



ASSOCIATION
FORUM
of Chicagoland®

April 1, 2014-
March 31, 2015

PROGRESS REPORT



WHO WE ARE:

The Association Forum of Chicagoland is the “association of associations” in Chicago. Founded in 1916, Association Forum has more than 4,000 members. The association community in Chicagoland represents nearly 1,600 Chicagoland associations. In turn, these organizations serve 27 million individual members, have a \$10.3 billion annual impact on the local economy and spend more than \$2.6 billion each year on conferences, conventions and meetings. Next to Washington, D.C., Chicago is the nation’s largest association headquarters city. More health care associations are headquartered in Chicagoland than anywhere else. [Read more here](#) about the power of associations.

WHAT WE DO:

Association Forum’s mission is to advance the professional practice of association management. This is done by providing essential learning, powerful resources and compelling experiences for association professionals and those who serve the association community. Association Forum produces Holiday Showcase®—the Midwest’s largest meeting sites and business services exposition—publishes the award-winning *FORUM* magazine, provides learning opportunities addressing varied needs of association professionals as they advance in their association management careers, is an approved Certified Association Executive (CAE) provider and exam administrator, and offers numerous association management tools and best practices. Learn more at associationforum.org.

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EXECUTIVE SUMMARY

Because of its valuable volunteers, loyal leaders and meaningful member contributions, Association Forum of Chicagoland was able to make significant progress on important goals that advance the association management profession during its latest fiscal year: April 1, 2014-March 31, 2015.

There were many noteworthy achievements accomplished—selecting the organization's new CEO, launching a new member appreciation event series, selling out the Women's Executive Forum, enhancing the Forum Forward experience, developing a three-year strategic plan, unveiling a new industry whitepaper, and much more.

Follow Association Forum's
path to progress in this report. >>>

Michelle Mason, FASAE, CAE, Named President and CEO



After a five month intensive search, the Association Forum of Chicagoland Board of Directors selected Michelle Mason, FASAE, CAE, as the association's new president and CEO. More than 400 inquiries were received for the Association Forum's top job. The Association Forum's Search Committee worked with a national search firm to identify qualified candidates, eventually narrowing the field to five finalists and ultimately selecting Mason.

Prior to joining the Association Forum on Sept. 15, 2014, Mason most recently was managing director, strategic developments and innovation, at the American Society for Quality in Milwaukee. Mason's responsibilities included strategically guiding work processes and systems to better align with key business objectives, designing new products for global implementation, monitoring social responsibility and sustainability of operations, collaborating with Fortune 100 companies, directing public policy initiatives, and leading diversity and inclusion efforts, among other duties.

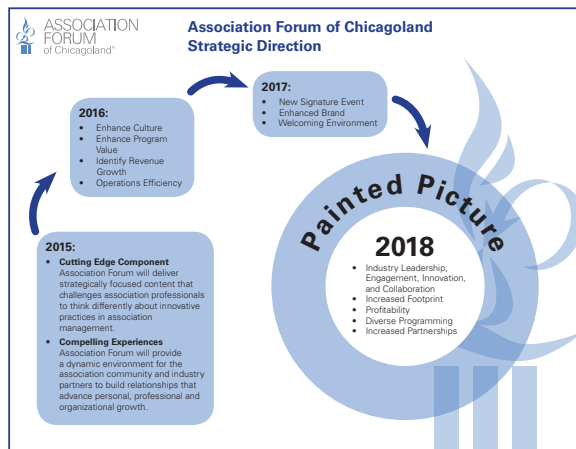
Mason also served for eight years as vice president, strategic and future-focused research, at the Washington, D.C.-based American Society for Association Executives. There, she oversaw a comprehensive research program, funded through an endowment, on future trending models and business strategies for nonprofits.



Three-Year Strategic Plan Announced

In the summer of 2014, the board of directors asked staff to elevate its strategic planning process so that Association Forum will continue its high level of professional service to members.

Driven by information gather from Michelle Mason's outreach and engagement with individual staff, board members, key CEOs, industry partners and association professionals during her first 30 days, it became evident that establishing a high-performing culture and team, as well as developing new revenue and programming, are top organizational priorities. Armed with that insight, Mason and the staff leadership team revised its strategic plan to paint a picture of the organization's future through 2018, identifying significant milestones each year.



The strategic plan will be routinely updated based on evolving environmental scans, data collection, emerging opportunities for growth and enhancement, and feedback from constituents.



Women's Executive Forum



Women's Executive Forum Sells Out for First Time

Industry executives and rising stars joined for the first-ever sold-out annual Association Forum Women's Executive Forum on Feb. 10. More than 90 current and future directors, C-suite executives and chief staff officers attended the day-long program, where they learned and shared new ideas and proven strategies for overcoming challenges and leveraging opportunities with other association executives—director-level and above. Industry leaders discussed key issues through compelling stories and powerful experiences during four sessions focused on the “confidence gap,” life at the top, executive office management, and workplace policies that help and hinder women.





Also, Association Forum began its year-long movement to engage, empower and celebrate experienced women and emerging leaders in the Chicagoland association community. It created plans to offer more women-focused content during Forum Forward and Holiday Showcase, as well as convene post-event conversation circles downtown and in suburban locations.





26th Annual Holiday Showcase Tops Recent Attendance

Holiday Showcase® on Dec. 16, 2014—the Midwest’s largest and most-attended exposition for meeting sites and business services—brought together more than 2,500 meeting planners, association professionals and supplier partners, topping the three-year high at the Hyatt Regency, Chicago. Nearly 130 CEOs and more than 1,400 qualified buyers attended Holiday Showcase 2014—representing more than half of the total attendees.

While this year marked the 26th annual Holiday Showcase, the event proved its relevancy by providing a variety of new and updated experiences for the participants. It introduced the CEOOnly® Seminar, an exclusive half-day event for CEOs and executive directors of associations. Similar to the inaugural Forum Forward, it also established the Holiday Showcase Innovation Hub, which featured more than 30 providers of business service solutions for finance and HR support, IT, marketing, communications, publishing, and cutting-edge tools such as AMS, LMS and CMS systems, mobile apps and other resources. Also, the Holiday Showcase Happy Hour was held on the show floor for the first time to maximize business opportunities between exhibitors and qualified buyers.





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Enhancements Planned for 2nd Annual Forum Forward Event

A shorter event, creative room setting, and additional content pillars were among the changes planned for the second annual Forum Forward™, June 16-17, 2015, at Chicago's McCormick Place. The event once again was being shaped to create a completely different annual meeting experience to demonstrate a focus on innovation and the overall experience of participants. Killer keynote speakers and an impressive lineup of non-industry presenters were identified, a futuristic learning format created and an exhibit space developed to push the boundaries.



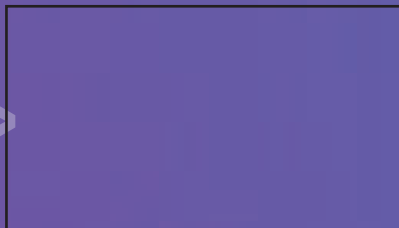


FORUM FWD™

ACCELERATE YOUR ASSOCIATION™



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video*



Among the planned changes from the inaugural event: two additional content tracks—Women's Vista and Leadership Horizons—in response to the success and growing popularity of the Women's Executive Forum and the Forty Under 40® Awards; condensed timeframe at one-and-a-half days; open floor plan in the Innovation Hub to serve not only as the exhibitors' home base but also host the general sessions, receptions and Think Tank Theaters; physical spaces that are as innovative as the topics being discussed; "genius bar"-format exhibitor space; more networking nooks; and a new learning MC to link concepts and strategies in various education sessions with attendees' day-to-day work and organizational goals.

"Association Forum aims to be a learning lab, trying out new ideas and learning experiences at the meeting," says Association Forum Board of Directors Chair Mary Lynn Fayoumi, CAE, SPHR, GPHR. "Some of them may prove to be very popular and be adopted by members at their events. Others may meet a quick demise, but that's all part of the process."



Forum After Dark Launches, Shines Light on Member Appreciation



Created with one goal in mind, Forum After Dark provides a venue to show appreciation for members. As such, throughout each year Association Forum will host these fun-filled events, rotating between city and suburban locations, to give members the opportunity to come together in a casual setting and connect with each other and with members of staff. Forum After Dark kicked off on Nov. 24, 2014, at Association Forum headquarters, followed by the April 2 spring event at the American Association of Oral Maxillofacial Surgeons in Rosemont. More events are planned for 2015.



Plans Emerge for Entering the Next Centennial

Association Forum began preparations to celebrate the centennial anniversary of its founding on Sept. 28, 1916. A Centennial Celebration Task Force has been assembled and is helping the organization reflect on what the Chicago-area association community has been able to accomplish together and the impact local association professionals have made on the industry during the past 100 years. The celebration will kick off at this year's Holiday Showcase on Dec. 17 and conclude at Holiday Showcase 2016. The Centennial celebration efforts will not only reveal historical significance of the past, but also the community's transformation into the future.

2014 Association Forum Honors Award Winners



Samuel B. Shapiro Award for Chief Staff Executive Achievement:

PATRICIA BLAKE, FASAE, CAE, CEO
of the American Society for
Gastrointestinal Endoscopy

During her tenure as ASGE's CEO, Blake has led several significant accomplishments. Staff has grown to 54 full-time staff and 12 part-time medical and event staff. The organization also has worked to redefine the art and science of hands-on training for physicians. As a result of this effort, the ASGE Institute for Training and Technology—a \$21 million, 42,000 square-foot facility located in Downers Grove, Ill., was completed and opened in June 2013. In addition to serving as ASGE's international headquarters, the IT&T conference center and bioskills lab are also being used for educational courses, endoscopy and surgical training.

Inspiring Leader Award:

JOHN STOIBER, executive vice president, outsourced services, SmithBucklin Corp.

Association Professional

Achievement Award:

MARLA ISAACS, CAE, executive vice president, Association of Nutrition and Foodservice Professionals

John C. Thiel Distinguished Service Award:

*Association Professional
Recipient*

STEVE SMITH, MS, CAE, executive director at Association Management Center and CEO of the American Academy of Hospice and Palliative Medicine

Supplier Partner Recipient

KIMBERLY PENDO, J.D., partner, Chicago Law Partners



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28 Members Pass CAE Exam

Nearly 30 Association Forum members earned the Certified Association Executive credential in 2014, successfully completing the CAE exams administered nationwide in May and December. These association leaders join more than 4,000 CAEs worldwide, who hold the prestigious credential designating those who have acquired and have demonstrated knowledge essential to the practice of association management.

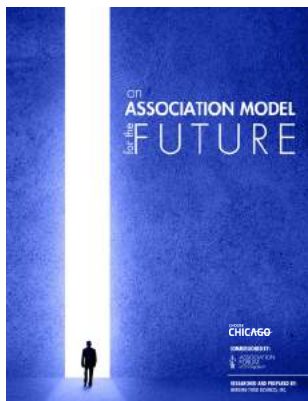
Many of these newly minted CAEs participated in Association Forum's CAE Study Course. Participants in the 2014 study course achieved an 85 percent pass rate—far exceeding the 68 percent national average! Facilitated by current CAEs, the study course meets weekly for a structured case-study series based on the nine domain areas. The 11-week study course is held twice each year, focusing on one domain per session and providing test-taking strategies, study tips and a simulated mock-exam for those preparing for the CAE exam.

[Find out more here.](#)



'An Association Model for the Future' Whitepaper Unveiled

What are the key forces that will shape member-driven organizations in the next five, 10 or more years? And, what association models successfully navigate these challenges? To answer these questions, Association Forum, in partnership with Minding Your Business and with support from Choose Chicago, investigated future trends and obstacles to association relevance. The result: overarching ideas and one dramatic demographic trend shared in [“An Association Model for the Future.”](#)



In a world that's fast becoming far more diverse, this mentality towards an association community is destructively limiting.

Dynamic association models are built on "Communities of Mutual Interest," a highly segmented community with overlapping needs and wants. It is a community of members and non-members, a community that understands the critical role played by a diversity of non-traditional members and non-members. Associations working with the Communities of Mutual Interest mentally recognize non-member association partners and exhibitors, and exclude "outsiders" of association products who maintain a transactional relationship versus a membership-driven one (see Figure 2). All the people who can benefit from a relationship with the association are part of the Community of Mutual Interest.

The difference is the looking at a drop of water with the naked eye, and then putting that drop under the microscope and finding millions of organisms living in close harmony. The diverse community lived together as mutual interests exists. It's just hard to see without the proper tools. To truly understand the diverse population that lives in the association's ecosystem, it is crucial to start with putting together all the data that exists within the organization, but often exists in multiple and segmented data silos. Putting the community under the microscope is to embrace big data and segmentation, making such foundational to the strategic planning process. The future of an association will be partly determined by its ability to manage an increasingly complex population of professionals, and understanding how and why they co-exist in a Community of Mutual Interest.

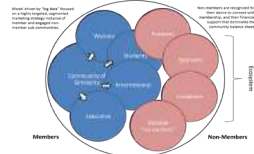
Figure 1



© An Association Model for the Future

Figure 2

The community of mutual interest is a highly segmented community with overlapping senses of mission and identified mutual interests. Not all stakeholders have every mutual need and want.



Where to Start?

As a case in point, we suggest an in-depth look at Millennials because they are the largest generational cohort since the Baby Boomers (see Figures 3 & 4). Millennials represent about one-third of today's workforce, and they are projected to be nearly 50% of the workforce in 2020. This represents more active workers than Baby Boomers and Generation X combined (Lynch, 2008). Like the Boomers, Millennials have a distinct and dominant personality that will continually demand attention and force change in the market place.

© An Association Model for the Future 7

Salute to Association Forum Volunteers

Association Forum recognizes its committees, working groups and Shared Interest Groups that help the association fulfill its mission. These volunteers, in concert with staff, made many substantial contributions to the organization and the industry during the 2014-2015 volunteer year through taking action, making sacrifices and sharing their expertise. Thank you, volunteers, for your generous giving of time, leadership, passion and commitment:

AWARDS AND RECOGNITION COMMITTEE

CHAIR: Carol Pape, CAE, Association of Professional Chaplains

CAE WORKING GROUP

CHAIR: Geoff Brown, CAE, National Association of Personal Financial Advisors

CONTENT COMMITTEE

CHAIR: Beth Zemach, Association Management Center

DIVERSITY & INCLUSION COMMITTEE

CHAIR: Burt Blanchard, Council of Supply Chain Management Professionals

FORUM EDITORIAL WORKING GROUP

CHAIR: Kathryn Dattomo, CFRE, American Society for Gastrointestinal Endoscopy; VICE CHAIR: David Westman, CAE, Westman & Associates Consulting

FORUM FORWARD PROGRAM ADVISORY GROUP

Mitchell Dvorak, CAE, Bostrom Corporation

GALA STEERING COMMITTEE

Felix Niespodziewanski, American College of Surgeons

HOLIDAY SHOWCASE EXHIBITOR & SPONSOR ADVISORY GROUP

CHAIR: Heidi Voorhees, CAE, Experient

HOLIDAY SHOWCASE PROGRAM ADVISORY GROUP

CHAIR: Cherai Lewis, CTS, YMCA of the USA

POLITICAL ACTION COMMITTEE

CHAIR: Kimberly Pendo, Chicago Law Partners LLC

PROFESSIONAL PRACTICES COMMITTEE

CHAIR: Nancy Stonis, American Association of Diabetes Educators

NO. 2 EXECUTIVES / COOs SIG

CHAIR: Kevin Menzer, Management Association

BOOK PUBLISHERS SIG

CHAIR: Michael Cunningham, American College of Healthcare Executives; VICE CHAIR: Teresa Brinati, Society of American Archivists

CERTIFICATION OF PROFESSIONALS SIG

CHAIR: Heather Rich, American Health Information Management Association; VICE CHAIR: Jeanne Schehl, Ed.D., Association of Legal Administrators

COMMUNICATIONS SIG

CHAIR: Maureen Glascoe, Virgo Words; VICE CHAIR: Jamie Birkner, American Academy of Periodontology

COMPONENT RELATIONS SIG

CHAIR: Jennifer Schlueter, IOM, Institute for Real Estate Management; VICE CHAIR: Rachel Tristano, Council of Residential Specialists

CRITICAL CONVERSATIONS FOR THE FUTURE THINK TANK SIG

CHAIR: Kenneth Luurs, CAE, (in transition); VICE CHAIR: Steve Rauchenecker, FACHE, CAE, American Dental Association

EDUCATIONAL PROGRAM DEVELOPMENT SIG

CHAIR: Susan Jankovsky, American Society for Gastrointestinal Endoscopy
VICE CHAIR: Janelle Brittain, Dynamic Performance Institute, LLC

FINANCE SIG

CHAIR: Denise Froemming, CPA, MBA, CAE, American Health Information Management Association
VICE CHAIR: Brad Neal, Academy of General Dentistry

FUNDRAISING & DEVELOPMENT SIG

CHAIR: Terri Bruce, Emergency Nurses Association
VICE CHAIR: Christine Davis, American Association of Diabetes Educators

GOVERNANCE SIG

CHAIR: Michelle Campbell, CAE, American Society of Anesthesiologists; VICE CHAIR: NICOLE BRADLE, MA, CMP, CAE, American Academy of Physical Medicine & Rehabilitation

GOVERNMENT RELATIONS SIG

CHAIR: Sam Reynolds, MBA, CAE, American Medical Association; VICE CHAIR: Jordan Wildermuth, MBA, CAE, Association Management Center

INFORMATION TECHNOLOGY SIG

CHAIR: Sherry Budziak, .orgSource; VICE CHAIR: James Gibson, American Hospital Association

INTERNATIONAL SIG

CHAIR: Holly Becker, American Society for Gastrointestinal Endoscopy; VICE CHAIR: Mollie Pillman, MS-HSM, CSSBB, American Health Information Management Association

MARKETING SIG

CHAIR: Connie Arkus, Arkus & Associates and Managing Editor of ASGE News; VICE CHAIR: Sharon Allen, ASHHRA of the American Hospital Association

MEETING PROFESSIONALS SIG

CHAIR: Jackie Bellan, CMP, American Association of Diabetes Educators

MEMBERSHIP DEVELOPMENT & SERVICES SIG

CHAIR: Josh Hayes, Commercial Law League of America; VICE CHAIR: Tom Heidrich, Society of Tribologists & Lubrication Engineers

SMALL ASSOCIATION CEOS SIG

CHAIR: Angie McKay, CAE, CFA Society Chicago; VICE CHAIR: Edward Salek, CAE, Society of Tribologists & Lubrication Engineers

SUPPLIER PARTNERS SIG

CHAIR: David Denman, DataMart Direct, Inc.

YOUNG PROFESSIONALS SIG

CHAIR: Kara Sniegowski, Society of Tribologists & Lubrication Engineers; VICE CHAIR: Jennifer Bose, Association Management Center

ASSOCIATION FORUM'S **PARTNERS** *Make it* **POSSIBLE**

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Supplier partners—who make up 16 percent of Association Forum's membership base—provide association management members with access to industry experts, trusted resources and preferred solutions—making it possible for members to meet their organizations' objectives. Through generous program and event sponsorships, exhibits, print and mobile advertising, and other support, Association Forum's partners also make it possible for it to administer high-impact learning and networking experiences for members. Partners provide everything from accounting and financial services to recruiting talent, from management software and systems to lobbying, from conference and meeting facilities to event production.

Access the [Association Forum Online Buyer's Guide](#) to source products that meet your business needs. Or, if you're an industry partner, get listed! All Association Forum supplier members receive listing with their membership. Maximize your visibility as a resource to association decision makers.



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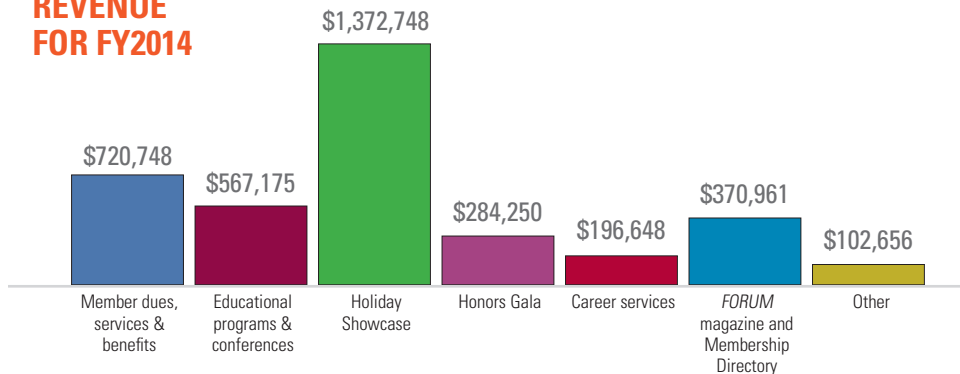


STATE OF THE ASSOCIATION

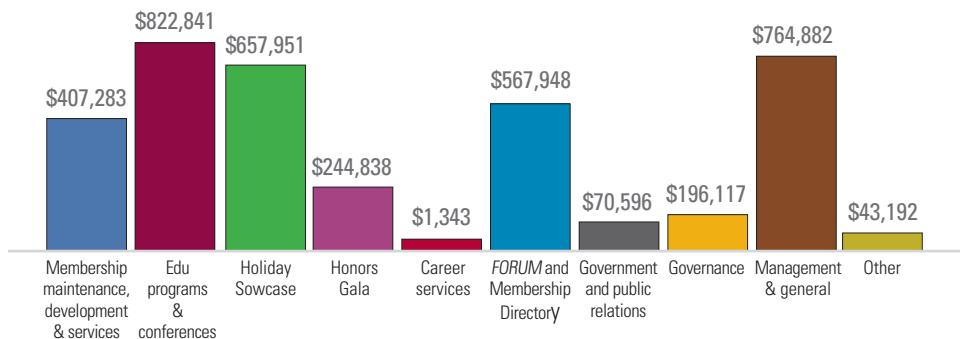
Financial Snapshot

Association Forum entered into the 2016 fiscal year poised to address the dynamic changes and challenges that are underway while continuing to invest, improve and transform the programs and services that are available to members. During 2014-2015, Association Forum was able to increase its membership, introduce new events and resources as well as produce 90 education programs. Total revenue for Fiscal Year 2015 was \$3,615,186 million—a decrease of \$326,031 over FY2014. Total expenses were \$3,776,991 million—a decrease of \$386,701 over 2014. The resulting income from operations was a loss of \$161,805. Investment earnings realized a gain of \$203,726 or 7 percent for Fiscal Year 2015, compared to a loss/gain of investments of \$315,931 or 11 percent for 2014. The Statements of Financial Position indicates Fiscal Year 2015 total assets of \$4,515,481 compared to \$4,909,692 in Fiscal Year 2014, a decrease of \$394,211. Additionally, the total liabilities in Fiscal Year 2015 were \$1,112,543, a decrease of \$435,898 over the previous year. While progress is difficult and results take time, with Board support, Association Forum remains committed to its long-term vision, a disciplined investment approach, and a sound and sustained fiscal stability.

REVENUE FOR FY2014



EXPENSES FOR FY2014





Association Forum of Chicagoland

Total Members

4,150

CEOs/Executive Directors - 397
Association
Professionals - 3,083
Supplier Partners - 593

67% Female
33% Male

Renewal Percentage

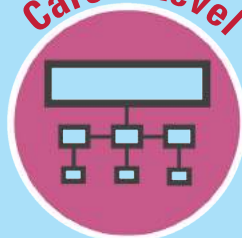
88% CEO
82% Association Professional
72% Supplier Partner
96% Forum Plus

Attendees at Programs

1,357

SIG Events & Education Programs.
(Excludes Forum Forward
and Holiday Showcase)

Career Level



CEO - 13%
C-Level - 7%
Department Director - 27%
Department Manager - 22%
Coordinator/Specialist - 31%

Membership Growth

3,087

3,222

2010

2011

2015 Education & Membership by the Numbers

Nonprofit Organizations

484

Supplier Organizations

476

Number of CAEs



424

Total CAE credits offered:

203

Members
for 10+ Years
469

Number of Programs
90

Including Shared
Interest Groups



Illinois
Membership

60% - City of Chicago
40% - Suburban

Number
of Employees

Average - 53
Highest - 1,000
Lowest - 1

New
Members
583



80% are national
and international
in scope

3,438

3,799

3,957

4,150

2012

2013

2014

2015

GROW YOUR CAREER AND BUSINESS WITH ASSOCIATION FORUM

Everything Association Forum does is designed to help members enhance their careers in particular and the industry at large. If you're a member or considering membership and want to get more involved with Association Forum, there are many ways—and many benefits. In exchange for your time and support, you will develop leadership skills and enhance your network.

- Network intimately with industry experts and thought leaders through discussion boards, events and Shared Interest Groups
- Receive in-person and online education as well as the chance to review proposals for key education events. There are opportunities to earn education scholarships, too.
- Enjoy the award-winning FORUM magazine in print and mobile formats, as well as the opportunity to author articles.
- Contribute to industry and organizational issues through committee or working groups while exercising new leadership, teambuilding and communication skills. Association Forum committees govern everything from the annual meeting and awards program to the association's governance and best practice initiatives. Working and advisory groups often have program-specific roles; opportunities to serve include impacting FORUM magazine, Holiday Showcase, the Women's Executive Forum, and more.
- Access sample association management documents including bylaws, certification materials, forms, manuals, policies, RFPs, job descriptions, and more.

Contact members of the [ASSOCIATION FORUM STAFF](#) for questions about the organization and the industry.