

COVID-19 Response Checklist

The following items were developed collaboratively with senior executives from 17 associations including professional societies, trade associations, and a global association management firm.

The purpose was to pull together a list of the primary areas the organization needs to be concerned with. The goal was to ensure the organization takes care of its members and itself while responding appropriately to the developing situation.

This framework is not meant to be comprehensive, just helpful. This does not replace legal advice, which is a necessity in these circumstances.

The checklist is divided into five categories, while acknowledging there is overlap between them all. The categories are: (1) Member Communication, (2) Meetings, (3) Vendors and Sponsors, (4) Business Model Impact and Revenue Hit, and (5) Disruptions/Silver Linings.

Your reactions, additions, and suggestions for improvement are welcome. Please email them to me at Seth@VisionaryLeadership.com

1. Member Communication

- a. Develop/fortify your strategic and urgent communications process.
- b. Review online sources and validate those that have the best information.
- c. Get info out to members as fast as possible:
 - i. Here's how to be safe
 - ii. Here are trusted resources
 - iii. Share what we are doing to be responsive to your specific needs (based on profession/trade/member profile)
- b. Manage volunteer participation, how to help not hinder (e.g., organize to be responsive, don't flood the forums with anxiety)
- c. Bring in reliable experts; make sure your spokesperson (e.g., CEO and volunteer leaders) have reliable sources
- d. Help members with their own business continuity by providing resources or webinars with experts in their space

2. Meetings

- a. Create and follow a protocol for canceling/postponing and notification of meetings. Take into account all stakeholders (participants, partners, vendors, etc)
- b. Consider using vendor's penalty payments to create benefits for the local community; e.g., food minimums go to local charities, or blocked rooms go to out-of-town families visiting patients in the hospital
- c. For mission-critical content - create templates and a process for delivering virtually
- d. Move to virtual where possible - must be adapted to different level of participation and attention span – document the process for going virtual so it can become a legitimate business process
 - i. Consider new audiences, for virtual; e.g., it could appeal to marginalized populations, those unable to travel
 - ii. Consider time zone hand offs, since people will not be co-located
 - iii. Organize watch parties - groups of people who get together to participate

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- e. Consider crowd sourcing opportunities among volunteers to identify new ways to participate
- f. Who is impacted besides the hotel and sales manager? - use this as a way to fortify long term relationship with hotel by asking hotel and other vendors to share the cost
- g. Communication is messy - this pressure has caused us to fracture as a community and pit us against each other (food service, hotel, association, etc) - Force Majeure is not working in our contracts – ask, ‘How will we come out on the other end of this in a new way to do business in contracting?’ Talk to the right people in the hotel (not necessarily the sales staff) and ask, how can we develop a new way of working together that works for us all in the long run? How can we ensure no one party bears the brunt in the short term? Take a long term view of benefiting all players (enroll them in this common goal)

3. Vendors and Sponsors

- a. Check your contracts and force majeure clauses, especially now that [the WHO has declared a global pandemic](#). Think long term partnership vs transactional, look for solutions that will sustain the relationship. Share the burden when possible, or work something out that does not impact only one party
- b. Some of our vendors do not have force majeure insurance, and are financially incentivized not to return money even if conference is cancelled - this is an opportunity to develop solutions that support your relationships for the longer term - e.g., one or the other can take the losses over a several year period rather than causing an organization to tank - time to practice core values
- c. Communicate: here's what you need to know from an event perspective, and here's what you need to know from a legal perspective

4. Business Model Impact and Revenue Hit

- a. Take a look at your contingency plan for a revenue hit. If you don't have one, make one. If you do, ask if it works in this situation and modify it accordingly.
- b. Consider your line of credit
- c. How are people, products & services impacted? How can the business model pivot to address each area?
- d. How do you shore up remaining revenues - look at timings of Account Payables and Account Receivables
- e. Consider impact on members with invoicing for dues
- f. Evaluate, eliminate or minimize discretionary spending - do it collaboratively with staff
- g. Consider how to maintain talent - avoid laying people off if possible
- h. Explore other options besides cancelling events
- i. Generationally Millennials are more comfortable with virtual meeting than Baby Boomers
- j. Consider lessening the number of in-person board meetings
- k. Engage the board in the decision-making process

5. Disruption and Silver Linings

- a. Now is the time to address longstanding opportunities
- b. Disruptions are always an opportunity for learning and innovation: collect them for after the disruption as they can be hard to track when changes are fast and furious
- c. Improve the speed of both internal and external communication
- d. Develop/fortify Business continuity plan
 - i. How best to communicate, who was responsible, agencies on retainer to help execute

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- ii. Contract updates
- e. Plan how to deal with significant staff illness
 - i. Telework
 - ii. IT network redundancy
- f. PCI Compliance - taking payments
- g. Scientific speakers need to speak for their profession – can you convert to videos and pay per view? Can you attract a bigger audience?
- h. Re-examine the value propositions of the association
- i. Manage expectations on future gathering
- j. Policy change to work with older parents and allowing staff to telecommute
- k. Review organizational structure in light of this level of disruption; are you organized for flexibility
- l. Identify the process for continuing regular operations (e.g., product development) including creating a process for how to reallocate resources with such a disruption
- m. Learn to work with the Board virtually
- n. Re-examine travel policy and consider potential cost savings for nonessential travel

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