Welcome

Welcome to the 2017 edition of Circuit, now in its 14th year of publication. If last year’s unexpected and dramatic victories by the Chicago Cubs and Donald Trump are any indication, we have entered a time of change and uncertainty. Who could have predicted either of those events a year ago? But while uncertainty has the potential to lead to hesitancy or even uneasiness, some things remain constant — the enduring value of associations and the strength of SmithBucklin’s commitment to our industry.

SmithBucklin continues to help our client organizations achieve their goals and deliver value to members, just as we have since 1949. We do this by hiring people of great talent and character who are driven to make a difference and inspired by serving others.

And certainly, the value of associations — which remain both the lifeblood of our company and a vital part of the global economy — has not changed. In fact, the role and importance of associations is only magnified during uncertain times as organizations work to help their members respond to disruption, manage change and secure their futures.

The first section of this year’s Circuit, which we have called “20 for 2017,” is focused on those futures, offering our thoughts on 20 key trends, issues and developments that will impact associations in the coming year. These 20 pieces give us an opportunity to showcase the thoughts and insights of our colleagues, who are continually thinking about our client organizations and the road ahead. Our hope is that these stories will jumpstart thinking and conversation about the evolution and continuing significance of associations.

We have provided a sharable, digital version of Circuit as well, available at www.smithbucklin.com/circuit2017.

On behalf of our entire team, I would like to thank our many partners and colleagues for their ongoing support, loyalty and friendship. We look forward to continuing to work with you to accomplish our mission — to achieve the missions of the client organizations we serve.

I have included my phone number and email below, and hope you will feel free to contact me at any time.

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The following are 20 key TRENDS, ISSUES and DEVELOPMENTS that will impact associations in the coming year. While we don’t have a crystal ball, our people do get a first-hand look at what is affecting associations through the work they do alongside volunteer leaders, industry partners and professional colleagues. Our “20 for 2017” is our opportunity to share what we’ve learned. These thought pieces may reinforce or challenge opinions you already have, or they may provide new insights that will become top of mind. Either way, we hope that this forward-focused content will help encourage thinking, discussion and action that will matter for your organization.

Consider these findings:

- **51%** of associations reported increases in membership over the past five years, while 31 percent had indicated a decrease in membership and most (65 percent) of those indicated the decrease was less than 10 percent. (Source: Marketing General Incorporated’s “2016 Membership Marketing Report”)
- **90%** of associations reported in 2016 an increase or no change in membership size. (Source: MemberZone/Micronet, Inc. association survey)
- **46%** of associations expanded programs and services in 2016, while only 7 percent reported a reduction in programs and services. (Source: “2016 Economic Impact on Associations Report,” McKinsey Advisors)
- **70%** of members surveyed believe the value they receive from their association is “very good” or “excellent.” (Source: Rockbridge 2016 survey of associations)
- **93%** of members surveyed said that meetings or conferences are an important benefit of belonging to their association, and 70 percent believe their organization is the voice of their profession. (Source: Abila “Member Engagement Study” 2016)
- **58%** of Millennials belong to a professional organization
- **92%** of Millennials strongly believe that membership in today’s professional organizations provides strong opportunities for them.
- **46%** of associations expanded programs and services in 2016, while only 7 percent reported a reduction in programs and services. (Source: “2016 Economic Impact on Associations Report,” McKinsey Advisors)

These current statistics are all positive indicators. However, the future will also be shaped by the actions of younger generations – our future members. In 2027, Millennials will be 36 to 46 years old. Their priorities will undoubtedly change between now and then, just as they did for previous generations. What do we know about this generation today that can provide some hints as to their future with associations?

Millennials are keenly interested in the valuable resources provided by a professional association. In fact, a 2015 study of Millennials illustrated to the left found 58 percent belong to a professional organization or community, and 52 percent strongly believe that membership in today’s professional organizations provides strong opportunities for them. This, of course, isn’t a surprise to those of us who serve associations every day. Members of the fastest-growing segment of the workforce are striving to grow in their careers and make a difference in the work that they do.

So what does the future hold for associations?

“I’m very optimistic!” said Shari Jacobs, author of “The Art of Membership” and an association industry guru. “There are some core ideals that have not changed. We always need to stay up-to-date in our professions, and there’s always going to be a need for education, credentialing and advocacy. But more than that, I believe there’s always going to be a need for community — associations are a way for us to share and exchange ideas with our peers.”

Associations already employ more than 1.3 million people and the industry contributes $142 billion in total revenue to the U.S. economy. Those numbers will only grow as associations continue to play vital roles in our society and our economy.

“The fundamental reasons associations were created in the first place have not changed. What’s changed is how people access and interact with them, and many leading associations are recognizing these shifts and reacting to them,” Jacobs said.
High Marks for Unconventional Education

Tried and true association education methods such as instructor-led courses, structured sessions and certification are now evolving in unconventional ways. In many cases, the results deserve an A+.

One unconventional method growing in popularity is formalized peer-to-peer education, because it has been shown that event attendees frequently remember conversations with peers more vividly than formal lectures.

An example is the North American Wholesale Lumber Association’s (NAWLA) Executive Management Institute. NAWLA is an organization that represents the interests of wholesalers, manufacturers and service affiliate companies in the lumber industry. The four-day intensive program offers senior executive attendees in a small group session the chance to address real-life business and organizational challenges they are facing. With industry leaders serving as facilitators, the small group of peers provides valuable solutions and suggestions to each other.

Unstructured education sessions also offer flexibility that traditional formats like instructor-led learning do not. For example, if new, impactful legislation is passed a week before an event, an unstructured session can be adjusted on the fly to address that topic.

This type of unconventional thinking can also extend beyond educational sessions. For example, instead of providing recognition for educational achievements only through formal certification programs, associations are now working with digital badges. This credentialed option, which is relatively new and still evolving, is a visual representation of a specific accomplishment that can be shared on social media (like LinkedIn, Facebook and Twitter), embedded in digital resumes and showcased on personal websites. While certifications indicate achievement in a broad skill set, digital badges offer an easy, accessible way to recognize more narrow-focused achievements. Badges can also be awarded for achieving incremental steps as the recipient works toward a larger goal.

The Institute for Credentialing Excellence (ICE), an association that provides education and resources to organizations and individuals that work in the credentialing industry, just launched an electronic badges program for members who complete specific ICE programs and certifications. As with all badge applications, recipients can create buzz about their achievements by posting their badges on personal social media. This means, of course, that their employers, colleagues and friends can see what they achieved. At the same time, the badges also create buzz — and greater awareness — for their association. The badges program ICE implemented goes even further; however, by offering in-depth tracking options for annual renewal of certifications. In this case, anyone can click on a badge to reveal metadata about that credential, such as when it was issued, when it expires, and what knowledge or skills were demonstrated. Another unique feature of ICE’s badges program is that issuing organization has a dashboard that tracks details such as the number of job postings that request ICE’s certifications and how many times a badge has been clicked on.

Innovative approaches to education can add value to events, increase attendee interest, offer an element of surprise and help providers sought-after recognition. By offering unexpected educational experiences, an association can increase its chances of delighting members and attendees.

Navigating Hospitality Market Uncertainty

In its “Meeting Industry Forecast 2017,” Meetings & Conventions reports that hotel supply growth may outpace demand in 2017, indicating that the association event industry could be shifting from a seller’s market to a buyer’s market for the first time since 2009. At almost the same time, however, a November 2016 Incentive magazine article “What Buyer’s Market?” says that many incentive travel industry executives believe that reports of a buyer’s market are premature. Further bolstering that position, the “2017 Global Meetings and Events Forecast” by American Express Meetings & Events predicts more mergers and consolidations between large hotel brands, which could further strengthen their ability to copret pricing.

Despite these conflicting messages, associations can achieve affordable and cost-effective events and navigate the uncertainty by 1) planning in advance, 2) allowing for flexibility, 3) prioritizing based on strategy, and 4) leveraging partnerships.

Planning ahead and being flexible can be a big asset to an association regardless of if it is a buyer’s or a seller’s market. According to the results of the “Meetings Market Survey” conducted by the Professional Convention Management Association, 46 percent of large meetings are booked more than three years out. Starting the planning process early offers more opportunities for negotiation on dates and meeting specifications, and it increases the potential for associations to obtain more favorable concessions.

Such forward-thinking action requires the important details of the event to be determined early in the planning process. When the board of directors establishes the association’s overall strategic focus, it may also be a good time to collaborate with the event team to determine the desired and necessary business aspects of future events and forecast the impact of new elements. These proactive conversations help boards set priorities and understand the explicit and implicit trade-offs of decisions.

Of course circumstances may arise that limit an association’s ability to book ahead of time — such as an evolving event strategy or changing industry dynamics. In these instances, if an association is willing to accommodate the open dates of a hotel or convention center — possibly in the middle of a week — there is a stronger likelihood that it can still attain advantageous rates.

And this type of flexibility can be extended to a meeting’s location as well. If a preferred destination is unavailable or priced above budget limitations, it’s important to be open to new thinking from trusted partners and be willing to embrace new ways of driving value for the association, even if they are unorthodox.

A near future where supply is greater than demand would be an exciting prospect for association meeting planners, but this is far from assured. As the hospitality industry waits for market clarity, don’t be paralyzed by uncertainty.
A Focus on Members

Membership retention and recruitment will continue to top association agendas in 2017 in fact, member-related topics reposed four of associations’ six highest priorities, according to the “2016 Economic Impact on Associations Report” by McKinsey & Company. These include acquiring new members, developing new methods for member engagement, improving member retention, and diversifying membership/potential new audiences.

There are three things to remember when focusing on membership retention:

One size does not fit all

Certainly, every member is different. But while it is impossible to tailor membership benefits to meet each individual’s specific needs, an association can still improve upon a one-size-fits-all option. Continuously re-examine if there are patterns and similarities around members’ job specialties, education requirements, travel constraints and preferences. If there are clusters of members that want similar things, offer these segments membership benefits packages – such as bundled fees, educational programming, content and networking activities – that are geared toward their specific needs.

For example, the Society of Pediatric Nurses (SPN) – an organization with a mission to advance the specialty of pediatric nursing through excellence in education, research and practice – discovered that members wanted in-depth education focused on specific practice areas such as pediatric oncology nursing. To address this, SPN leveraged its professional relationships with specialists and subject-matter experts to offer webinars and one-day seminars that better appealed to those same practice areas. By listening to and fulfilling the individual needs of each member segment, SPN is able to achieve its vision of being the premier resource for all nurses caring for children and their families.

Similarly, the North American Association of Roofing Contractors (NAFCD), an association dedicated to fostering trade and education for wholesale distributors and manufacturers of floor coverings and allied products, provides its members with timely, hard-crafted news briefings twice a month through NAFCD Distribution Digest e-newsletter. The publication covers topics such as economics, housing, technology, logistics, transportation and marketing from a distributor’s point-of-view. The digest also features profiles of industry thought leaders, showcasing their diverse perspectives on the state of the distribution channel and emerging trends. With this resource, NAFCD helps members adjust to and take advantage of the quickening pace of business while also connecting with each other. This has helped the association become members’ first and most-trusted source for industry news and information.

Members will pay it forward

Even with a strong value proposition, recruiting new members can be challenging. One of the greatest assets available is an association’s base of current members. “It’s not enough to have member acquisition as a board strategic objective,” said Kevin Gammonley, an association executive at SmithBucklin. “An organization that is committed to growing membership must allocate the necessary resources, and the best resource it can offer is dedicated time – both that of staff and volunteers – to actively recruit.”

Gammonley says an association has to generate volunteer champions, in which volunteers enthusiastically and voluntarily connect with influencers in their networks and share their membership experiences. The volunteer’s then introduce the prospective members to the association’s offerings with each person’s needs.

“For the volunteer there is no cold calling, no sales pitch. They are simply sharing with a peer or business associate why they are passionate about the organization. A staff member follows up and does the rest,” Gammonley said.

“The plan works. The boards that have embraced it are seeing membership growth and are also maintaining a healthy level of membership pipeline,” he added.

For-profit businesses have benefited from intrapreneurship for decades

For-profit businesses have benefited from intrapreneurship for decades. Apple is considered a champion of this philosophy and Steve Jobs, co-founder of Apple, described it as an opportunity to go “back to the garage, but at a large company.” He believed that innovators need to be given space and time to thrive. With that autonomy, Apple intrapreneurs have created products that include the Mac, iPod, iPhone and iCloud.

One of Google’s most famous management practices was something called “20% time.” Founders Larry Page and Sergey Brin described the idea as follows: “We encourage our employees, in addition to their regular projects, to spend 20 percent of their time on what they think will most benefit Google. This empowers them to be more creative and innovative. Many of our significant advances have happened in this manner.” (Thinks Gmail, Google News and AdSense.) Similarly, 3M Corporation

encourages employees to devote 15 percent of their time to their own creative pursuits. The Post-it note was a direct outcome of that policy.

Although associations and other nonprofits may not always have the resources to implement and sustain policies on the scale of Apple, Google and 3M, many still are finding ways to take the intrapreneurship leap. For example, a director at the National Society of Collegiate Scholars (NSCS) organized a staff outing to a museum exhibit about the power of innovation in society, then followed the field trip with an innovation workshop. In addition, NSCS has embraced a workplace environment where all suggestions are encouraged and considered, regardless of the individual’s tenure or experience.

Project Concern International (PCI) – a nonprofit organization dedicated to empowering people to overcome poverty – has also supported intrapreneurship by implementing its PCIInnovation program. This initiative includes a collaborative innovation lounge at PCI headquarters, as well as a 15-percent rule that allows employees to devote that percent of their work week to innovating. PCI also provides training on how to overcome common barriers to innovation, as well as guidance, advice, recognition and funding for efforts to help bring employees’ individual ideas to fruition.

The American Society of Association Executives (ASAE) celebrates the power of this type of thinking at its annual Great Ideas Conference. As ASAE puts it, “Open doors you never knew existed with idea labs and keynotes that spark transformation and help break boundaries that hold you back. ASAE also recommends making a habit out of looking for great ideas, and it stresses that innovation doesn’t require an innate brilliant mind – just imagination.

Of course, amazing ideas don’t necessarily need policies to foster them. The way to create a focus on intrapreneurship in an organization is to celebrate it and support it at all levels.

Associations that are able to create a culture in which entrepreneurial efforts are welcomed, nourished and championed will be exceptionally well-positioned to achieve great things.

An association can achieve this by continually providing content – through abstracts, newsletters, social media and more – that delivers news and a point of view about issues members face. An organization can also serve as a conduit for professional development and networking by providing those resources throughout the year. Frequent touch points cement the association as the primary source that members (and the public) turn to when they need information about the profession or industry it represents.

The Legal Marketing Association (LMA) – the community and voice of legal marketing professionals and attorneys looking to develop their practices – engages its members year-round through open exchanges of ideas and knowledge in its forums, journals, e-newsletters and social media channels. Content includes proprietary research conducted by the association, relevant job skills information delivered through on-demand training, industry-specific benchmarking standards for employers to evaluate staff, and in-depth industry reports. Because the content is relevant and up-to-date, members are eager to continually interact with LMA’s offerings throughout the year.

Going Back to the Garage: Embrace Intrapreneurship

Risk, reward and disruption have always been a part of a foundation for advancements driven by successful entrepreneurs who start their own enterprises. Associations can benefit from taking notice of a different breed of innovators – intrapreneurs – who have learned that sometimes powerful innovations can come from within an existing, established organization.
Content is an important offering for associations looking to provide exceptional value to their audience. It's not a new concept. In 1732, Benjamin Franklin began publishing his “Poor Richard’s Almanack” to promote his printing business. In 1902, the manufacturer Michelin developed its “Michelin Guide,” which is still published today. And more than 20 years ago, Bill Gates, founder of Microsoft, famously declared “Content is king!” At the time, Gates was predicting that content would drive significant profits on the internet. He believed audiences would want more than just an online version of a print magazine, so content providers would need to offer deep information that included audio and video. Gates’ comment was prescient and rings true today for associations.

Tradeshow Table Stakes

The “2016 Center for Exhibition Industry Research (CEIR) Index Report” predicts tradeshow growth of approximately three percent per year through 2019. With this predicted stability, it’s likely that the what of tradeshows will not change -- they will still provide valuable and valued information about products, industries and professions and bring together people with similar interests. However, tradeshows need to respond to new opportunities and innovative experiences. With this knowledge, number one reason attendees from survey data that the innovative experiences. With this knowledge, number one reason attendees from survey data that the

In many cases, the content will resonate best if it is personal and conversational, like it is a one-on-one discussion with the audience. This will help more people connect with the content more often, and it’ll probably be more fun to create.

Influence, inspire and move members to action. Give them a sneak peak of members-only content by sharing abstracts or samples they will find useful.

Successful associations provide their audiences with content they can use to be better at what they do. Look closely at what members want and need, then tailor it, create it and deliver it. And as Joe Pulizzi, the founder of the Content Marketing Institute said, “Actually talk to your customers. Use the language that they use. Talk about the things they talk about. Never feed salad to a lion.”

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Currently, associations that provide cohesive, educational, selfless and unbiased content to members are viewed as indispensable resources. However, the content strategies associations use must continue to evolve in order to mirror the perpetually shifting ways that information is consumed and shared by members and other target audiences. Simply stated, it is now essential for associations to take a strategic approach to content in order to engage constituents.

• Strive to provide content that the audience wants to consume and that will have the biggest impact. Ask, “Will members be interested in this?” This simple step challenges the association to be aware of the current interests and information needs of its members.

• Provide content that delivers the four R’s: the right message through the right channel (from print to social media and beyond) at the right time to the right audience.

• Capture the wealth of knowledge of the association’s members. Encourage them to share their experiences and advice by having them write for the association’s publications, website, or blog. In addition to the value it will provide to the association, this will also provide great experiences and visibility for members.

• Think beyond the written word. Valuable information can be found in videos, infographics, photos, webinars, social media posts, podcasts and more. These different communication options can deliver great impact.

Consider, for example, a 2014 Xerox Corporation study that found colored visuals increase people’s willingness to read a piece of content by 80 percent.

Data-driven decisions are a “must have,” no longer a “nice to have,” for association tradeshows. The data available to associations about their tradeshows is constantly increasing. For example, cell phone activity can now be tracked to show how much time attendees spend in specific areas of the show floor. This type of information can help accelerate efforts to understand attendee behavior and interests. Future growth in tradeshows will require listening to the data and responding with innovative experiences.

Content is Still King!

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Five Data To-Dos

Associations have a wide variety of data sources to leverage — association management systems, website analytics, event-focused wearable technologies and more. Advances in the collection, analysis and application of data can provide associations with more insights about their stakeholders than ever before. Rather than being overwhelmed by options, take a deep breath and consider these five suggestions for collecting and using data:

1. Be selective. Probably the most important decision an association can make is what to collect and what to not collect. After all, this isn’t Pokémon Go, so don’t feel like you “gotta catch ‘em all.” Determine beforehand how the data could benefit the association. Maybe it will help better identify the needs and expectations of members, or maybe it will provide details about members’ behavior that inform the redesign of an event’s exhibit hall. Have a clear action plan that is aligned with your association’s overall strategy.

2. Be secure. It’s essential to remain mindful of potential privacy or security issues. An association that has the trust of its members can’t ever take that for granted or try to exploit it.

3. Be visual. How the data is presented is a critical factor in how it is processed and perceived. If data is presented improperly, it can be difficult to understand and lead to “analysis paralysis.” Consider utilizing a pictorial or graphical format, as it can enable your audience to better grasp difficult concepts and identify patterns. A data dashboard focusing on a variety of visuals can also clearly communicate your findings and help key decision-makers (i.e., staff, board and committee members) understand them.

4. Be generous. If you have a beautiful and well-designed data dashboard, don’t keep it to yourself! When relevant, share it with sponsors, exhibitors and members. And be willing to customize it to include inputs of interest to them. This provides genuine value to your stakeholders and can result in increased loyalty and retention.

5. Be creative and forward-thinking. As you determine what data to collect, don’t be limited by only trying to solve problems that already exist. Consider gathering data that could help the association get ahead of future industry developments and trends. And don’t keep your data in silos. Data integration — which involves combining data from multiple, disparate sources to provide a unified view — can deliver unexpected breakthroughs.

One example of an association using data powerfully is the National Association of Healthcare Access Management (NAHAM). This organization is the leading resource in patient access services, a field that includes patient admissions, registration, scheduling, finance and more. NAHAM takes in data from member facilities and analyzes it to help the institutions better serve their patients by improving the registration experience. As a result of that work, NAHAM developed Access Keys®, a performance benchmark process that helps facilities determine their strengths and areas for improvements. This process is currently completed once a year, but the association will soon launch an update that will provide data analytics in real time.

Look Out! Politics Ahead!

One outcome of the recent election campaign cycle was that some associations — and more specifically, the industries and professions they represent — were hit by quick-strike collateral damage arising from candidate comments. This ranged from an industry or profession being cast in an unfair light to even being subject to outright falsehoods, thus resulting in the association having to work both hard and smart to correct negative perceptions that could further hurt its members.

Since it appears unlikely that the overall conflict-rich and divisive political climate will change anytime soon, associations must be ready to defend their members’ best interests. Being ready, however, is different than responding. In fact, in many cases an association will prudently determine to not respond because they judge that the threat — at least at that moment — does not warrant an ongoing, possibly public battle. In other cases, of course, it is indeed time for a strong defense, and when that’s necessary an association needs to be able to quickly and clearly communicate its viewpoint to decision-makers.

An official statement or news release might be a powerful answer. In some cases, however, efforts that involve members can be even more successful in mitigating damage, because they help personalize the message and might draw more attention to the association’s view. To help generate member-driven energy, an association can create talking points on the issue at hand and share them with top staff, board members and members-at-large who are carefully selected to serve as the association’s voice. Tactics these people can then pursue include phone calls, emails and letters to lawmakers, regulatory officials and other influencers. A select, trained core of members can also help maximize the association’s opportunities with both interviews with news media and in-person visits with elected officials.

When it makes sense, associations should also encourage member outreach through social media, as it is a preferred communication channel for some generations and provides associations with a way to make a quick impact. Politicians keep a track of how many messages they receive that represent a particular viewpoint on an issue, and social media is included in these metrics. It’s a highly visible and immediate form of contact that can influence policy as much as a personal visit to Capitol Hill.

The highly volatile nature of political debate in the U.S. has made it difficult to predict when and how a profession or industry will be questioned or attacked. But if an association knows that there are some issues or topics that might become fodder for political controversy, don’t wait for the problems to start. Be ready with a strategy that will help the association’s members and those in its industry or profession come together, focus their power and make positive things happen.
As part of that effort, HBMA conducted an industry-wide survey that gauged readiness and progress. Survey results revealed a variety of common struggles, particularly that internal testing related to the new codes was far behind schedule. To counter that fact, HBMA provided tip sheets and videos detailing how to prepare both staff and software. HBMA also worked directly with the Centers for Medicare & Medicaid Services (CMS) – the U.S. federal agency responsible for ICD-10 – in order to voice and resolve concerns, which included fixing a coding error discovered by HBMA members.

In another example, the National Association of Orthopaedic Nurses (NAON) – an organization that exists to enhance the lives and careers of orthopaedic nurses – provides its members with information about new clinical practices and developments, keeping them up-to-date and able to function to their fullest capacity. To do so, NAON provides tools and support made possible by the knowledge of its volunteer and association staff experts, the relationships it has with other industry organizations and its reputation in the industry.

Recently, in the face of health-care changes like bundled payment models and other value-based care options, NAON has provided free educational programs about the new standards. In addition, NAON has worked with the American Nurses Association to publicize their shared concern about problems that could arise with the roll out of certain new regulations. This has helped inform CMS about this and modifies regulations to facilitate physician compliance and better patient outcomes.

Finally, a powerful example of utilizing advocacy to make an invaluable impact for members is the National Society of Genetic Counselors (NSGC) – an association that promotes the professional interests of genetic counselors and provides a network for professional communications. While the field of genetic counseling first came onto the scene in 1971, for nearly 40 years it was not included in the Standard Occupational Classification (SOC) system that is used by the Department of Labor to recognize and track district occupations. That was a problem because it meant that official data about the field was not being collected, calculated, or disseminated. NSGC pursued SOC recognition for genetic counselors by creating and submitting to the Department of Labor a document that outlined the occupation’s history, defined its unique purpose and demonstrated the profession’s growth.

In 2010, NSGC succeeded in having genetic counselors incorporated into the SOC, and numerous national news publications have since used the data derived from it to identify genetic counselors as one of the top growing healthcare occupations. This came at a critical time for the association as demand for its members’ services skyrocketed. In 2015, there were significant investments in genetic sciences on behalf of large pharmaceutical companies and venture capitalists that created even more demand for these professionals. To address the increased demand, NSGC is able to make strong arguments for government support for training programs and scholarships to increase the number of qualified genetic counseling students – a pursuit that would be virtually impossible to justify without the Department of Labor’s SOC data.

As the Greek philosopher Heraclitus said, “The only thing that is constant is change.” This certainly holds true for healthcare and associations will be at the ready to help whatever does appear on the horizon.

The number of mobile devices is multiplying five times faster than our population.

The Most Important Association Engagement Device Ever

Here’s something you already knew: No matter where your association’s members are or what they’re doing, they are carrying a mobile device, and often using it as a mobile device. As reported by Groupe Spéciale Mobile Association’s (GSMA) real-time mobile device tracker, the number of mobile devices is multiplying five times faster than our population and surpasses the world’s total population.

In addition, mobile usage eclipsed desktop usage in 2016 and will continue to do so in the future. A report from Zenith – a unit of French advertising agency Publicis Groupe SA – revealed that mobile usage has increased rapidly from 40 percent in 2012 to 68 percent in 2016 and is forecasted to reach 75 percent in 2017.

Given the increasing importance of mobile devices, associations must continue to learn how to better leverage them to engage their members. To provide mobile experiences with optimal impact, here are four important areas to consider.

1. Content Creation and Curation. Mobile technology has made it easier and more efficient for association members to create their own content (i.e., podcasts, videos and social media posts). By encouraging members to use their mobile devices to be content creators and then curating, hosting and promoting what they create, associations can offer new viewpoints on important industry issues. The curation step is critical, though, so as to ensure quality and appropriateness of the content.

2. Networking. Mobile apps are now providing invaluable networking opportunities at events. The App Grip, for example, takes data about attendees’ interests and professions and then uses it to recommend networking matches. During an event, users can anonymously swipe right on an individual’s profile if they are interested in networking with the recommended attendees, or swipe left to skip to the next suggested profile. If both parties swipe right, an app chat function is activated that can be used to schedule a face-to-face meeting.

3. Data Gathering. Associations can gather data and feedback from members more often and more efficiently by using convenient, instant surveys that are answered via mobile device. By collecting data more frequently than they otherwise might without mobile technology, associations can gain additional insight into their members, which in turn helps them design programming and information that provides more value.

4. Content Delivery. Few things are more frustrating than when a website doesn’t provide a seamless experience for a mobile device user. If a member is trying to access an association’s website on a phone and can’t scroll through or load content correctly, then the site has failed. To help in this regard, Google has created the Accelerated Mobile Pages (AMP) Project, an open-source, cost-free initiative to help website publishers such as associations to create mobile-optimized content that will load 15 to 85 percent faster by improving the rendering and caching of a website.

One example of an association successfully leveraging mobile devices to better engage its audience is Lamaze International, a nonprofit organization that promotes a natural, healthy and safe approach to pregnancy, childbirth and early parenting. Lamaze’s Pregnancy – Parenting mobile app provides expecting parents with the best available research from Lamaze childbirth education experts. The app is highly interactive and includes tools to keep track of appointments, pregnancy milestones, mood, appetite, energy levels, cravings, measurements and more. It also helps reinforce the value provided by Lamaze.

If mobile is today’s “big thing,” what’s next? We may be hearing the point where virtual reality and augmented reality begin to blend in a way that mobile cannot match.
In 2016 Millennials became the largest generation in the U.S. workforce. Associations are keenly aware of this, as Millennials are also becoming an increasingly important factor as members and constituents. While the interests and priorities of this generation are diverse, studies show that there is one particular preference that demands the attention of associations hoping to attract them as new members: Millennials favor experiences over physical things.

As the Eventbrite study, “Millennials Fueling the Experience Economy” reports:

- 78% of Millennials would rather spend money on an experience or event than buy something material.
- 82% of Millennials attended or participated in a variety of live experiences in the past year, while only 70% of older generations did so.
- 77% of Millennials say their best memories are from an event or live experience they attended.
- 72% of Millennials say they’d like to increase their spending on experiences

In addition, a 2016 Washington Post article “Shoppers Are Choosing Experiences Over Stuff, and That’s Bad News for Retailers” explains that traditional retailers are struggling to compete against companies that sell experiences such as fine dining and vacations. A study by PwC before the 2015 holiday season showed that 52 percent of Millennials’ holiday spending would be on experience-related purchases, compared with 39 percent for older consumers. And according to market research firm Mintel, vacations and dining out are each projected to see a 27 percent increase in consumer spending between 2015 and 2019. That is the strongest growth of any spending category they examined.

For those associations that produce events and other types of experiential member opportunities, these stats are welcomed news. The challenge, of course, is to create experiences that satisfy the demand. But the opportunity is clear and some associations are upping their games in this area.

For example, to appeal to members that seek immersive experiences, one event transformed its show floor into a futuristic city with activities and networking opportunities at every “block.” Everything at the event followed the futuristic theme, from the decorated lounge areas to a display with the DeLorean from “Back to the Future” movie franchise.

Another event offered interactive activities on its show floor by allowing attendees to pilot a 3D flight simulator and control a real-life robot.

Many event cities and locations lend themselves to memorable experiences. A food distributor organization did that by kicking off an event in Atlanta – home to the College Football Hall of Fame – with a tailgate party that ended at the Hall of Fame.

Occasions at the reception included a wall of football helmets that stood up based on the attendee’s alma mater as they entered.

The organization also held an event in Indianapolis at which attendees could ride along with a professional driver for a lap at the Indianapolis Motor Speedway. Reaching speeds of 180 mph can certainly be memorable. And associations shouldn’t limit their imaginations to physical spaces. If the event is located in a country different from anywhere else will likely find something they cannot find anywhere else will likely find something that is shared via social media, especially platforms like Facebook, Instagram and Snapchat. The CWBC article, “Millennials Are Expanding ‘Experiences Over Stuff’” explains that Millennials use social media primarily to show off not what they have or what they’re wearing, but instead what they’re doing. At the same time, the more reason for associations to continue providing their members with interesting and exciting things to do.

Legislative and Regulatory Concerns: Don’t Be Anxious, Be Proactive!

Government relations, government affairs, advocacy, lobbying – these terms will be at top of mind for many associations in 2017. As members are increasingly concerned that they will be affected by changes in federal laws or regulations, according to the Association Leadership Survey report by Association Leadership, the percentage of association members who are concerned rose from 26 percent in 2015 to 44 percent in 2016.

There are many national issues that have no doubt contributed to this jump in concern, including the rising cost of healthcare; the possibility of increased tariffs and import fees; and certainly the outcome of the 2016 election. According to Michael Payne, executive vice president at SmithBucklin and head of its government relations team, associations should avoid getting sidetracked by anxiety and work to concentrate their efforts on long-term organizational strategies that directly impact their ability to serve their members and grow their organizations.

First, although deadlock has reigned in Washington, D.C. for several years that will of course be much less likely now. With both Congress and the White House in Republican hands, the federal government will be able to make more change happen. Most associations that are involved in areas like infrastructure, healthcare, international trade, or the military are already in government offices for what the shift in the balance of power in D.C. means for their industries and members.

But organizations can also achieve positive results without direct government action. For example, the National Association Medical Staff Services (NAMSS) – an organization that serves to advance a healthcare environment that maximizes the patient experience through the delivery of quality services – recognized that standardization was needed to improve the verification for healthcare practitioners. Rather than approaching government-enti ties that directly impact their ability to serve their members and grow their organizations.

For example, the American Hospital Association (AHA) and the American Medical Association (AMA) – professional trade associations that represent the interests of physicians and other healthcare providers and organizations to push for the type of content and the Organization of Program Director Associations (OPDA) and the Organization of Graduate Medical Education Training Form.

This form seeks to standardize the process for the verification of a practitioner’s internship, residency and fellowship experience in compliance with healthcare accreditation organizations’ standards. Over time, individual hospitals, medical care organizations and other healthcare entities that have developed their own unique forms for obtaining train- ing verification. This created an efficient system in which training programs received multiple requests for the same information, slowing the credentialing and onboarding process of practitioners and creating extra challenges for all involved. The standardization of this verifica- tion form eliminated these inefficiencies. Since its release, the form has been downloaded more than 6,000 times from the AHA website and has been implemented in hospitals and other healthcare organizations across the country.

Associations are also likely to be impacted by legislative changes on the state and local level. For example, new regulations regarding short- term rentals have jeopardized the success and livelihood of members of the Vacation Rental Managers Association (VRMA) – a professional trade association of the vacation rental property management and hospitality industry. Local and state governments are attempting to control online rental property management, but are also impacting vacation properties managed by VRMA’s members.

VRMA worked in a coalition with several other associations and organizations to push for the legislation’s adoption and directly engaged state legisla- tors to encourage their support. VRMA also asked advocates to get involved in the membership of the state with instructions on how to reach out to representatives VRMA shared news and progress updates with members directly and through social media. The legislation was successfully passed and has served to improve the viability of short-term rentals managed by VRMA’s members.

There are several areas to watch for regulatory changes to concern associations and their members. But to best serve your members amidst a shifting regulatory landscape, a tailored government relations approach can be a powerful force.
Purpose: The Secret Weapon for Associations

There is a growing body of research that indicates organizations that instill a sense of purpose – an inspirational reason for being which inspires and provides a call to action – have higher rates of enduring success in terms of business performance. This is great news for associations because at their core they are purpose-led.

After all, associations advocate for businesses and industries, help create and protect jobs, grow careers, enable training, increase product and workplace safety, and contribute to new discoveries and technologies that save and improve lives. Put simply, associations do work that matters. And that is the essence of being purpose-led.

Many companies that put an emphasis on purpose do it as a major factor for why they have seen increased loyalty from customers and clients. There is a growing body of research that indicates organizations that instill a sense of purpose – an aspirational reason for being which matters. And that is the essence of being purpose-led. Purpose: The Secret Weapon for Associations

Put simply, associations do work that matters.

Research also indicates a focus on purpose directly impacts an organization’s ability to attract and retain the best talent. The LinkedIn and Imperative included data showing:

40% of the U.S. workforce is purpose-oriented.

85% vs 42% 85 percent of purpose-led companies had positive revenue growth in the past three years, versus 42 percent of non-purpose-led companies that had a drop in revenue during that same period.

58% vs 42% 58 percent of companies with a clearly articulated and understood purpose experienced revenue growth of 10 percent or more, versus 42 percent of companies not prioritizing purpose.

If that’s not persuading enough, the Deloitte Millennials’ Culture Survey reported in 2014 that employees at organizations with a strong sense of purpose are:

- Confident that their organization will grow – 82 percent (organization with a strong sense of purpose) versus 48 percent (organization without a strong sense of purpose).
- Optimistic about their organization’s future prospects and their ability to stay ahead of industry disruptions – 83 percent (organization with a strong sense of purpose) versus 42 percent (organization without a strong sense of purpose).

Volunteer Power

One common characteristic of high-functioning associations is the presence of a group of dedicated contributors – both paid and unpaid – working closely together in harmony. One opportunity to foster optimal collaboration is to view the contributions of volunteers similarly to those of staff members and to manage accordingly.

Recent research, including an American Society of Association Executives (ASAE) Foundation survey of staff and members from 75 associations, strongly affirms the value of volunteers. On average volunteers provide 20 to 25 percent of the total work hours for an association, contributing highly-skilled, hands-on help for no cost. Additionally, there is a significant improvement in the long-term retention of members who volunteer, compared to those who do not.

However, this study also showed that volunteers are managed differently than staff members. For staff performance is tightly managed through the basic, time-tested techniques similar to those used for paid staff. For example, a staff or board member should be responsible for overseeing each volunteer’s activities and providing them with constructive feedback. They can also help identify opportunities for the volunteer to advance within the organization. In addition, it can be useful to ask volunteers to self-assess their own performance to determine how volunteers perceive their role in the association, whether they believe their contributions are valuable, what their attitude is toward their role, and more.

Beyond improving volunteer performance, these practices will also help associations better meet volunteer expectations. Keep this crucial group empowered and engaged by providing the input and guidance needed to help them excel.
Healthcare Associations Fuel Innovations

Healthcare innovations don’t happen overnight. Ideas must be carefully cultivated and formed, and then they need to reach their target audiences. Healthcare associations can play a unique role in assisting companies and entrepreneurs to refine new ideas and then introduce the world.

At the earliest stages, associations can help those creating healthcare advancements – which can include new pharmaceuticals, medical devices, systems and more – by facilitating communications with healthcare professionals. Associations can act as a bridge to help those behind the innovations better understand what professionals’ needs are and what works in the real world. They can also help them appreciate the way to say, explain and introduce things that provide products relevant in focus groups for companies encouraging by NACN to bring new products to their booths so members can see them, test them and provide immediate, face-to-face feedback that can directly impact the product. The experience and resulting discussions can get both exhibitors and members actively considering solutions and improvements that will ultimately help patients.

In some cases, associations can help clinicians improve their knowledge and competence regarding an innovation. One example is biosimilars. When a patient for a biologic drug – one made by a living cell – expires, a biosimilar drug can be created using the same chemical “recipe,” potentially driving the cost down and expanding patient access. With the help of The France Foundation – an accredited medical education company that has received independent educational grants from pharmaceutical companies – associations have educated their members for the entity of biosimilars into clinical practice. They have provided access to a detailed curriculum and an informative website to help clinicians make effective treatment decisions and communicate with patients about these new treatment options.

The process to achieve innovation in healthcare can be time-intensive, high-cost and high-risk. And yet every day there are new steps put forward that could lead to breakthroughs that improve and even save lives. Associations can play a powerful role in making that happen by providing innovators – be they a company, a team of physicians, or an independent entrepreneur – with unique opportunities to ensure their success.

In Concert: How to Enhance Alignment with Chapters

Many U.S.-based, national associations serve members through a combination of organizations, chapters and special interest groups that can include representation – and distinct contributions – at the regional, state and/or local levels. However, differences in perspective and available resources among the organizations can lead to confusion and/or the appearance of conflict. As a result, it is important for the national association to help enable alignment and collaboration throughout all levels in order to drive holistic success.

Here are three suggestions for making that happen:

• **All-in at the national level.** The contributions and commitments of regional, state and local volunteers must be respected and valued, because it won’t be well-received or productive if they believe the national level is simply inviting them to the table while at the same time actually ignoring their needs, interests and opinions. Consider how to best include all leaders as part of the national level’s decision-making process, as this can help keep everyone aligned regarding strategy and results. This certainly can mean creating a pipeline and best practices to include them on the board, key committees and in other roles.

• **Play to strengths.** Encourage each level to concentrate on what it can do best. The overall strategies that support the national association’s mission can be segmented per level, allowing each an important role to play. This segmentation can help optimize the overall success of the association, and deliver efficiencies and cost-effectiveness.

• **Equip for success.** Ensure everyone has the tools, best practices and information that will help them accomplish their goals. If this isn’t a priority, it can create inefficiencies as well as animosity. For example, determine if the national level can provide financial services support, which can include common accounting systems, protocols, training and senior oversight to help drive great efficiency and ensure sound financial practices. This can lead to greater process consistency across all levels, which will be reflected in the experiences members have during any financial transaction, such as paying for dues or programs. Note that this type of effort requires careful planning and consideration, as each organization would likely require a different level of financial management and accounting service due to the variation in financial activity and complexity.

Finally, for those national associations that don’t currently have regional, state or local representation, consider if the addition of these would help better serve members through the unique value they can provide. Member and stakeholder requirements may dictate that a lone national organization is sufficient. To be effective, the creation of additional organizations should be based on need, not aspirations, and targeted to geographies that have high-interest and potential volunteers. If that isn’t feasible, consider a partnership with an unaffiliated local-level association that serves similar stakeholders.

**Ensure everyone has the tools, best practices and information that will help them accomplish their goals.**
Resilience: Lessons from the Tech World

In the tech world, resilience— the ability to respond to and come out ahead of challenges—is absolutely necessary for success. As a result, volunteer-governed nonprofits operating in technology industries are also expected to react nimbly to changes in the marketplace and evolutions in technology. In some cases, reinvention is even required—a fact that must be celebrated, not feared.

Some of these organizations, called independent technology user groups, operate much like associations. They bring together individuals with similar interests and provide value to their members by offering access to education, training, and networks of experts and professionals. And, like associations, they do all of this while constantly navigating an ever-expanding and changing landscape.

One important difference between associations and user groups is that most user groups operate in a triangular ecosystem that includes the user (similar to an association member), the user group (the equivalent of an association) and the specific technology system or solution (the uniting focal point for users that corresponds to an association’s industry or profession).

Despite this key variation, associations in search of their own resilience in the face of a shifting marketplace or industry can learn from the experiences of their counterparts in the fast-moving and high-energy technology user group world. Here are some takeaways:

Evolve quickly to serve members. In the technology world, companies with established products and solutions often release new, updated versions in order to adapt to changing needs. The associations and user groups that the users operate must also evolve when their needs shift.

An example of that is COE, a community of experts of Dassault Systèmes technology solutions. For its first 30 years, COE was primarily serving professionals in the aerospace and automotive industries who used a single Dassault product called Catia. After observing that its members’ needs were shifting, COE collaborated with Dassault in 2016 to expand the user group’s focus to also include other products and solutions in Dassault’s solutions portfolio. As a result, COE members now benefit from the expanded education and information exchange that COE offers. The expansion has also enabled COE to attract members from new sectors, such as the high-tech, packaged goods, architecture and medical device industries. As an added benefit, COE members are providing Dassault with additional feedback on a wider range of its products, which in turn is fueling new innovations from the company.

Deliver up-to-date perspectives. The technology marketplace today is full of studies, data and feedback that can be confusing—even somewhat paralyzing when conclusions conflict— to those operating in the industry. In the technology world, a user group serves as the primary, informed source about a particular technology.

User groups are uniquely positioned to sift through the noise, extract the most relevant and important information, and provide unbiased views, analysis and advice about products and solutions.

The Independent Oracle Users Group (IOUG), which has represented the voice of Oracle technology and database professionals since 1953, is committed to delivering context—not just content—to its members succeed in their jobs. For example, in 2016 IOUG’s in-depth review of research about cloud technology usage uncovered that most Oracle users wanted a hybrid of storage solutions that combined cloud and on-premises servers. IOUG presented its report to Oracle executives, who are taking the findings into account as they evolve its product offering.

Adapt for the next generation. User groups are moving rapidly to create membership options, education, mentoring programs and networking opportunities that meet the needs of their younger members. On a macro level, a user group can bring attention to the career opportunities and the workforce’s education needs in the user group’s particular field. On a micro level, a user group can work with educational institutions to establish curricula and related coursework to ensure students develop specific technical skills that are needed in the workforce.

For example, for 60 years SHARE Inc. has served users of enterprise technology in mainframe computing—the backbone of the airline, insurance and banking industries, among others. But as educational institutions shifted their focus to newer technologies, SHARE’s leadership was concerned that this would leave its industry without a qualified workforce. SHARE filled the gaps by providing education, training and mentoring for the next generation of mainframe specialists. In one instance, SHARE is partnering with North Carolina Agricultural and Technical State University to launch a mainframe technology education and internship program for women and minority students—the first of its kind. SHARE will help lead the program’s content development, ensuring that a diverse educational base is part of the future of mainframe technology.

Leaders of technology user groups need to be skilled at anticipating and evaluating marketplace changes and opportunities quickly and decisively. Adapting a similar mindset can be powerful for all associations looking to ensure their relevance and secure their long-term futures.

1. Consider the impact on future generations

The infusion of younger members is obviously crucial to the sustainability and livelihood of associations. To develop a program that builds a bridge from today’s younger generations by offering membership and other opportunities, the Financial & Insurance Conference Planners (FICP)— an association that provides access to education, experience and resources—targeting the needs of financial services and insurance meeting planners from across North America—partners with Junior Achievement (JA). JA is dedicated to inspiring and helping kids prepare for viable career paths. In addition to a single activity—hobby bears—that JA, students supported by the organization can attend the FICP Annual Conference either in a back-stage capacity where they gain exposure to the hospitality industry, or as speakers to gain public-speaking experience. To demonstrate the impact of these efforts, a former JA student who is now a successful travel agent in the hospitality industry presented at FICP’s Impact JA event in 2018. JA and FICP had on her career choice and professional achievements.

2. Give back while networking

If you’re going to host network¬ing sessions during your conference, consider adding a philanthropic element. Because event attendees have limited time and are often looking to complete a checklist of items before they leave town, why not offer them an opportunity to have fun, do good and network at the same time. Along with its support of JA, FICP also hosts activities on its tradeshow floor that allow attendees to do these three things by volunteering on-site. Most recently, this included a Build-A-Bear Workshop where participants could stuff and dress teddy bears that were donated to a children’s hospital. In addition, the association arranged paint-by-number murals for attendees to paint in the registration area and again at the evening event. The murals were also donated to a children’s hospital.

3. Identify an umbrella cause

Many corporations decide to support a certain type of philanthropic initiative that dovetails with, or is complimentary to, its business strategies. Similarly, associations can adopt an area of good work that they know will resonate with their membership. Having a consistent thematic in terms of what cause benefits from donations and volunteer work, rather than one-off, fragmental philanthropic initiatives here and there, can result in highly appealing event elements that truly matter to members. For some organizations, choosing this area may be easier than others. For example, an organization whose members work in a children’s health sector may direct all of their efforts to local children’s hospitals in the cities their events visit. For other associations, it may require boards-level brainstorming to pinpoint a cause-based strategy that aligns with the underlying industry or values of the organization.

At their core, associations seek to make the world a better place. Adding a philanthropic layer to your events can be a natural extension of this, and will serve as a means of exemplifying the great and meaningful work that your association does in an arena where humanitarian efforts and giving back to the community are top of mind for everyone.
One of the Greatest Jobs and Best-Kept Secrets on Earth

The time has come for association work to get the attention it deserves. According to experts including Harvard Business School’s Rosabeth Moss Kanter, people want to work for organizations where they feel that they’re making a meaningful difference in the world. Associations provide a unique opportunity for professionals to do just that, by:

- Advocating for businesses, industries and professions
- Helping to create and protect jobs
- Increasing product and workplace safety
- Enhancing healthcare patient outcomes
- Advancing new discoveries that save and improve lives
- Increasing the reach and effect of technology solutions

Associations also provide tremendous opportunities for individual growth, at all experience levels. Consider the opportunity to work directly with accomplished and influential industry leaders who serve on their respective association’s board of directors or on committees. This type of exposure to valuable professional resources and possible mentors from all walks of life is profound, and unique to association work.

Association work also provides an exceptional opportunity for those who are fulfilled by serving others. Interestingly enough, contributions to others in this manner – as well through other forms such as volunteering and donating money and even thinking about doing good – have been shown to provide powerful physiological and neurological benefits. Eric Langshur and Nate Klemp, Ph.D., note a variety of scientific studies supporting that conclusion in their book, “Start Here: A Groundbreaking, Science-Based Program for Emotional Fitness.” So association work could actually make one healthier and happier!

Despite all of these advantages, the awareness of association work as a powerful option is not what it might be. A recent study from the American Society of Association Executives Foundation highlighted the variety of career paths that an association’s chief staff officer – its CEO – took to get to his or her role. Interestingly enough, only 11 percent planned on becoming an association CEO since early in their career.

In addition:

- 30% fell into association work and eventually decided to become an association CEO without a specific association in mind
- 29% became an association CEO after working in the profession or industry the association represents
- 20% moved to the association industry after being a leader in another sector
- 12% always planned to become a CEO, but not necessarily of an association

As an industry, we often create and advocate programs and initiatives celebrating the impact of those working in the industries served by associations. Perhaps it is time to highlight and celebrate the opportunities within our own industry to our next generation of difference makers.
Full-Service Management

Research Chefs Association – Founded in 1996, RCA is the premiere source of culinary and technical information for the food industry, with a professionally diverse membership including chefs, food scientists and other industry professionals who are shaping the future of food research and development. RCA’s members are the pioneers of the discipline of Culinology® – the blending of culinary arts and the science of food.

The National NeedleArts Association – Founded in 1974, TNNA is a community of business professionals dedicated to the advance- ment and promotion of needle arts – textile crafts and decorative sewing.

American Association of Occupational Health Nurses – Founded in 1942, AAOHN serves 4,000+ members dedicated to advancing the health, safety and productivity of domestic and global workforces by providing education, research, public policy and practice resources for occupational and environmental health nurses.

American Association of Sleep Technologists – AAST is the premier allied health membership association for professionals dedicated to improving the quality of sleep and wakefulness in all people. Established in 1978, the association is committed to promoting and advancing the sleep technologist profession while meeting the professional and educational needs of its members.

Outsourced Services

A selection of the clients that partnered with SmithBucklin in 2016 for Outsourced Services:

- American Association of Hip and Knee Surgeons [Event Services]
- ASIS International [Education & Learning Services]
- Council of Multiple Listing Services [Financial Management & Accounting Services, Information Technology Services]
- Engineering in Medicine and Biology Society [Event Services, Education & Learning Services, Information Technology Services]
- Great American Cake and Sugarcraft Fair LLC [Sales Services]
- Israeli-American Council [Event Services]
- Jhpiego [Event Services]

MILESTONE ANNIVERSARIES OF OUR CLIENT ORGANIZATIONS

The following client organizations celebrated milestone anniversaries in 2016, reflecting their longevity and endurance. SmithBucklin is honored to have the opportunity to serve these associations and, in a small way, contribute to their successes.

20 YEARS
- Clinical Research Forum

35 YEARS
- International Society for the Study of Xenobiotics

45 YEARS
- North American Association of Floor Covering Distributors

70 YEARS
- Print Services & Distribution Association

25 YEARS
- United Soybean Board

40 YEARS
- Clinical Laboratory Management Association

60 YEARS
- American Bearing Manufacturers Association

100 YEARS
- Restoration Industry Association

30 YEARS
- Wallcoverings Association

150 YEARS
- District of Columbia Dental Society

NEW CLIENT ORGANIZATIONS

2016 SMITHBucklin NEWS and HIGHLIGHTS
SmithBucklin was the focus of the Huffington Post article, “From Popcorn to Purpose: Talking Association Management with SmithBucklin.” In it, President & CEO Matt Sanderson discussed SmithBucklin’s purpose-led mission, the relevance of associations and what an association management company does.

“What makes our company so unique is that our people are driven by the desire to serve others.” – Matt Sanderson

THOUGHT LEADERSHIP

Following are a selection of other articles and multimedia examining the issues facing the association industry that prominently featured or were authored by SmithBucklin employees:

- **Convene**: Matt Sanderson – “5 Questions for SmithBucklin President Matt Sanderson”
- **Association FORUM**: Carol McGury – “International Events: Dipping Your Toe or Jumping All In?”
- **Meetings & Conventions**: Tom Myers – “A New Spin on Sponsorships”
- **HFMA Leadership**: David Schmalz – “Why You Should Answer the Call to Serve as a Volunteer Board Member”
- **Successful Meetings**: Chris Ballman – “How to Resuscitate a Tired Association Education Program”
- **Association FORUM**: Dave Weil – “Going the Extra M.E. (Magic ideas that lead to Engagement”
- **BizBash**: Carol McGury – “5 Chicago Event Professionals Inducted into BizBash’s Hall of Fame”
- **Association News**: Sara Kolovitz – “Creating New and Unique Event Sponsorships”
- **Becker’s Hospital Review**: Kaye Englebrecht – “Why Face-to-Face Networking Among Nurses is Vital to Healthcare”
- **ACHE Early Careerist**: David Schmalz – “Engage in Your Association”
- **MeetingsNet**: Carol McGury – “Create a Global Meeting Business Plan”
- **Association Conventions & Facilities**: Anita O’Boyle and Cynthia Corvis – “Meet the Logistical Challenges of International Event Planning”
- **Connect Corporate**: Cellia Morales – “10 Tips for Creating Educational Programs for International Audiences”
- **Association Conventions & Facilities**: Chris Ballman – “Active Learning”
- **PCMA TV**: Carol McGury – “Key Trends in Medical Meetings”
- **HFMA Leadership**: David Schmalz – “Professional Associations Help Develop the Next Generation of Healthcare Leaders”
- **Freeman Blog**: Dave Weil – “Five Quotes from Marketing Leaders to Inspire Your Event Measurement Program”
- **Associations Now**: Chris Ballman and Cassie Thompson Palacios – “Next-Gen Appeal: Making Meetings for Millennial Members”
- **BizBash**: Carol McGury – “My Rules”
- **Association Conventions & Facilities**: Cameron Curtis and Perry Juliano – “Bring Value & Engagement to Health Care Conventions”
- **IAEE Midwestern Chapter Blog**: Cassie Thompson Palacios – “How Great Customer Service Can Increase Your Bottom Line”

SPEAKING ENGAGEMENTS

Following are a selection of the impactful speaking engagements SmithBucklin employees participated in during 2016 that reached audiences around the world.

- **Chris Ballman and Lydia Kamicar** presented “A Session on Sessions” at the American Society of Association Executives’ Annual Meeting – Salt Lake City, Utah
- **Carol McGury, Julie Ferry and Brian Langerman** presented “How to Fight — and Win! — The Relevancy Battle for Your Organization” at the Council of Engineering and Scientific Society Executives’ leadership conference ACCESSE16 – Omaha, Neb.
- **Freeman Blog**: Dave Weil – “5 Quotes from Marketing Leaders to Inspire Your Event Measurement Program”
- **Associations Now**: Chris Ballman and Cassie Thompson Palacios – “Next-Gen Appeal: Making Meetings for Millennial Members”
- **BizBash**: Carol McGury – “My Rules”
- **Association Conventions & Facilities**: Cameron Curtis and Perry Juliano – “Bring Value & Engagement to Health Care Conventions”
- **IAEE Midwestern Chapter Blog**: Cassie Thompson Palacios – “How Great Customer Service Can Increase Your Bottom Line”
- **Michael Payne** spoke on a panel regarding “Association Management Companies – A Focused Look at Challenges & Solutions!” at IMEX Europe – Frankfurt, Germany
- **Carol McGury** spoke on a panel regarding “‘Key Trends in Medical Meetings’ at the Professional Convention Management Association’s Convening Leaders conference – Vancouver, British Columbia, Canada
- **Cassie Thompson Palacios** spoke on a panel regarding “Youth Professionals” at International Association of Exhibitions and Events – Anaheim, Calif.
- **Carol McGury** spoke on a panel at the Business Events Strategist meeting – Austin, Texas
- **Mark Thorsby** presented on governance at the Wisconsin American Society of Association Executives’ Conference – Milwaukee, Wis.
- **Cynthia Stubbs** presented “Partnering with Medical Facilities” at an INCON Healthcare Meetings University workshop – Gothenburg, Sweden
- **Carol McGury** spoke on a panel regarding “Rethinking Association Events in the Age of a Seller’s Market” at BizBash Elevate – Washington, D.C.

BOARD FORWARD

Board Forward is SmithBucklin’s year-round source for thought-provoking, relevant and useful content for volunteer board members. Now in its fourth year, the e-newsletter draws on the knowledge, experiences and advice of a wide variety of subject-matter experts to offer valuable boardroom insights to more than 21,000 readers.

Its articles, studies, interviews, tips and case studies cover the following topics: governance; board culture; roles and structure; international boards; leadership; fiduciary responsibility; committee structures; leading best practices; board orientation; board succession; diversity; legal responsibility; bylaws; antitrust; and strategic planning.

Notable articles in 2016 were:

- **There’s Always Time for Talent**
- **The Five Cs of High-Functioning Boards**
- **How Board Members Can Help Generate Growth**
- **Principles of High-Functioning Teams**
- **Acquired Inattention**
- **Seven Questions to Ask About Your Event**
- **Boards and the Benefits of Being Prepared**
- **Expert Advice for Engaging New Members and Keeping Them**

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Recognizing the integral role that leadership plays in ensuring an organization’s enduring success and vitality, former SmithBucklin CEO and current Chairman of the Board Henry Givray created two high-impact leadership learning programs. Since the inception of both programs, Henry has served as lead-facilitator and continues to do so today. The content and curriculum of both programs are based on a leadership framework and underlying principles developed by Henry.

### Leadership Learning Forum

Launched in 2011, the SmithBucklin Leadership Learning Forum (LLF) is an intensive nine-month program that each year stimulates and inspires the individual learning and personal growth of a select group of 16 to 18 SmithBucklin employees in order to grow leaders from within. Now entering its seventh year, the program was envisioned as a purposeful, disciplined and sustainable approach to creating a growing community of leadership students who model desired behaviors and practices.

“The LLF was not only worth the focused commitment and energy, but it provided me with the tools to be a better executive director, mother and spouse. Through in-depth class exercises focused on self-discovery I was able to define my core values and understand personal motivators and energizers. Having gained this knowledge allows me to better serve my clients, team and family with a renewed sense of enthusiasm.”

— Jeff Hartney

Director, Business + Trade Industry Practice

“From the outset, the LLF was a once-in-a-lifetime opportunity. The skills and knowledge I learned will ensure that I fulfill my responsibilities in my career and volunteer efforts. The self-reflection and self-discovery has made me a better person and a better leader. The journey was a gift of learning and life-long friendships; it has left a footprint on my life.”

— Diane Meldi

Director, Medical Staff Services, Cincinnati Children’s Hospital Medical Center

### Leadership Institute

Launched in 2013, the SmithBucklin Leadership Institute is an intensive, high-impact, six-month program that exposes a small, diverse group of volunteer board members to leadership concepts, principles and guidelines. The program’s overarching goal is to build leadership capacity within the boards of SmithBucklin’s client organizations. In 2016, 16 individuals — representing diverse industries and fields — participated in the SmithBucklin Leadership Institute.

The program has generated substantive, meaningful personal growth for its participants, who have also made deep commitments “to pay it forward” to their associations and employers. Participants have also forged enduring relationships with each other.

“What I gained was not just leadership skills but exponential personal growth. I am a better person and a better leader, and the journey has only just begun. The gift of participating in the Leadership Institute is simply priceless.”

— Michelle Day

MSN, RN, CCRN | Team Leader, Comprehensive Liver Center, Hartford Hospital | Society of Gastroenterology Nurses and Associates, Inc.

“The Leadership Institute was a once in a lifetime opportunity. The skills and knowledge I learned will ensure that I fulfill my responsibilities in my career and volunteer efforts. The self-reflection and self-discovery has made me a better person and a better leader. The journey was a gift of learning and life-long friendships; it has left a footprint on my life.”

— Diane Mold

CPCS, CPSSM, MBA | Executive Director, Medical Staff Services, Mercy Health | National Association Medical Staff Services

For more information and details, please visit www.smithbucklinleadershipinstitute.com.
The SmithBucklin corporate management team is made up of 15 individuals who have diverse, yet complementary backgrounds and skills, as well as substantial collective experience in association management and business. They are passionate about inspiring and empowering SmithBucklin colleagues to deliver on all of our commitments to the client organizations we serve.

**CIRCUIT 2017**

**Leaders Forum 2017**

**AUGUST 8 + 9, 2017 IN ROSEMONT, ILL.**

Contact your executive director to register for the 2017 Leaders Forum.

Quotes from Leaders Forum 2016 attendees:

“This was an awesome event for our association. Never in my time with our association have we been offered training and insight like this to be a better board, and learn how to function and work together better to lead our association.”

“Attending the Leaders Forum is energizing and inspiring. It’s one thing to know that there are many challenges to overcome in a volunteer leader position, but comforting to find other volunteer leaders who face the same challenges and learn so much about addressing them.”

**Art of the Sale: Persuasion and Influence Tips for Development Professionals (and Everyone Else!)

This session will help participants become more persuasive and influential in their professional and personal lives, a skillset that is vitally important for everyone in a leadership role within an association.

**The Science of Happiness

This session will include cutting-edge research from the field of positive psychology to provide participants with practical and easy ways to increase their own psychological well-being.

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Our mission is to achieve the missions of the client organizations we serve.