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Renewal.*





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Sheltering Allows Opportunity for Professional Growth

by Kathy Raab, CAE, CNAP



TAKE ADVANTAGE OF YOUR TIME SPENT SHELTERING IN PLACE BY COMMITTING THIS MONTH TO CONNECT TO OTHER ASSOCIATION PROFESSIONALS THROUGH ONE OF THE MANY WSAE RESOURCES.

But then, as we all (yes, even those of us who are not normally basketball fans) know, March Madness became a casualty of concerns over the spread of the Coronavirus.

WSAE offers so many ways to have fun while learning and networking throughout the entire year. Unfortunately, WSAE, like March Madness as well as our members, is having to cancel some of our events, experiment with taking others virtual and finding new ways to allow you to engage with your peers and enhance your association leadership skills.

As we work to ensure your continued professional growth in this challenging social climate, I encourage you to share your stories — of success, challenges and even failures — and ask questions. You can do this on our website either conversationally in the Connected Community or more formally by posting a blog post, and you might be surprised at the conversations that could start.

Reach out to peers who would benefit from joining WSAE. A great way to do this in via LinkedIn or other social media platforms. Maybe make a bracket of potential members you could reach out to! Keep in mind that membership is not just for the CEO. I've brought four additional staff members onto my group membership so they, too, can become better professionals.

Remember that *networking* is only one letter away from *not working*. Take advantage of your time spent sheltering in place by committing this month to connect to other association professionals through one of the many WSAE resources. Make your dues dollars a good business investment. And while you are at it, don't forget to take advantage of our webinars, online credentialing test prep courses, real-time compensation benefits survey and the strategic resources available through Association Laboratory.

While I missed the excitement of watching Gonzaga go all the way to the title (perhaps next year), let's make the most of this challenging time by creating a little WSAE excitement of our own! ■

Originally, I was writing my column for this issue on March Madness — that time of year when even those who ignore college basketball all of a sudden go crazy and enter bracket competitions. I'm guilty here. I don't follow the UW Madison Badgers or Milwaukee Bucks very closely, can only name a couple of the players, but I get caught up in the "Madness" and throw my bracket selections into the competition rings. Basketball has not been kind to me. Even in middle school, checking in at 6'2" tall and very uncoordinated, I was asked to play goalie (stand under the basket behind the black line and if the ball came to me, I was supposed to catch it). I've been jaded ever since I fell for that line, but I'll eventually get over it.

March Madness creates excitement, encourages working together, taking chances, studying the data and then engaging — that's what I strive for in my association!



Calendar of Events

See the calendar at www.wsae.org for more information on these events, and to register.

CEO Roundtable Madison Happy Hour
May 7
Location TBD

CEO Roundtable Milwaukee
May 12
Location TBD

Spring Fore-ward
June 1-2
Grand Geneva Resort & Spa,
Lake Geneva

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

SUMMERTime to Shine
Details TBD

Summit
October 26-27
Brookfield Conference Center,
Brookfield



The Foresight Imperative: Taking the Long View on COVID-19 and Your Association's Future
April 22

Tips & Tools for Eye-Catching Marketing
April 29

Essential Elements of Association Management: Legal Considerations in Association Management
May 14

Negotiate Like a Pro
May 20

Life After Launch
June 10

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Professional Ethics Takes a Team Approach

by Richard Kyte

When Gallup released the results of their annual survey of honesty and ethics in the professions earlier this winter, nurses once again earned the top spot.

This marks 17 straight years that nurses have ranked higher than any other profession. Eighty-four percent of respondents rated them *very high* or *high* in honesty and ethical standards. Medical doctors came in second with a 67% *very high* or *high* rating.

Bankers, real estate agents, lawyers, stockbrokers and members of Congress all had a positive rating under 30%. Members of Congress were once again at the very bottom of the list with only 8% of respondents rating them positively and 58% rating them negatively. Clergy, who once were the most trusted profession, had an all-time low 37% positive rating.

Why do some professions enjoy consistently high levels of trust while other professions rate low year after year?

Part of the answer may lie in the motivations of individuals within the professions. When I ask nursing students why they want to go into nursing, they invariably respond by saying they want to help others. Business students, by contrast, are more likely to be motivated by self-interest.

IN HEALTH CARE, TEAMS OF PEOPLE WORK TOGETHER IN A TRANSPARENT, METHODOICAL FASHION TO RESOLVE THEIR MOST DIFFICULT ETHICAL PROBLEMS. IN EVERY OTHER PROFESSION I CAN THINK OF, THE MOST DIFFICULT ETHICAL PROBLEMS ARE HANDLED EITHER INDIVIDUALLY OR BY SMALL GROUPS OF PEOPLE WORKING IN AN AD HOC FASHION BEHIND CLOSED DOORS.

But motivation does not fully explain the reputational difference among professions. Most young people who go into ministry or politics also embark upon their careers with pro-social motivations. And my own experience of lawyers, bankers, real estate agents and car salespeople suggests that the individuals in those professions are just as trustworthy as anybody else.

If that is true, then what earns a profession a positive or negative reputation is not just the people in the profession but the way the profession is practiced. Especially important is the way different professions handle ethically problematic cases and circumstances.

Most professions in the United States today have codes of ethical conduct or professional standards. Many, like law and engineering, also require a certain number of hours of ethics training each year.

But only health care professionals have gone beyond codes and standards to develop a culture of working together in teams to figure out how to handle ethically complex situations in real time.

That was not always the case.

After the parents of Karen Ann Quinlan filed a lawsuit to remove her from a respirator in 1975, health care professionals around the country realized they were going to be faced with more and more cases in which new technologies presented them with choices they had not been trained to make. They wisely came up with the idea of creating ethics committees to handle such cases, knowing there would be no way to craft comprehensive rules of conduct for every future situation.

A hospital ethics committee will typically receive referrals from someone in the system, gather information about the case, deliberate using an agreed-upon decision-making model and then deliver a recommendation about how to



proceed. They will ask whether the case was an isolated instance or whether system changes should be made to prevent similar problems from arising in the future. If the case is particularly difficult to resolve or presents instructive features, they might publish the case for the benefit of ethics committees at other institutions.

No other profession relies upon the collective judgment of their own members to determine how to proceed in challenging circumstances, nor does any other profession devote so much time and money into improving the quality of their collective judgment.

In other words, in health care, teams of people work together in a transparent, methodical fashion to resolve their most difficult ethical problems.

In every other profession I can think of, the most difficult ethical problems are handled either individually or by small groups of people working in an ad hoc fashion behind closed doors.

Everything we know about ethical decision-making tells us that human beings tend to make bad choices in isolation or in secrecy.

Right now, most professions put their faith in an ever-more-complex set of rules, standards and regulations to try to rein in unethical behavior. But there is no way we can possibly devise comprehensive ethical rules for every situation. The world is changing faster than new rules can be developed. Besides, the imagination of people designing the rules is never as robust as the imagination of those intent on evading the rules for their own advantage.

It does not have to be this way.

What if other professionals, such as politicians, lawyers, bankers and clergy, conducted themselves more like health care professionals? What if they organized teams of people to look into ethically complex situations within their professions? What if those teams were tasked not with making judgments about past conduct but instead were asked for recommendations on how to proceed in current situations? What if members of each profession held one another accountable for following those recommendations?

I predict we would see a restoration of trust and confidence throughout our society.

When a majority of people report no confidence in the guardians of most of our core institutions, isn't it time to try something new? ■



Richard Kyte is Director of the D. B. Reinhart Institute for Ethics in Leadership and Endowed Professor of Ethics at Viterbo University in La Crosse, Wisconsin. He will present his talk *Ethical decision making for association leaders* at the **2020 WSAE Spring Fore-ward** event. Be sure to join us!

Spring Fore-ward

The WSAE Spring Outing is the perfect mix of education and fun. Develop your network among like-minded people with similar, yet different, experiences, who are also investing in themselves, moving forward and contributing to their industry.

Note: While we are currently planning the Spring Fore-ward as an in-person event, we continue to monitor the social climate. We are assessing various scenarios and will follow the guidelines coming from local authorities and take into consideration the need to ensure the safety and health of our members. We do anticipate that this event will take place in some form.

Meet some of the presenters:

John Hooley, Resurgent

KEYNOTE

Five fixes to boost online member engagement in 2020



Richard Kyte, D. B. Reinhart Institute for Ethics in Leadership, Viterbo University

BREAKOUT

Ethical decision making for association leaders



Nancy Depcik, Professional Keynote Speaker and Communication Skills Coach

CLOSING

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Pandemic Management Strategy for Associations

Visit WSAE's COVID-19 Resource Web Page:

- Links to reliable information sources
- Announcements from the Governor and his administration
- Best practices for associations

www.wsae.org/events/covid-19

This template has been designed by Strategic Membership Solutions to help associations develop a clear, simple and focused strategy that delivers powerful value for members while also securing the sustainability of the association:



DEMONSTRATE CONSISTENT, PURPOSEFUL, AND CALM LEADERSHIP

- Implement a clear written strategy that outlines a considered and realistic pathway forward through the crisis.
- Establish a strong network of allies who share your agenda (may include competitors).
- Ensure regular, consistent and clear messaging to stakeholders throughout the crisis.
- Begin preparing strategies to deal with the recession that will follow the pandemic crisis.



POWERFULLY EXERT INFLUENCE TO SECURE SUPPORT FOR MEMBERS

- Secure short-term assistance required from government for members (e.g., stimulus initiatives or local procurement requirements).
- Prepare the groundwork for recovery projects to ensure these can progress as soon as possible.



PROVIDE MEMBERS WITH THE SOLUTIONS THEY NEED WHEN THEY NEED THEM

- Take immediate action to provide the right support to each member segment – and be prepared to innovate to achieve this. Adapt to the new work-from-home requirements.
- Be a trusted source of truth and curated insights by keeping members up-to-date on issues and trends that affect them.
- Facilitate connections between those in the community to enable them to share stories, and to ask for – and offer – support.
- Provide health, mental health support and financial relief for members where possible and appropriate (e.g., crisis hotline, dues relief).



ENSURE THE FINANCIAL SUSTAINABILITY OF THE ASSOCIATION

- Understand the new financial position of the organization and undertake proactive cashflow management by cutting unnecessary costs and identifying the shift in income (for example, move to online events).
- Manage your existing sponsors and plan your recovery strategy. The objectives of sponsors will have shifted, and you must be ready to deliver.
- Ensure staff are supported to deliver the plan outcomes in an environment where they are likely experiencing trauma.
- Minimize the risk of staff becoming ill by automating and streamlining processes where possible.



Take the opportunity to innovate, make bold changes, and be open to ideas that may have been inconceivable a few weeks ago. You can do this – and will emerge stronger because of it.

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Getting Ahead of the Crisis

Making sense of the trend data

by Dean West, FASAE

On March 12, 2020, my colleague and I arrived in San Diego. Our goal was to lead the International Warehouse Logistics Association (IWLA) through strategic planning.

Here's what we found upon arriving: California Governor Gavin Newsom had just spoken about the state's response to the growing crisis. The resulting policy contributed to the wide-spread cancellation of meetings with more than 250 attendees.

Respecting growing concerns about the spread of the virus, the IWLA board and staff had acted swiftly. The convention at which the strategic planning meeting was being held had just been canceled that day. More than 423 attendees and exhibitors had been told to stay home. IWLA was suddenly staring at a \$1.3 million hole in their anticipated revenue/expenses, overnight.

Out of more than 30 original participants, only nine would be in attendance for strategic planning. In a nearly empty room, with four times the food needed, a subgroup of leaders plotted what to do next.

ASSOCIATIONS WERE ALREADY SHIFTING THEIR FOCUS TO THE DIGITAL AND ONLINE ENVIRONMENT PRIOR TO THE COVID-19 CRISIS. IN DECEMBER 2019, 61% OF RESPONDENTS TO *LOOKING FORWARD 2020* SAID THEY WERE EXPANDING ONLINE EDUCATION. IN ADDITION, 52% OF RESPONDENTS PLANNED TO CREATE OR EXPAND ONLINE COMMUNITIES.

Getting ahead of the crisis

Where is the opportunity for organizations in all the madness resulting from the COVID-19 pandemic? For the last week, I'd had conversations with clients and prospects who were so dominated by the current crisis that they couldn't manage the emotional or intellectual bandwidth to think three months down the road, let alone three years.

It seems critical to figure out how to get ahead of the curve of this crisis. We reexamined the meaning of data collected just prior to the pandemic highlighting changes in the business environment facing the association sector, how this environment was impacting their strategy and what they were doing to adapt.

Strategic assumptions - accelerating, not changing

While the lessons of the COVID-19 pandemic must be understood and incorporated into decision-making, it will be critical that associations not underestimate the impact of fundamental shifts in the environment that were already occurring and may now be accelerated.

We were already seeing movement towards online or digital relationships. While face-to-face activities for many organizations will continue to be a critical component of their strategy portfolio, the business environment has reached a tipping point where meetings, as a focus of organization activity and association strategy, will decrease. Consider the following:

People are accustomed to meeting virtually. More than a third (35%) of respondents to *Looking Forward 2020*, a scan of the association strategy environment conducted annually by Association Laboratory that includes input from more than 500 associations globally, indicated their members are increasing their use of online or virtual education. The familiarity of individuals and organizational use of virtual meeting technologies, such as Zoom or WebEx, has become increasingly commonplace.



Disincentives to travel are becoming more prevalent and online learning more important. Many individuals, particularly in healthcare, are seeing more institutional or employer disincentives for travel to conferences. In a multidisciplinary environmental scan of the physician environment conducted in March 2020 on behalf of Wolters Kluwer Health, physician respondents identified online learning centers as twice as important as face-to-face events to their relationship with a medical society.

Virtual meetings and related technology are becoming less expensive and more reliable. Technology platforms for virtual events have become more prevalent, less expensive and easier to use. Technical difficulties and disruptions seem less apparent. Average Wi-Fi speeds are increasing, making virtual activity easier. The augmented/virtual environment experience will continue to improve and provide real competing and complimentary options to traditional face-to-face events.

Associations were already shifting their focus to the digital and online environment prior to the COVID-19 crisis. In December 2019, 61% of respondents to *Looking Forward 2020* said they were expanding online education. In addition, 52% of respondents planned to create or expand online communities.

In *Lord of the Rings*, Frodo Baggins, the protagonist, is anxious about the danger he finds himself in, the dramatic turn his life has taken as he journeys to Mordor.

He seeks the comfort and wisdom of his friend, Gandalf, the Wizard. “I wish it need not have happened in my time,” said Frodo, referring to his newfound plight. “So do I,” said Gandalf, “and so do all who live to see such times. But that is not for them to decide. All we have to decide is what to do with the time that is given us.”

It is time to rise to the challenge of COVID-19 and lead the change necessary to continue improving associations’ contributions to our industries, professions and society. ■



Dean West, FASAE, association futurist, is founder and President of Association Laboratory, a full-service research and strategy company that serves trade and professional associations. WSAE members receive a special 25% discount on industry white papers, webinars and events offered through Association Laboratory. More info: www.wsa.org/resources38/association-laboratory



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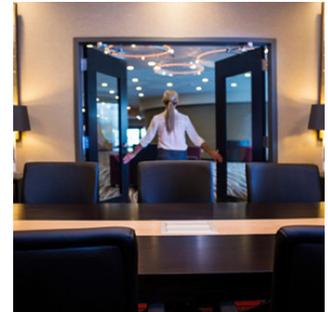
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Communicating About Association Events During Pandemic

by Don Neal



The global outbreak of COVID-19 has affected many, and associations are not exempt. Here is a list of best practices to consider within the current events industry landscape.

Be clear and proactive in your communication. In times of uncertainty, people crave certainty. Giving information regarding when a decision will be made, or when an update will be given, is a good approach.

Create a monitored email alias where people can send their questions. People need a point of contact, and this helps to keep the uncertainty off of social media and other public channels, which has a tendency to feed panic. Example: *“We know that you have questions and concerns, and we have a team of experts monitoring the situation, which is changing day by day. At any time, please feel free to contact _@_.org. We are committed to delivering a response by the next business day.”*

Designate a team of experts to monitor and manage. The situation takes up a lot of brain space and it is easy for office and online chatter to become distracting. Putting a team

in charge relieves people of responsibility, slows down the spinning wheels, and helps them to focus on what work still needs to be delivered. It also reassures your attendees that you are monitoring the situation, paying attention and making smart decisions.

Provide very clear instructions when an event is canceled or postponed, and try to remove all uncertainty from the situation. Before making a decision on refunds, it is very important to consult with your legal counsel and board, assess overall financial impact and land on a decision that best serves the interests of both your organization and your community. *Example: Your registration will be credited to the rescheduled event, and should we be unable to reschedule and need to cancel, we will fully refund fees paid at that point. Your registration will fully*

credit you for next year’s event. Please do not call the hotel directly to cancel your reservation. Your reservation has been canceled by our team. We will provide information on making new reservations once the rescheduled date has been set.

THE SITUATION TAKES UP A LOT OF BRAIN SPACE AND IT IS EASY FOR OFFICE AND ONLINE CHATTER TO BECOME DISTRACTING. PUTTING A TEAM IN CHARGE RELIEVES PEOPLE OF RESPONSIBILITY, SLOWS DOWN THE SPINNING WHEELS, AND HELPS THEM TO FOCUS ON WHAT WORK STILL NEEDS TO BE DELIVERED.

Offer an FAQ section on your website detailing responses to

the top questions your average attendee will ask. This will help mitigate the inundation of calls and emails your customer service team will handle. Answer questions like:

- Are you postponing, canceling or moving the event online?
- What will happen to my current registration? Will I receive a refund?
- If postponing, what happens if I can’t make the new date?
- What can I do to get an airfare refund?
- What can I do to cancel my hotel?
- What can I do to get reimbursement for airfare or hotel booked outside of the registration system?
- How will my sponsorship package be affected?
- Who do I contact for more information?

Allow sufficient time for your event participants to change their plans and adjust their calendar. Be mindful of the timeline you allow for attendees and sponsors to change their travel.

Do not forget about your industry partners, who are just as invested in the event as you are. Over-communicate with them about how you are monitoring the situation and the options they have should the event be rescheduled or canceled. If your event is continuing as planned, still provide updates on what the options will be with a potentially reduced audience or should alternate scenarios play out. Talk to your partners, ask what they want to accomplish and revise your packages as needed to create new options for partners who are uncertain if they will be able to participate.

Embrace the opportunity to experiment and try new things. Those who have always wanted to try virtual are exploring it. Those who have been wanting to reduce content are considering it. Those who have been wanting to create partnerships are reaching out to others with canceled events and inviting them to join them at their fall conference. The groups that will weather this storm the best are the ones who are willing to try new things.

Keep your tone optimistic and responses hopeful in a time of unease and disappointment, yet sensitive to the current situation so as not to come across as tone-deaf. *Example: "This is not business as usual, but at C2 it never is. Right now, our team is putting all its creative energy to work doing what C2 does best: embrace change, reinvent and answer challenges with bold solutions to create an unforgettable experience. We'll share more details soon. In the meantime, expect something audacious and new. So don't go far — you'll want to be there when we raise the curtain."* via c2montreal.com.

Be careful of where and when you place your emphasis in your marketing efforts. When planning for an event that takes place later in 2020, avoid highlighting content that could be a cause for concern, e.g., sampling-related content at a food event, images of large crowds, hand-shaking. Do place your emphasis on event facets that are not associated with the virus, such as content, education, speakers and sessions. ■



Don Neal is Founder & CEO of 360 Live Media.
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Virtual/Hybrid Strategy Facilitation

Creating meaningful vision and plans anywhere

by Lowell Aplebaum, CAE, CPF

In February 2020, a diverse group of 13 volunteer leaders of the Construction Specification Institute were finalizing plans to travel to Chicago in early March for a one-and-a-half-day retreat, re-imagining the structure and purpose of their components and the value of the organization. A few weeks and one COVID-19 virus later, six leaders had arrived just as travel advisories were ramping up and seven remained at home. Knowing that, despite what was happening in the world, we had been working toward this retreat for months, we chose to pivot and use technology and varied facilitation methodologies to include all leaders, giving equal space and voice, ensuring no participant felt less than others, even if some were not physically in the room.

As we enter a period where in-person gatherings are on hold, knowing that virtual is the new reality for all of us in the coming weeks/months, the change in medium does not reduce the need at this very moment for our leaders to connect on vital conversations and the work of vision and strategy. Virtual should not cause the pursuit of any organization's vision or mission to falter. Here are some approaches and lessons learned for enabling an engaging virtual strategy discussion.

Choose a technology platform that is easy to access, incorporates video and is intended for many users.

While there are a number of platforms available for virtual facilitation, in our case I chose Zoom since there was audience-familiarity and we had accounts already. The platform served us well.

Ask all participants to have technology ready.

Before the session starts, everyone should be prepared with a device to run the technology meeting platform, ideally having signed-in once before the session so any tech glitches have been resolved.

ON A REGULAR BASIS, ASK PARTICIPANTS TO CHECK IN: IS THE FACILITATION APPROACH WORKING? ANY SUGGESTIONS FOR REFINEMENT? ARE THEY FEELING HEARD? THEY CAN SHARE WITH THE GROUP OR MESSAGE THE FACILITATOR DIRECTLY WITH FEEDBACK. THE ATTENDEES WILL APPRECIATE HAVING VOICE IN THE PROCESS AND, FOR THE FACILITATOR, IT ALLOWS ADAPTATION OF THE APPROACH IN REAL TIME INSTEAD OF ONLY HEARING REFLECTIONS POST-MEETING.

Plan for all perspectives. At the start of the session, we wanted to ensure everyone could see each other — not just from afar like you see in many conference-rooms, but individually. Whether more than one person is in the same room or each is dialing in separately, have each person set up their own computer with the camera on. That way, even if they were sitting across from one another at a conference table, they are still face-to-face with those joining virtually. As

we eventually ease back into hybrid live/virtual sessions, we can add in dual cameras in the front of the room so those attending virtually can see the live participants as a whole, in addition to the presenter at the front of the room.

Icebreakers still help. Our opening activity was an introduction in which each leader identified a core strength they brought to the table — a superpower, if you will.



Especially in a remote facilitation, it is important to build group bonds so the assembled leaders become a team.

Invite all to participate. As a full virtual session where you want all participants engaged, a key role of the facilitator is to track who has spoken and call on those who haven't yet contributed. Knowing they could be called on at any moment, leaders are less inclined to check email or attend to a secondary task; everyone is there to engage and participate. In a hybrid format, it is important to intentionally alternate who is speaking between those in-person and those participating virtually.

Take frequent breaks. Recognize that staring at a screen for long periods of time is draining, so take a pause approximately every 75 to 90 minutes, with variance depending on where you are in the schedule. During this time *everyone* should be encouraged to get up, stretch and refresh. The group should also agree to keep to the break times as set.

Share presence. Of course, life is still happening outside of the virtual session. If during the session someone needs to attend to a professional/personal item, they simply put in the chat box *away from the table* and then *at the table* when they return. Life is busy — especially right now — so there should be no stigma when someone has to attend to an emerging issue, as long as there is transparency around being engaged and present. Added bonus? Pet/child/spouse sightings increase connection to each other's lives.

Vary interaction methodology. Incorporate varied means of conversation and collaboration. A few we used:

- **Paired processing.** We started with two level-setting questions that were more global in nature. Rather than start with the entire group, everyone was paired up to have initial ideation conversations for each question. The pairs called each other on the phone, but could also still see each other over video. After a few minutes of paired processing, we brought everyone together and rotated through the pairs for input. In hybrid models, make sure the pairs are one live/one virtual person and that you alternate at the end between virtual/live contributions.
- **Additive listening.** In pursuit of a group narrative of success, we facilitated an individual visioning exercise. As each leader shared their thoughts, everyone was asked to be in active, rather than passive, listening mode. This meant continuing to add to their own visions as they heard insights from their colleagues as well as recognizing where there was overlap of vision. We ended this section by agreeing on a shared group vision that incorporated the places of concordance.

- **Small group breakouts.** Dividing out a large group for smaller-group interaction is incredibly valuable and a method that shouldn't be abandoned just because of a virtual facilitation. We structured small group breakouts utilizing multiple Zoom breakout rooms. We pulled everyone together at the end of each small group breakout and instead of report-outs, allowed free-flow discussion of findings. In a hybrid format, it is key that these are mixed groups to ensure balanced participation.
- **Full group dialogue.** After there has been a small group discussion where all voices had space, a large group synthesis works. Starting with the large group should be used sparingly to avoid attendees disconnecting and contributors orating. One voice at a time over a sustained period leaves many in passive mode, reducing their overall contributions and engagement.
- **Chatbox for sharing and asking questions.** The chatbox provided another space where any attendee could post a question mid-conversation or during break outs. Additionally, those times we used in-room easel post-its for thoughts/notes, staff would copy the in-room notes into the chat box so everyone could see what we were discussing.

Utilize a Zoom captain. Essential to the success of the facilitation was the facilitator's ability to focus on group discussion and dynamic while having a staff support person on Zoom tracking incoming questions, identifying *raised hands* so all voices were heard, quickly resolving any technology bumps and capturing key thoughts or ideas during our full group synthesis moments.

Process check-ins. On a regular basis, ask participants to check in: Is the facilitation approach working? Any suggestions for refinement? Are they feeling heard? They can share with the group or message the facilitator directly with feedback. The attendees will appreciate having voice in the process and, for the facilitator, it allows adaptation of the approach in real time instead of only hearing reflections post-meeting.

Meals and times of connection. We know that some of the best teamwork happens over breaking bread. Virtual facilitation means the cost of travel and food is largely mitigated, which provides a novel opportunity. The organization can send all attendees a \$20 UberEats or GrubHub e-certificate, so the organization is still buying them lunch, scheduling time for them to eat together and talk. Additionally, there is value in hosting a happy hour time, allotting 30 minutes for everyone to get a beverage of their choice and connect solely through

the video platform, socially saying *hi* and networking without an agenda.

Start with the end and end with what's next. Take time at the beginning of the session to ensure everyone understands what we're trying to achieve. At the end, verify the group has accomplished what they set out to accomplish and make sure they are in unity on next steps. Without coming to a solid conclusion and agreement on what's next, attendees may go away with different perceptions.

While there is more nuance than can be captured in an article, the success of virtual strategy lies in the agreement by all parties to be flexible in process, to adapt as things unfold or need to be tweaked, and to believe everyone is there to achieve a single purpose and will jointly determine together how to best achieve the needed outcome. Designing the right approaches to facilitation and engagement can allow your attendees to feel present even if they are in different time zones. ■



Lowell Aplebaum, CAE, CPF, is CEO and Strategy Catalyst at Vista Cova, and is Chair of the ASAE CAE Commission, 2018-2019.



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10 Web Marketing Trends for 2020

by James Roloff and Elise Chan



Every marketing person understands how important it is to stay current with the latest trends. In order to keep your organization brand visible, you need to be where your audience is, and to be there providing a modern and up-to-date experience.

Here are 10 web marketing trends identified for 2020.

1. Website accessibility

Website accessibility works to ensure there are no barriers to the information on your website, despite any differences in ability. While there is no official legislation on what makes a website *accessible*, courts commonly look to the Web Content Accessibility Guidelines level 2.0. Foundational features of an accessible website include a fully responsive design, high color contrast, the use of alternative text on images and the ability to navigate without a mouse. These features overlap with SEO best practices, so having an accessible website is a win-win for everyone.

2. Privacy and security

You've likely seen the high-profile data breaches all over the news. Year after year, customers are facing the reality of their

data security and privacy being eroded away. In 2020, it'll be an important trend to continue to watch for. This means ensuring that your website follows best practices, such as encrypted traffic, privacy controls and opt-ins.

3. Voice search

Google's last major update, BERT, implemented technology to better understand the nuance of human language. This has the greatest impact on *informational* searches, which are often question-based. To ensure you are being found for these searches, it is important to have content on your website that addresses questions specific to what your target audience is asking at each stage of the membership life cycle. This content should be easy to read and

scan, which involves using clear language and headers.

4. Growth in alternate platforms

The overall traffic trend continues to show that platforms, such as Google My Business, Facebook pages and other industry listing and review sites, are taking an increasing share of the internet click market share. As this happens, it becomes more and more difficult to get users off those platforms and on to your own individual website. Our recommendation? Make sure that you are active on key platforms for your audience, and try to maintain independence with your website through good email marketing and customer relationship management (CRM) list management.

5. Lead magnets

Lead magnets are a great tool for generating leads and providing value to potential customers. There are many types of lead magnets which you are likely familiar with: free trials, online guides, industry reports. The goal should be to create a cornerstone piece of content that addresses a specific need of your target audience, which you then offer

IN ORDER TO KEEP THEM MOVING THROUGH TO THE NEXT STAGE OF THE MEMBERSHIP JOURNEY, IT IS IMPORTANT TO GUIDE THEM. FIRST, LIMIT THEIR CHOICES TO PREVENT DECISION FATIGUE AND BETTER CONTROL WHERE THEY WILL CLICK.

in exchange for their contact information. Make sure you promote your lead magnet on the appropriate platforms and plan out a nurture strategy for these leads as they come in.

6. Lower organic SERP

Have you noticed that clicks to your website from search engine results pages (SERP) are decreasing? You are not alone! It's a growing trend that more and more Google searches end with no click. This means that a user got the information they needed directly on the results page, be it on a map display, a knowledge graph or a featured snippet. Despite protests from content marketers that this practice is unfair, it seems to be here to stay. To continue to get clicks this year, follow the SEO best practices of quality content writing and link building.

7. Video

Video is an effective and engaging method to communicate with your audience. There are many different ways video can be used outside of the traditional *About Us* format. 2020 is definitely the year to experiment with DIY video content, including shooting a video to promote your lead magnet on social media.

8. Even more local SEO

Local, local, and even more local. Search engines and social media platforms continue to increase their ability to detect and show content based on a user's location. As a marketer, this means you need to optimize your website and business listings for local targeting. Be sure to include accurate address, phone and business name information throughout your website and social profiles. Also be sure to solicit positive Google reviews and links from other local organizations.

9. Audience guidance

Your audience does not want to go on a scavenger hunt when they land on your website. In order to keep them moving through to the next stage of the membership journey, it is important to guide them. First, limit their choices to prevent decision fatigue and better control where they will click. Second, make it clear what content should be the point of focus by incorporating empty space in your website design. Finally, a more advanced option would be to include subtle animations to draw the eye to specific elements on your webpage.

10. Great content

In 2020, will great content still be necessary? Of course. Writing quality content, with a focus on addressing your target audience, will always be an integral part of good digital marketing. We recommend our clients consider who their top member personas are, and develop a content strategy to speak directly to their needs. If your passion and knowledge shows through your content, you can still build trust with prospects in this age of brief digital interactions. ■



James Roloff is Sales and Marketing Director and **Elise Chan** is Account Manager at Powderkeg Web Design.

As part of the Powderkeg team, they educate their clients on the current trends in digital marketing. This ranges from the latest design styles, search engine optimization rankings factors, programming technicalities, and more.

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A Closer Look at Fraud Risks for Associations in 2020

by David Schade



Modern conveniences mean that connected devices in our lives continue to increase: 26.6 billion such devices worldwide in 2019, up 18% from 2018. But while convenience may be the benefit, the cost often comes in an increase in the number and sophistication of cybersecurity threats transmitted through the devices. Profiting from the art of deception, criminals use a variety of methods to compromise business email accounts, from phishing emails and social engineering to email spoofing and malware. Without regard to size or geographic location, these dangers span all industries, from retail to healthcare, and manufacturing to *not-for-profits* — no entity is off limits.

Know the threats

Social engineering: Deception that involves tricking people into breaking security procedures to divulge confidential or personal information to perpetrate fraud.

Business email compromise (BEC): A scam targeting businesses and associations by using social engineering or email intrusion to compromise legitimate business email accounts and conduct unauthorized fund transfers or obtain personal information.

THE GOOD NEWS FOR YOUR ASSOCIATION IS THAT FRAUD DOESN'T NEED TO HAPPEN! CONDUCT A REGULAR REVIEW OF YOUR FRAUD HEALTH TO DETERMINE GAPS, AND IMPROVE YOUR CONTROLS BY DEVELOPING A PLAN OF ACTION TO MITIGATE THE RISK OF FRAUD.

Phishing: Using deceptive emails and websites to harvest credentials, personally identifiable information, banking and credit card details to commit fraud.

Email spoofing: Sending deceptive email that looks like it comes from a trusted source.

Malware: Malicious software unknowingly installed on a computer system that can steal sensitive information, alter or hijack a computer system or plant ransomware.

Fraud by the numbers

According to the annual Association for Financial Professionals (AFP) Payments Fraud and Control Survey, in 2018 a record-setting 82 percent of businesses were targets of payments fraud, 20 percentage points higher than 2014. Fraud methods included: 70% by checks, 45% wires, 33% Automated Clearing House (ACH) debits, 29% credit cards and 20% ACH credits. From October 2013 to May 2018, more than \$2.9 billion was lost in the U.S. from business email compromise alone.

In today's digital age, BEC is increasingly common in payments fraud. Wire transfers continue to be the primary focus, though checks and ACH are targeted to a significant extent as well. Because wire transfers are speedy and final, they continue to be an attractive target, which shows a clear need for internal controls and employee education. Fraudsters know that wired money is nearly impossible to recover due to immediate settlement and availability of funds.

The sad reality is that fraud is a common occurrence locally and globally. The good news for your association is that fraud doesn't need to happen! Conduct a regular review of your fraud health to determine gaps, and improve your controls by developing a plan of action to mitigate the risk of fraud. Education and training programs are key. Your association must be proactive about cybersecurity to prevent it, so speak with your trusted treasury management expert about protecting your association.

Protect your association

An ongoing commitment to educating and training employees is vital to reducing risk. Losing funds can be catastrophic, especially to smaller associations that count every dollar. However, damage to your association's reputation can potentially last well into the future. Make sure your association has a plan to reduce its fraud risk. The Association of Fraud Examiners (ACFE) and The Federal Communications Commission (FCC) offer training resources, including videos, tutorials, and fraud prevention checklists. Use resources such as onguardonline.gov and firstbusiness.com/resource-center/fraud-protection-checklist.

Fraud protection review

- Does your association have up-to-date controls in place to prevent fraud?
- Do you have a robust, ongoing training program for employees to stay on top of the latest cybersecurity trends?
- Does your association test its fraud health? How often?
- Does your association have the latest financial institution-provided fraud protection solutions in place?
- Does your association have a cybersecurity insurance policy in place to transfer the risk? When was the last time you reviewed your insurance coverage?
- What's your incident response plan? Is it up to date?

Businesses and nonprofits do not have the same luxury of individual consumer protection laws. *If a fraudulent transaction clears your association's account, depending on the type of transaction, you may have as little as 24 hours to report the transaction!*

Consider these two fraud tools offered by financial institutions to help mitigate fraud. Consider these proactive measures to protect your business accounts rather than going through the panicked fire drill when a fraud case appears:

ACH Positive Pay: This service monitors for unauthorized ACH transactions. Create a list of vendors who can debit your account at a specific limit. Then, you receive notification if an unknown organization tries to debit money from your account, and you can decide to pay or return the request. This automated service requires minor daily

attention, but blocks and requires action when potential fraud occurs.

Payee Check Positive Pay: Tackling check fraud head-on, Payee Check Positive Pay allows you to upload a file into your online banking platform from your accounting software when you initiate a batch of checks. As checks clear, each is matched against data in your uploaded file. If a check doesn't match because it was altered or not included in the file, that check is flagged so you can decide to pay or reject it before it clears your account.

Associations should take advantage of these tools, and also watch account activity daily to spot anything out of the ordinary before it's unrecoverable. Create a standard of separate duties within your office, and consider implementing dual control for outgoing transactions. ■



David Schade is Vice President - Treasury Management at First Business Bank, and is a WSAE member.



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Handling Stress in Challenging Times

by Nancy Depcik

Our world has certainly changed recently. I have never seen anything like this. It's scary and overwhelming and confusing. Suddenly, and I do mean suddenly, our kids are home from school, our offices have closed their doors and we have watched entire cities shut down. And for many, you don't even know when you will get your next paycheck.

How do we deal with it all? How do we survive all the stress?

My goal, in my speeches and in my life, is to help people gain a positive attitude — to see the silver lining. It's really hard to do this when we are surrounded by such depressing news 24 hours a day. So, let me give you a few tips on how to get through the day with some sort of sanity and to experience some stress-free moments.

1. Pick one time throughout the day to watch/listen to the news, then *turn it off!* The constant reporting of disease and death is enough to drive anyone crazy. Yes, we want to stay on top of what's happening around the world, and in our own back yard, but once a day is enough. This will be difficult, so force yourself to shut off that TV, unplug that computer and find an inspirational book to read or music to listen to.
2. Find your favorite music, whatever it may be. Make a playlist, then listen to it whenever you are feeling down. One of my favorites is *This is My Fight Song*. Every day, I sing these words at the top of my lungs: "This is my fight song, take back my life song." Yes, I will take back my life and return to some sort of normalcy, soon.
3. Visualize a healthy you. Take all five of your senses and *see* yourself as a healthy person; *Hear* your strong voice; *Smell* the flowers; *Taste* the food from your favorite restaurant; *Feel* vibrant and healthy. What you focus on, grows.

PICK ONE TIME THROUGHOUT THE DAY TO WATCH/LISTEN TO THE NEWS, THEN TURN IT OFF... THIS WILL BE DIFFICULT, SO FORCE YOURSELF TO SHUT OFF THAT TV, UNPLUG THAT COMPUTER AND FIND AN INSPIRATIONAL BOOK TO READ OR MUSIC TO LISTEN TO.

It's up to you to take control of your life during these crazy times. My advice is to take small steps leading to a healthier, stress-free you. Let's all come together to take care of ourselves and help each other. In the process you will find a courage inside yourself that you didn't even know existed. ■



Nancy Depcik is a professional speaker and communication skills coach. She is presenting two talks at the **2020 WSAE Spring Fore-ward**. www.wsaе.org/events/spring-fore-ward



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New Trends in Employee Benefits

Fresh fruit Mondays and pay to celebrate your birthday

by Elizabeth Kazda

According to a recent survey and article by *Associations Now*¹, nearly half of nonprofit employees are looking to switch jobs in the next five years. The time, energy and money it takes to backfill and train 50% of your staff makes you think — What is an association employer to do?

The answer to this is to create a culture that draws in and retains employees. Creating a vibrant and productive workplace culture is a mixture of ingredients including strong leadership, fair and equitable management practices and policies, and benefits that support the team.

We put a question out to ASAE members: *What are some non-traditional benefits you wish you had?* The answers ranged from flexible work schedules to student loan payoffs.

Other wish list items included high-investment items like staff breakfasts, stocked snack shelves, company-sponsored happy hours and paid professional memberships. And while

all of this sounds like they'd contribute to a great place to work, most employers have opted to take a more practical approach to employee benefits in the past.

Common practice today is to provide association employees with the basic benefits of health, dental, vision, retirement and paid vacation. Other paid time off benefits and/or flexible hours for parental leave and family care are catching on slowly. According to the Bureau of Labor Statistics, just 17% of civilian workers had access to paid family leave in 2018.² In the December 2019 federal budget, 2.1 million federal employees were granted 12 weeks of paid parental leave, a benefit military personnel already had. And it's no wonder paid leave is something employers are making strides to invest in. With a multigenerational workforce, this is one benefit that appeals to all ages. From Boomers, Gen Xers, Millennials, and the newest to enter the job market, Gen Z, everyone is looking for more flexibility to care for themselves and their loved ones. Creating a space for employees to do this can be a boon to retention.

It's no surprise to any seasoned manager that a 2012 white paper from The Center for American Progress³ reported in a *Forbes* article that replacing a single employee can cost more than 20% of that employee's salary. To replace an employee making a \$50,000 annual salary, a firm can expect to spend \$10,000. That \$10,000 could go a very long way in terms of benefits for the entire organization. And that's replacing just one departure. This same article reported that in exchange for offering more paid leave options, employers have seen a 60% increase in productivity and improvements in employee morale, regardless of company size.

¹ Smith, E. (2020, February 10). Survey: Nonprofit Employers Face Turnover Issues as Misperceptions Linger. Retrieved from https://association-snow.com/2020/02/survey-nonprofit-employers-face-turnover-issues-as-misperceptions-linger/?utm_medium=email&utm_source=rasa_io

² U.S. Bureau of Labor Statistics (2019, February 27). Access to paid and unpaid family leave in 2018. Retrieved from <https://www.bls.gov/opub/ted/2019/access-to-paid-and-unpaid-family-leave-in-2018.htm>

³ Sirkin, H. (2017, August 4). The Dollars and Sense of Paid Family Leave. Retrieved from <https://www.forbes.com/sites/haroldsirkin/2017/08/04/the-dollars-and-sense-of-paid-family-leave/#26725839511f>



This approach — that flexibility leads to better morale and more productivity — is catching on around the globe as well. Perpetual Guardian, a 240-employee financial management company in New Zealand, trialed the four-day work week and formally adopted it in 2018.⁴ The company then went further to allow employees to choose their own working days—fewer days for longer hours or more for shorter hours.

A flexible work schedule is easiest to accomplish with exempt salary employees who already show autonomy in and responsibility for their work. Just remember to make sure your office is staffed at peak times in order to maintain optimal service levels for your clients or members.

The practical advice is to find benefits your employees want while balancing your budget. This article kicked off with mention of *fresh fruit Mondays* and *pay to celebrate your birthday*, and those options are relatively easy to live up to. Seasonal fresh fruit can be easily found through a CSA box or other delivery service, or even by a quick weekend Costco run. And paying people to celebrate their birthday is as simple as offering an additional personal holiday to your benefits package. This is also a wonderful thing for employees who celebrate diverse holidays not officially recognized as U.S. holidays, including Diwali, Lunar New Year or Rosh Hashanah.

Back to our ASAE poll on wish-list benefits: we received a few suggestions that don't require a large investment of either time or money, including a social media call-out on your birthday or work anniversary, any kind of recognition for a work anniversary, desk gadgets, telework options and green initiatives.

There's something to be said for a pet-friendly work environment as opposed to the investment required for a staff outing. Of course, the best of these are benefits your employees will actually use and support the organizational culture. If your organization would want and use a monthly cell phone stipend over an additional personal holiday, then you do you! The goal is to create a workplace people want to come to every day rather than throwing more money at our industry retention problem. ■

⁴ Cheng, M. (2020, January 6). Finland's new prime minister wants her country on a four-day workweek. Retrieved from <https://qz.com/work/1780373/finlands-prime-minister-wants-her-country-on-a-four-day-workweek/>



Elizabeth Kazda, MBA, is a Project Manager for the League of Wisconsin Municipalities and an independent Human Resources Consultant. She is a new member of WSAE.



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Bring Business and Creativity Together for Strategic Thinking

by Melynn Sight

One of the strangest problems regarding strategic thinking is that we treat business and creativity as if they do not belong together. The reality is that they do.
—Sergey Prokofiev

While not every person in an organization needs to be a strategic thinker, it's critical for your organization to build a pipeline of strategic thinkers to help guide your organization towards a lofty vision, or to survive in a competitive environment.

Too often in a strategy meeting, the group jumps to solutions without a critical look at the most threatening risks facing the organization. Coming to swift decisions without challenging those issues and assumptions, examining them and critically thinking about them results in *same-frame* thinking. In other words, everyone thinking in the same way instead of considering different perspectives and alternative thoughts. With a few guidelines, you and your board can begin to change the mindset to the strategic.

Four principles help guide effective boards through these critical conversations.

1. Imagine success. Strategic thinking starts with imagining the long-term vision for your organization. If you do everything right over the next 10 years, what will your organization look like? What will it represent? Your vision should be big and bold — maybe even too big and bold to be realistic, by design.

The vision is an aspiration for your future: the best possible reality that, if big enough, will inspire equally big thinking that leads to significant strategic goals.

Strategic thinking begins with a clear mission and vision statement about your organization. They are completely dif-



DON'T AVOID BIG, ADAPTIVE ISSUES. ADAPTIVE ISSUES ARE ISSUES THAT ARE NOT EASILY SOLVED, MAY BE CONTROVERSIAL, TAKE TIME AND PERHAPS SOME CONVINCING, BUT ARE VITAL TO YOUR FUTURE.

ferent concepts. **Mission** is your purpose — what you do and how you do it. **Vision** is your destination — what you will be in a perfect world if you take the right strategic steps. This is step one of thinking strategically. It might take some imagination to think this big!

2. Think big-picture. Be curious. Then prioritize. Thinking big means more than imagining the best possible future. Thinking big means honest recognition of the biggest issues

facing your organization. A relentless focus on what must change for your organization to thrive or survive. If you only do this big planning process every three years or so, don't waste your valuable time on the little stuff.

Identifying significant issues or ideas goes beyond the moment-in-time strategic planning meeting. Effective strategic thinkers keep a *strategic radar screen* throughout the year, to capture thoughts, things you wonder about and potential new, big ideas.

3. Stay out of the weeds. Unify your thinking in a strategic direction, keeping the conversation out of operations. Your leaders cannot think about the possibilities when they are focused in the weeds. Stories from the past, as well as today's problems, keep you from wrapping your head around critical long-term thinking. Each person around the table is responsible for staying out of the weeds and keeping each other out.

If you don't have signs that read *get out of the weeds*, make some and put them on your meeting room table!

Sometimes, referring to something in your association's past is constructive. Define what you mean ahead of time by staying out of the weeds. Encourage others to speak up if they feel like the conversation is not appropriate for the strategy room.

4. Be objective. Consider factions and be a good listener.

There is valuable brainpower in the room where strategic thinking happens. Considering contrary points of view is priceless. This means you need a group of good listeners.

Consider the diverse experience, demographics, position types and different sets of eyes and ears sitting at the table. Listening to their perspectives helps remind you that group think (where everyone agrees) is out; bringing your silent voices into the conversation is in.

Since strategy is the entire Board's work — *President, it's not your plan; Executive Director/CEO, it's not your plan either* — keep your mind open to seeing the world from the perspective of others, not only from yours.

One way to stay neutral is to invite conversation, perspective and ideas from all the diverse or quiet factions in the room.

Help your directors try on the strategic thinking hat.

I'm not very strategic is a common response to the idea that strategic planning requires strategic thinking. One way to help attendees think big is to invite other people to help, whether they have a good grasp on industry or member segment trends or are representatives from specific, important member segments.

Examples of big thinking

Example 1

An association who took on relationships with industry partners as a strategic way to deliver more tangible value to members - through state-wide partnerships that help raise awareness of what the association can do for them, and how a partnership will help both sides.

Example 2

A local association who developed their own certification program and brand to raise the level of professionalism in their industry and to set the designees apart in the eyes of the consumer.



*Most times, we don't see things as they are;
we see things as we are.*

-Anaïs Nin

Another way to help participants be more strategic is to get in the mindset to wonder. Try asking *What-if* questions, or *How would this look at our association?* Big solutions come from contemplating big questions and ideas.

In a world full of experts and lead dogs, you don't have to know it all. Curiosity and imagination are key attributes of strategic thinkers.

Be relentless in moving towards your bold, aspiring vision.

Once you unite around your bold vision, review your list or your strategic radar screen. Review your big list of 10-25 issues facing your association — both inside and outside the association. Filter them by evaluating:

- Would solving this issue help us move more effectively towards the vision?
- Is the issue bold enough to make a significant difference to the future?
- How might we think about the issue if at first we think it's beyond our control?

Don't tackle the small issues: Fix them. Spend your time considering the biggest issues you face and what it will take to overcome them.

And don't avoid big, adaptive issues. Adaptive issues are issues that are not easily solved, may be controversial, take time and perhaps require some convincing, but are vital to your future.

Many industries are living in stormy waters, aiming for that lighthouse that's far in the distance. It takes courage to make big, bold decisions to tackle the big obstacles that could surface. Set goals to help you aim towards that beacon.

That's the art and also the benefit of thinking strategically.

Strategic thinking thrives on divergent thinking and challenging your perception of the most-pressing issues. The next time you walk into your strategic planning retreat, meeting or session, put on your strategic thinking cap, look honestly at the world as it is. Use your time wisely by focusing on *What if?* ■



Melynn Sight is a communications consultant. She works with local, state and national associations in many industries and Chambers across the country on projects that help to strengthen the connection between associations and their members. Learn more at nSightMarketing.com.

Empty Your Cup

by Jennifer Rzepka, CAE

There's a famous proverb that is observed by some of the most respected leaders. It sounds so simple, yet can be so difficult: *Empty Your Cup*.

A scholar visited a Zen master for enlightenment and advice. It was quickly obvious the scholar was full of his own opinions and knowledge. He interrupted the master repeatedly with his own stories and failed to hear what the master had to say.

The master calmly suggested that they should have tea and began to pour. When the cup was full, he poured until it overflowed, onto the table, onto the floor and quietly continued to pour.

The scholar cried "Stop! The cup is already full!"

The Zen master replied with a smile. "Exactly. This is you. So full of ideas that nothing more will fit in. Come back to me with an empty cup."

IF YOUR DEFAULT RESPONSES ARE DEFENSIVE, YOUR CUP IS NOT EMPTY ENOUGH TO TAKE AWAY ANYTHING OF VALUE FROM THE CONVERSATION. TO LEARN — TO TRULY LEARN NEW LESSONS — YOU MUST MAKE SPACE FOR THEM IN YOUR LIFE. BY LEARNING HOW TO EMPTY YOUR CUP YOU CAN OPEN YOURSELF TO INCREDIBLE NEW UNDERSTANDINGS.

Some of the people closest to you, those trusted experts, the ones you look to for wisdom based on their years of experience — they are the people who understand the importance of emptying their cups.

An easy way to judge how well you empty your cup is to consider how you receive feed-

back. When someone suggests you try something another way, or gives input that makes you bristle, how do you respond? Do you find yourself dismissive of their comments? Do you interrupt them? Are you waiting for your chance to speak so you can defend your stance or actions? Do you turn the conversation around to focus on them? If your default responses are defensive, your cup is not empty enough to take away anything of value from the conversation.

To learn — to truly learn new lessons — you must make space for them in your life. By learning how to empty your cup you can open yourself to incredible new understandings. It's a skill valued by most experts you know. They haven't become experts based solely on their experiences, they've been able to grow exponentially because they know how to empty their cups enough to learn from the experiences of others too.

Join me in striving to empty our cups every day to better learn from the perspectives of others. ■



Jennifer Rzepka, CAE, is President of Association Resource Center, Inc. (ARC). She is a member of WSAE.



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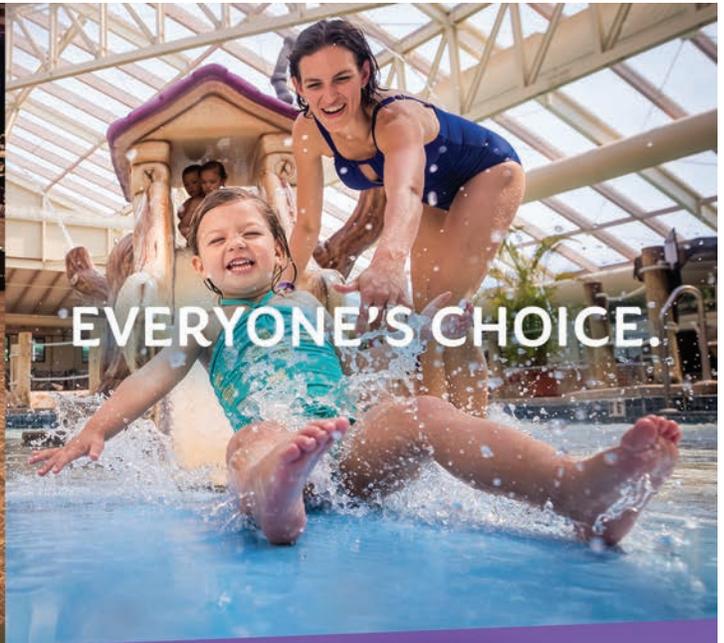
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Congratulations, CAEs!

Five association professionals from Wisconsin passed their CAE in December, and they are all WSAE members. We caught up with some of them to ask a couple of questions about their experience, and here are their responses:



Lindsay Bullock, CAE

Association Executive
Executive Director, Inc

Why did you decide to pursue your CAE?

My employer, Executive Director Inc, encouraged me to achieve my CAE after I became the executive director for one of our association clients. The more I learned

about the CAE, the more I saw how valuable it would be in my new role. I am so lucky to have had EDI's strong support on my CAE journey.

What does achieving your CAE mean to you?

It means that months of studying paid off, that I am better able to serve my association, and that I am so proud to have earned the top credential in our field.

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

I strongly recommend the MSAE prep classes. The CAE exam is not about memorizing facts and protocols; it's about mastering a specific way of thinking like a CAE. MSAE really helps you get into that mindset.



Sabine Gifford, CAE

Program Manager, American Academy of
Allergy, Asthma & Immunology

Why did you decide to pursue your CAE?

I wanted to learn more about the different facets of association management. There is a lot more to associations than what I have experienced in the positions

I have held so far and I was curious to know more. I love puzzles, so you could say that I knew I had only seen selected pieces of the association puzzle, but wanted to be able to put the pieces together to get a fuller picture. I say fuller, because there is always more to learn.

What does achieving your CAE mean to you?

Achieving my CAE was definitely a sign of perseverance, as it does take commitment to take on the exam while working full-time and still tending to family and friends. But it has also given me a deeper appreciation for all that goes into association management and the confidence to use what I have learned to support the association I work with now and the ones I will work with in the future.

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

I would advise anyone considering the CAE to go into the studies with an open mind. You will learn a lot, not only about the different domains of association management, but also about how you handle yourself in the process. I would suggest studying with a guide or utilize the help of a program that is out there as it provides a very helpful structure for the studying process.



Sara Truesdale Mooney, CAE, CEM

SVP, Strategy, Membership Services &
Marketing, Association of Equipment
Manufacturers (AEM)

Why did you decide to pursue your CAE?

For 17 years, I worked in a variety of Exhibitions Management roles at AEM. I also hold the CEM designation from IAEE.

When I transitioned to our Member Services side a few years ago, I wanted to expand my Association Management knowledge base. In addition to being mentored by AEM President Dennis Slater, studying ASAE's CAE curriculum seemed the best way to do that.

What does achieving your CAE mean to you?

It's a great feeling of accomplishment. I was fortunate to meet some great association leaders on this journey and make a lot of new friends. I'm the first at AEM to earn the CAE designation, so I hope to inspire and mentor colleagues in pursuing the certification.

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

Planning and preparation are key. In addition to earning the 100 CEU credits, give yourself six months to a year to study the curriculum. I highly recommend the MSAE courses. Know your learning style and find a study group if needed. Be prepared to spend evenings and weekends reading more than 2,000 pages, studying flashcards, and taking practice exams. It isn't easy – far from it – but it's worth it in terms of the knowledge you will gain and the great people you will meet.



Missy Zagroba, CAE

Association Executive,
Executive Director, Inc

Why did you decide to pursue your CAE?

Professional development has always been important to me and with the CAE being the highest professional credential in the association industry, I always knew that it was something that I wanted to achieve.

What does achieving your CAE mean to you?

Achieving the CAE feels amazing and I take pride in knowing not only that all the hard work and energy I put into studying for it paid off, but that I now have more knowledge, skill and the ability to serve the association community better.

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

Find someone to share the journey with, not only is a study buddy/group important for sharing knowledge, it is critical when it comes to moral support. Believe in yourself...you got this!



Congratulations also to **Christopher Stevenson, CAE**, SVP/Chief Learning Officer, Credit Union Executives Society, for passing the CAE exam. ■

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 or contact MSAE at (517) 332-6723. ■

Explore WSAE Member Benefits

While sheltering in place is in effect and many of us are working from home, there are still lots of ways to use your WSAE membership for both **taking advantage of educational opportunities** and **building your professional network**:

- Kick off or contribute to conversations in the Connected Community.
- Attend one of our webinars, offered multiple times each month.
- Author a blog post for the WSAE blog.
- Author an article for a future issue of *VantagePoint* magazine.
- Study for your CAE exam.
- Share interesting content with your peers on the WSAE Facebook page or by sharing WSAE content to your own Facebook page, Twitter or LinkedIn. Use of #WSAE and tagging us in your social media is strongly encouraged!

Contact membership@wsae.org with any questions.

Impact Association Management welcomes the American Medical Association Alliance

Impact Association Management (Impact) is pleased and proud to announce the signing of the American Medical Association Alliance (AMA Alliance) as their newest client. Established in 1922, the AMA Alliance is the nation's largest organization representing the physician family, including male and female spouses and partners of physicians and medical students as well as physicians and medical students themselves.

"We hit the ground running with Impact as our new association management company. Impact's transition team focused on our needs and the American Medical Association Alliance is looking forward to Impact increasing our membership numbers while strengthening our marketing presence and social media outreach." states Mary Beth Ellison, AMA Alliance President. ■

AMPED adds the American Academy of Anesthesiologist Assistants to client portfolio

AMPED Association Management, an accredited full-service association management company with offices in Middleton, WI; Metro Washington, DC; and Glenwood Springs, CO, has been selected by the American Academy of Anesthesiologist Assistants (AAAA[®]) to manage their operations.

AAAA, the national organization dedicated to the ethical advancement of the Certified Anesthesiologist Assistant (CAA) profession, provides advocacy and promotion of the Anesthesia Care Team in order to achieve the highest level of excellence in patient care. AMPED's Michael Battaglia will serve as AAAA's Executive Director, based in Washington, D.C. "AMPED's culture, technology and operational efficiency are strengths that we see as the perfect complement to this growing association. We look forward to working closely with AAAA members and volunteers to help CAAs realize their full professional potential." ■

Brag a little bit!

Send your news to Kristin

at kmcguine@wsae.org, and we will include it in future issues of *VantagePoint*.

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



Association Acumen chosen to manage Indiana Academy of Physician Assistants

Association Acumen, a full-service association management company based in Menomonee Falls, has been chosen to manage Indiana Academy of Physician Assistants (IAPA). "This new partnership is exciting for us as we work together with IAPA leaders to provide a strong administrative structure and nurture its organizational evolution," Betsy Smith, Association Acumen President, said. "We will provide IAPA with a customized member journey and support its continued membership and meeting growth." ■

VISIT Milwaukee launches video with message of hope

VISIT Milwaukee launched a video put together to send a message of hope and reassurance to clients, partners and community. View the video at https://www.youtube.com/watch?v=ip6jTZ_Mv4c.

VISIT Milwaukee, is also using a special hashtag to acknowledge that there are and will continue to be **#GoodThingsBrewing** in Milwaukee. ■

Democratic National Convention Committee Announces Date Change

In light of the unprecedented health crisis facing our country, the Democratic National Convention Committee (DNCC) announced today that the 2020 Democratic National Convention will now be held the week of August 17 in Milwaukee, Wisconsin, providing convention planners more time to determine the most appropriate structure for this historic event.

As part of their contingency planning efforts, the Democratic National Convention Committee has confirmed that Fiserv Forum, the Wisconsin Center District and hotel accommodations in the surrounding area are available in August. The convention planning team will now use the coming weeks to further explore all options to ensure nominating the next president of the United States is done without unnecessary risk to public health. These options include everything from adjusting the convention's format to crowd size and schedule. ■

As of March 15, 2020

ARC emerges

WSAE member Jennifer Rzepka, CAE, is excited to announce the ownership change and rebranding of Svinicki Association Management, Inc. (SAMI) to Association Resource Center, Inc. (ARC).

Rzepka has been working with the company for 20 years, for the past five years as 50% owner while purchasing the company from former business partner Jane A. Svinicki, CAE. The two have had a long, successful history that Rzepka looks forward to expanding in the new decade as President of ARC. With a full-time staff of over a dozen employees serving nearly 20 state and national non-profit associations, the company has had a strong and consistent path that made for a smooth transition through the buy-out.

Rzepka says, "It's thrilling to see the re-invigorated engagement and buy-in as I continue making changes, empowering the incredibly talented management team and engaging staff members at all levels of the company. I am honored to carry this company into the future and keep our strong legacy of exceptional people providing exceptional services to our clients." Visit ARC at <http://svinicki.com>. ■

Wisconsin's first Certified Faith-based Meeting Professionals

Three individuals from Milwaukee organizations are the first in Wisconsin to be designated Certified Faith-based Meeting Professionals (CFMPs) by the Religious Conference Management Association (RCMA):

- Megan Husband, convention sales manager, VISIT Milwaukee
- Tanya Curtin, senior sales manager, Hyatt Regency Milwaukee
- Joya Zamora, sales manager, Crowne Plaza Milwaukee Airport

"In earning the CFMP designation, VISIT Milwaukee and our hotel partners are emphasizing how important faith-based meetings are to our entire hospitality community," Husband said. "We have been members of RCMA for many years, so it was a natural progression to all work toward this certification together." ■

Troy Blewett, National Funeral Directors Association
Caroline Bowers, Impact Association Management
Alison Brodersen, Executive Director, Inc
Scott Bush, Greater Milwaukee Association of REALTORS®
Ashley Cortino, Impact Association Management
Maria Davis, League of Wisconsin Municipalities
Joshua de Beer, CAP, Big Brothers Big Sisters of Metro Milwaukee
Nelson Ennis, Madison Marriott West Hotel & Conference Center
Rebecca Fisher, TEAM, Inc
Katelyn Gladem, Madison Area Builders Association
Nick Goeser, ASA - CSSA - SSSA
JoEllen Graber, Impact Association Management
Maggie Gruennert, Badger Bay Management Company
Gina Hartl, Red Lion Hotel Paper Valley
Rebecca Hinz, The Rees Group, Inc
Tony Hofstede, Wisconsin Institute of Certified Public Accountants
Morgan Kath, Junior Volleyball Association
Elizabeth Kazda, League of Wisconsin Municipalities
Tracy Kern, League of Wisconsin Municipalities
Michelle Kohn, Greater Milwaukee Association of REALTORS®
Lisa Kratz, Madison Area Builders Association
Leigh Ann Larson, Wisconsin Hospital Association
Kat Lauer, AMPED Association Management
Nikki Lehmann, Wisconsin Institute of Certified Public Accountants
Becca Liebers, Badger Bay Management Company
Lionel Lim, Executive Director, Inc
Lexie Mallary, Wisconsin Hotel & Lodging Association
Lauren McCann, ASA - CSSA - SSSA
Ella Nelson, Valley Expo and Displays
Laura Olsen, AMPED Association Management
Yasmeen Pasha, Madison Marriott West Hotel & Conference Center
Lauren Ray, Junior Volleyball Association
Kirsten Reader, Impact Association Management
Katie Reiels, ASA - CSSA - SSSA
Katie Reiser, Credit Union Executives Society
Tim Smith, Omnipress
Alec Snyder, Wisconsin Automobile & Truck Dealers Association
Marne Stuck, Greater Milwaukee Association of REALTORS®
Rae Ann Thomas, Manitowoc Area Visitor and Convention Bureau
Jessica Tripler, Badger Bay Management Company
Rob Uhrina, Wisconsin REALTORS® Association
Brett Waliczek, Madison Marriott West Hotel & Conference Center
Matt Wascavage, ASA - CSSA - SSSA
Jennifer Wickman, Cooperative Network



We're All in This Together

by Michelle Czosek, CAE



First, let me say that I hope as you read this column that you and those you love are safe and healthy. For associations and industry partners that are struggling, know that the WSAE Board and staff are thinking of you and looking for ways to provide the resources you

need. We're available to listen to your needs and help with your challenges.

Every time we're on the verge of printing *VantagePoint*, I struggle with exactly what I'm going to write about, and Kristin ends up chasing me down. This column is an exception to that general rule. Right now, COVID-19 is the only thing on people's minds. There is no line that keeps this pandemic from easily crossing back and forth from our personal to our professional lives. There is no leaving the office which, for the majority of us, is now at some spot in our home, and putting down the stress of what this is doing to our associations, businesses and lives.

As I look at what this pandemic is doing to our world and how vulnerable it makes me feel personally, I try to embrace the positive things I see and the light that is there. On a recent webinar, the presenter asked us to chat what our theme song for this time is and mine was easy – We're All in This Together (yes, from High School Musical, I have two daughters). For me, that's because of the true sense of community that I've felt as I've worked with colleagues at our AMC, the WSAE Board, those in the Association Societies Alliance who are leading other state SAEs and frankly, everyone I've interacted with lately.

We're all looking for answers to similar questions:

- What should I be doing for my association members right now?
- Is my event planned in June (or July, etc. - insert any month for the rest of the year) going to be able to take place in-person?
- What exactly triggers force majeure?

- When will my hotel get back to business as usual?
- How can I provide what is usually face-to-face education in a virtual format?
- Am I going to be able to realize the sponsorship dollars that are in our budget?
- Does my association have the financial resources to weather this storm?

These are some difficult questions and for some, especially those related to meeting in-person, no one knows the answers to quite yet.

As an association, WSAE wants to help you answer these questions as we provide resources that we hope will help as we all navigate this together. By the time this hits your desk, we will have held two virtual CEO roundtables and a virtual meeting planner roundtable using Zoom. We've partnered with the other state SAEs to provide two webinars – one on transitioning live events to virtual and one where association staff members show us exactly how their associations are pivoting to provide the resources their members need. We've created a COVID-19 resources page on our website and are emailing you and updating social media as we have new and helpful resources.

Please don't hesitate to reach out to me or any WSAE Board member if you have questions, ideas or other information that we can provide to our community or if you just need to talk to someone that's experiencing the same issues and challenges you are. This is truly a time where the Power of A(ssociations) and the community we've built shines through.

I sincerely hope to see you in person at one of our industry partner locations where we can come together to do what we do best – network, share and learn. In the meantime, please take care of yourselves and each other.

Stay well,

Michelle



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.

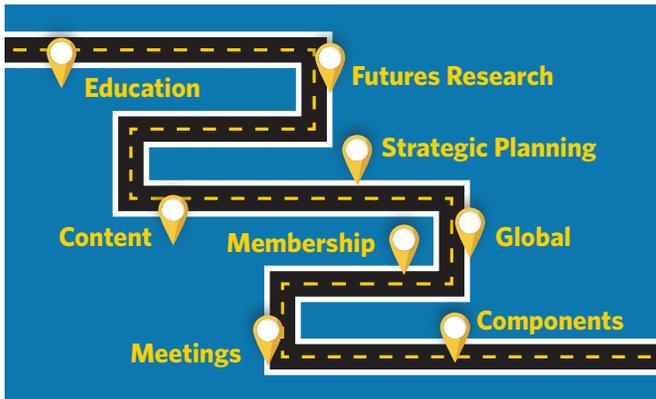


Association Laboratory Inc.

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 > 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.



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



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More information: www.wsae.org > Resources > Compensation Benchmarking



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