scratch for two clients. His first endeavor gained 500 subscribers and 12,000 downloads in the first six months. Outside of his day job, Tony gives his time as a Boy Scout leader and is the President-Elect of the Madison Chapter of the American Marketing Association—just another testament to his dedication to being a mentor to those around him. ■

ASSOCIATION LEADERSHIP

## Marc Cohen

### Wisconsin EMS Association

Our Association Leadership Award is given to an individual or organization that demonstrates leadership through one or more of the Values of WSAE – inclusion, optimal performance, alliance-building and passion.

Since Marc Cohen became Executive Director of the Wisconsin EMS Association (WEMSA) in 2016, he has pushed the association to a new level. His nominator, Alan DeYoung, said that WEMSA was previously an association that would look internally and operate independently, never including other associations or building partnerships with other organizations. When Marc entered the picture, all that changed. He facilitated the development of partnerships with the Medical College of Wisconsin, University of Wisconsin and the Department of Health Services. These partnerships included education, collaboration on projects and bettering Wisconsin communities across the entire state. It's through Marc's ability to network and build alliances with people and other organizations that WEMSA has grown from a staff of three people to seven in just two years. They have built long-term partnerships with other key state associations and continue to grow what they have done and what they plan to do in the future. Alan says that Marc has the passion to run a nonprofit association like no-one he has ever met or seen, citing 3:00 am emails as just one piece of proof of that passion for doing more for the communities the association serves. Marc's passion for WEMSA and the association community is evident to everyone around him, and is quite contagious! ■



HALL OF FAME

## Jane Svinicki, CAE

### Svinicki Association Management

Jane Svinicki has demonstrated involvement and commitment to the association management field on a continuous basis, with over 30 years of experience managing not-for-profit trade and professional organizations. She is President and co-owner of Svinicki Association Management, Inc. (SAMI), an association management firm she launched in 1986. Her company's mission is to empower non-profit organizations to succeed.

Jane is a member of the AMC Institute and the American Society of Association Executives, where she is currently the immediate past Chair of the Association Management Company Advisory Council. She also serves on the Marquette University College of Communication Advisory Board.

She is the 2018 recipient of the Wisconsin Governor's Trailblazer Award. Jane was recognized in the Business Pioneer Award category acknowledging companies that have been majority woman-owned for the past 25-years or more.

Jane says, "Like most entrepreneurs, I started small, working from home. My vision for the company was that better management would help non-profits achieve their goals. My company currently has 17 staff and 20 client organizations. It has been a privilege to serve our clients, who are some of the most dynamic, intelligent, and visionary volunteers in their respective professions." ■



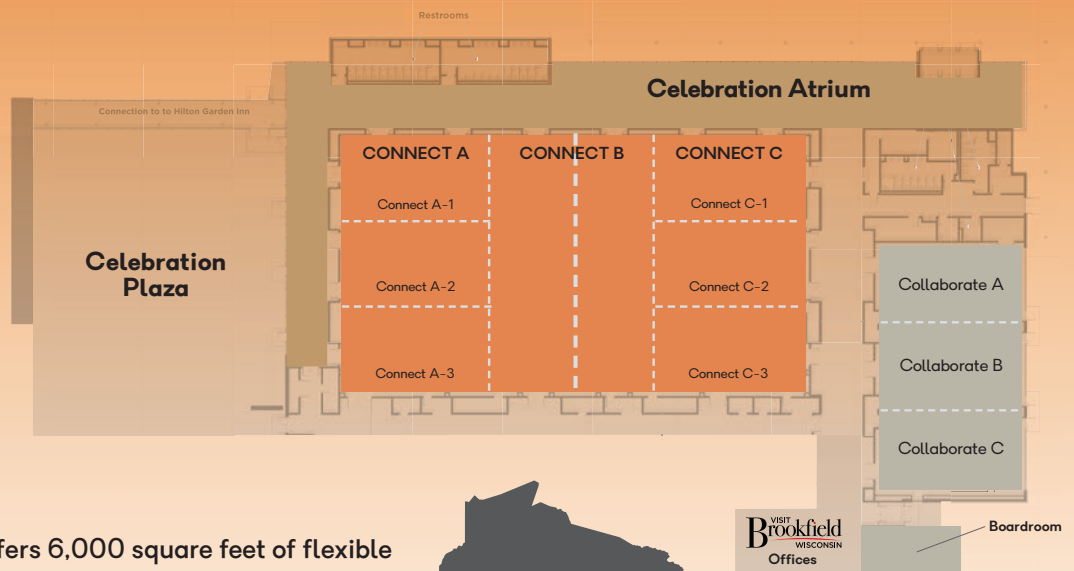
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# Take Advantage of Professional Development Opportunities

## IOM Winter Institute scholarships available

WSAE is again proud to partner with Institute for Organization Management, the U.S. Chamber of Commerce Foundation's professional development program for non-profit executives, and offer four \$500 partial tuition scholarships to one of Institute's 2020 sites. The four scholarships, available to our members, will be awarded to students attending Institute for the first time to assist with enrollment fees and cannot be combined with any other Institute scholarships. Please note, this can be combined with the Premier Investor Discount (PID) and/or Group Rate.

For almost 100 years, Institute has educated association, chamber, and other nonprofit leaders across the country through its national program, highly rated curriculum and high-caliber instructors. Thousands of executives have attended Institute sites across the country to strengthen their management skills, learn industry best practices and gain a broad national perspective from peers. Institute has helped

them build stronger organizations, become stronger business advocates and better serve their members. In addition, you will earn points towards your CCE or CAE as Institute's curriculum is directly tied to the bodies of knowledge of both industry certifications.

Upon completion of the Institute program, graduates receive the IOM recognition which allows them to use the letters "IOM" in public mention and professional correspondence. The IOM recognition signifies the completion of 96 hours of course instruction in nonprofit management and commitment to the industry.

If you are interested in this scholarship opportunity, contact Michelle Czosek ([mczosek@wsae.org](mailto:mczosek@wsae.org)) by **March 27, 2020**, for Midwest Institute (offered June 7-11 in Madison, WI). For more information about Institute's curriculum, sites, and dates, visit the Institute web site at [institute.us-chamber.com](http://institute.us-chamber.com). ■

## CAE online preparation courses available

WSAE, through partnership with the Michigan Society of Association Executives (MSAE), is offering CAE preparation courses that incorporate study guides, reading comprehension questions, flashcards and practice tests. With three different courses, there is an option to fit everyone.

Options available:

- **Full Course.** Ideal for individuals new to the CAE.
- **Concentrated.** Ideal for ASAE Immersion Program participants or those that have started the CAE process.
- **Cram Session.** Ideal for individuals that have previously taken the course or exam.

In addition to CAE prep courses, MSAE also offers a virtual prep course to prepare for the CMP examination. MSAE is offering their Member Rate to WSAE members, which represents a \$100 savings. Also, please ensure that you notify MSAE of your WSAE membership—WSAE receives 10%! Register online at [www.msae.org](http://www.msae.org) or contact MSAE at (517) 332-6723. ■

## WSAE member Dana Murn wins CAE scholarship

Dana Murn of American Academy of Cosmetic Dentistry has been awarded WSAE's Certified Association Executive Scholarship Award. The CAE Scholarship is a \$500 award used to help cover expenses of sitting for the CAE exam, which can get costly when you consider the exam fee, study materials and study group fees. Anyone who has been a member for at least one year and is eligible to sit for the exam within the next calendar year can be considered for this award. Review criteria includes financial need as well as WSAE engagement. Dana has been an active WSAE member, and was even the first winner of WSAE's Young Professional Award! She was recognized at the WSAE 2019 Summit during the Awards Lunch. ■





## VISIT Milwaukee names Peggy Williams-Smith as new President & CEO

After a national search, VISIT Milwaukee has named Peggy Williams-Smith, Senior Vice President of Marcus Hotels & Resorts, as its new CEO, effective November 18. Williams-Smith replaces Paul Upchurch, who is leaving to pursue other opportunities.

Williams-Smith was selected from a national field of candidates in a months-long search, headed up by Omar Shaikh, Chair of the VISIT Milwaukee Board of Directors. She is the first woman to lead the organization.

“Peggy is well-known in the Milwaukee community as a leader and as a woman who makes things happen, so she was a natural choice for the role,” said Shaikh. “Ultimately, the search committee was impressed with her vision for VISIT Milwaukee and her passion for the destination.”

Williams-Smith is a lifelong Milwaukeean, proud UWM Panther, and has honed her hospitality skills at Marcus Corporation since 1997. She has co-chaired the citywide UPAF campaign and is a member of Professional Dimensions and TEMPO Milwaukee, and the Milwaukee Business Journal named her as a “40 under 40” winner in 2010 and a “Woman of Influence” in 2017.

“I could not be more excited to take the reins at VISIT Milwaukee as we go headfirst into a very busy and exciting year, featuring national events such as the DNC, the USA Triathlon, The Ryder Cup, and the 140th Annual Meeting of Northwestern Mutual Agents,” said Williams-Smith. “It is an honor to be selected to lead this organization into the next decade. I look forward to working closely with the dynamic team at VISIT Milwaukee, Marty Brooks and the Wisconsin Center District, and the hospitality community to make 2020 a banner year for our city.” ■

### Brag a little bit!

Let us help spread your good news - Send your news to Kristin at [kmcguine@wsae.org](mailto:kmcguine@wsae.org), and we will include it in future issues of *VantagePoint* magazine. Please note that there is no additional cost to this promotion - It is included as a benefit of your WSAE membership. ■



## Osthoff Resort nabs #5 ranking in "Top Resorts in the Midwest" in 2019 Conde Nast *Traveler* magazine's Reader's Choice Awards

Wisconsin's Osthoff Resort moved up nine spots to grab the #5 ranking in this year's Condé Nast Traveler Magazine's Readers' Choice Awards in the category of Top Resorts in the Midwest. Readers voted on their favorites, rating a property's rooms, service, cuisine, location, activities and value. For more on this landmark resort located on the shores of Elkhart Lake, log on to [www.Osthoff.com](http://www.Osthoff.com).

This is the 32nd year for the awards, making it the longest-running recognition of excellence in the travel industry. More than 600,000 Condé Nast Traveler readers submitted a record-breaking number of responses, rating the travel experiences they admired most. Especially impressive for all the winners is the fact that just 15 percent of the nearly 10,000 hotels, resorts and destination spas rated made the cut.

“This is an honor we cherish because it comes from the readers and because we know how very competitive it is,” said Lola Roeh, general manager of The Osthoff Resort. “As we look ahead to 2020 and our 25th anniversary, it's that high standard of gracious hospitality that we'll continue to live by in our work and celebrate with our guests.”

The Osthoff Resort is known for its pristine lakeshore setting, distinctive architecture with lakeview balconies, spacious suites, award-winning Aspira Spa and an impressive collection of amenities including three restaurants, a cooking school, gift boutiques, indoor and outdoor pools, lake deck with live music, and elegant ballrooms and meeting venues. ■





*As of December 15, 2019*

## Association Acumen achieves fourth AMCI accreditation

Association Acumen, a full-service association management company based in Menomonee Falls, Wisconsin, was recently re-accredited by the Association Management Company Institute (AMCI). Among 500-plus Association Management Companies (AMCs) worldwide, only 81 have achieved AMCI accreditation (16%), demonstrating the commitment and the ability to deliver the highest level of professional management services to association clients. AMCI is the global trade association for the association management industry. AMC Institute Accreditation is recognized and supported by the American Society for Association Executives and is based on the American National Standards Institute Standard of Good Practices for the AMC Industry.

In order to become re-accredited, Association Acumen had to undergo a stringent evaluation by an independent auditor, who reviewed its operating policies and procedures onsite. Originally accredited in 2008 and then re-accredited in 2011 and 2015, Association Acumen continues to demonstrate proficiency in areas like client contracts, financial controls, insurance requirements, employee selection, evaluation and training, subcontracting and record keeping. Keeping quality high is mandatory, since AMCs must earn re-accreditation every four years. ■

## The Fox Cities CVB awarded state tourism grant to support a new brand campaign

The Fox Cities Convention & Visitors Bureau has been awarded a Wisconsin Department of Tourism joint effort marketing (JEM) grant to support its launch of the Fox Cities Originals in 2020, a promotional brand campaign to draw visitors, increase economic impact and showcase the Fox Cities as a dynamic destination.

With help from a \$39,550 Year-1 Joint Effort Marketing (JEM) Grant from the Wisconsin Department of Tourism, the Fox Cities Convention and Visitors Bureau (FCCVB) will launch the Fox Cities Originals, an exciting promotional brand campaign to draw visitors and increase economic growth. The campaign will launch in January, playing up Fox Cities' greatest strengths: truly unique activities, attractions, eateries and shops; an amazing lifestyle; and the people and the companies that make the Fox Cities such a dynamic destination. ■

**Noonie Aguilar**, DuPage Convention & Visitors Bureau  
**Emily Bardach**, AMPED Association Management  
**David Barrett, JD, MS**, Executive Director, Inc  
**Madeline Behringer**, Stoney Creek Hotel & Conference Center  
**Andrew J. Bronson, CAE**, Svinicki Association Management Inc  
**Erik Burns, EDD, MA, MBA**, American Association of Pharmaceutical Scientists  
**Michael Doers**, Town Bank  
**Anniekay Erby, MBA, CAE**, Executive Director, Inc  
**Kim Frisch**, AMPED Association Management  
**JJ Giese**, Thyssen  
**Shaun Gleason**, Metropolitan Builders Association  
**Emily Gooding**, Visit Seattle  
**Brandon Hamilton**, Executive Director, Inc  
**Steven Idzikowski**, ASQ  
**Melissa Kabadian, MA, CMP**, Conference Direct  
**Claire Leischer**, Executive Director, Inc  
**Amy Motyka**, AMPED Association Management  
**David Nelson**, Metropolitan Builders Association  
**Katie Neubauer**, American Academy of Cosmetic Dentistry  
**Marie Odden**, Svinicki Association Management Inc  
**Janine Osborne**, The Ridge  
**Laura Ransone**, AMPED Association Management  
**Erin Roosa**, AMPED Association Management  
**Kate Rudolph**, Executive Director, Inc  
**Trevor Schachner**, AMPED Association Management  
**David B. Schade**, First Business Bank  
**Sandy Schueller**, Svinicki Association Management Inc  
**Tricia Snider**, D2L  
**Alexandra Videmsky**, Executive Director, Inc  
**Jaime Voss**, Town Bank  
**Jim West**, Town Bank  
**Leah York, CAE**, Talbott Talent



# Membership Plus One

by Michelle Czosek, CAE



In reading the Chair's Message from Kathy Raab at the front of this issue, I was inspired to learn more about *212°, The Extra Degree, Extraordinary Results Begin with One Small Change* (by Sam Parker) and the premise of the increase of one degree making such

an impact. When you take time to really consider what could be achieved by applying that to all areas of our lives and organizations, it's a very powerful idea.

What if we applied that principal to WSAE? What if everyone did as Kathy suggested in her Chair's Message and not only renewed their membership (you have your renewal notices in your hands already) but also made a commitment to join in the organization in at least one additional way. If everyone committed to their *membership plus one* and brought in one new member, attended one additional WSAE event, shared one of their organization's success stories with others, contributed once to the Connected Community, joined one committee or volunteered to handle one task - imagine what WSAE would look like at the end of 2020!

More people involved means more networking opportunities with a greater collective knowledge, more budget dollars allocated to continue to bring top-notch education to meetings and events, more member resources and continued growth and advancement for the organization. All things that will take WSAE to the next level.

Taking it one step further, what if you encouraged *your* members to operate on this principle as well. This would encourage growth in the association community which does so much good for so many people.

In addition to what we could do for WSAE and our organizations by kicking the temperature up a notch, think about what we could accomplish in our own personal lives. The impact we could have on our families, friends or a stranger that may need a simple smile or a helping hand.

And the returns that you will reap will be immeasurable.

As president & CEO, I'll be working closely with Kathy as she leads the WSAE Board of Directors through 2020. The

Board will continue to work towards the goals in the strategic plan developed during Kristina Mattson-Grimm's tenure as chair. As you plan for 2020, I encourage you to consider all the ways in which you can turn it up a degree to benefit yourself both professionally and personally.

We have a lot in store for you this year starting with the WSAE Roadshow on March 16 in Milwaukee and March 17 in Madison, a new twist on the Spring Outing which will be back in Lake Geneva this year, our 3<sup>rd</sup> Executive Exchange, our annual Summit at the new Brookfield Conference Center and opportunities to learn virtually by taking part in our webinar series.

WSAE, ourselves, is turning the heat up a degree or two, offering a couple of new member resources. We have a new online compensation survey providing real-time data that will be free to participants in 2020. Watch for additional information!

We have also begun an exciting partnership with Association Laboratory, a full-service research and strategy company that serves trade and professional associations and offers an exclusive 25% discount to WSAE Members on industry white papers, webinars, and events.

I encourage you to download the executive summary for Association Laboratory's Looking Forward™ environmental scan for the association sector. The research details trends impacting members and associations, as well as solutions to the challenges that associations are experiencing.

And don't forget about discounted CAE and CMP exam prep resources, professional development program scholarships and career headquarters. We also offer a ton of great association ideas and thought leadership through *VantagePoint* magazine and the Connected Community, not to mention the camaraderie and exchange of ideas that take place online in our community, blogs (anyone can post!) and social media.

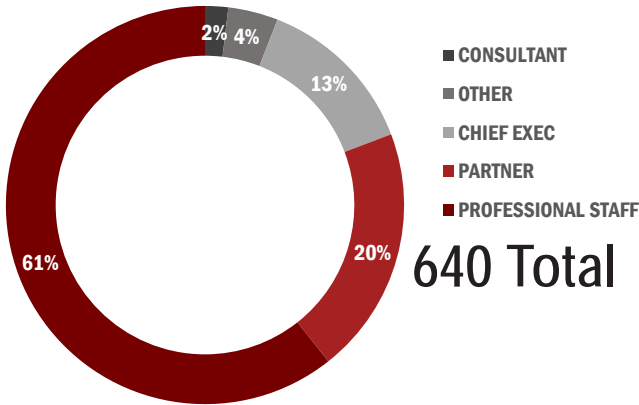
Whew! I look forward to your heightened involvement and I'd love to hear any of your ideas for turning up the heat in 2020. Please feel free to contact me any time. ■

Michelle

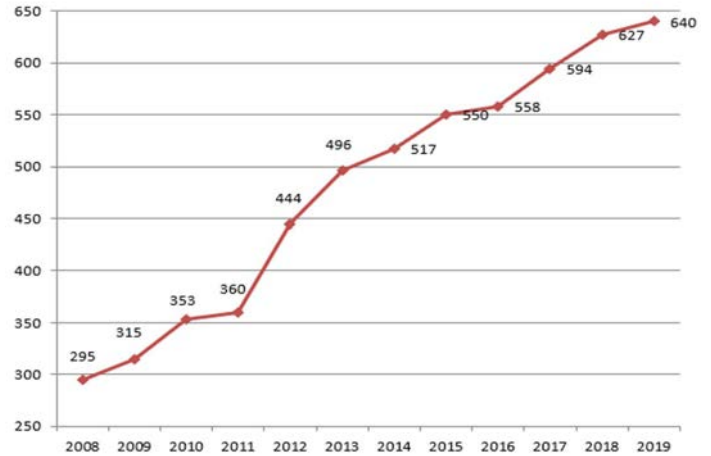


# WSAE Snapshot

## 2019 MEMBERSHIP



## MEMBERSHIP GROWTH



## 2019 BY THE NUMBERS



## SOCIAL FOLLOWS



## 2020 WSAE Annual Sponsors



When a team of San Francisco-based software gurus shared their holiday wish for a winter wonderland, we had a vision: welcome party guests to a 372,000-cubic-foot, real-life indoor snow globe scene, complete with fresh-cut, moonlit pines.

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