HERE COMES THE SUN

NEXT MEETING, BRING SUNSHINE TO THE TABLE

Zip, swing, stretch, climb and ride to moments that turn into memories. Your attendees might return to the office with a little sun on their face and grass in their shoes, but they’re sure to go back inspired, energized and engaged. With twelve resorts including Vail, Keystone, Park City and more, your most memorable meeting will delight you with it’s ease of arrangement and seamless flow. You pack the sunscreen. We’ll take care of the rest, beginning to end.

TO BE INSPIRED, VISIT VAILRESORTSMEETINGS.COM OR CALL 970.754.0055
Executive Edge is the official magazine of CSAE, Colorado Society of Association Executives. CSAE brings together association leaders to foster professional and personal excellence through unique learning opportunities that inspire members to achieve more and guide associations into the future.

Copyright 2020 Colorado Society of Association Executives

CSAE EDITORIAL COMMITTEE:

MARILEE YORCHAK, CAE, CO-CHAIR
Digital Analytics Association
myorchak@digitalanalyticassoc.com
303.728.4395

LESLIE SHIVERS, CAE, CO-CHAIR, CO-EDITOR
Association Pro to Go
leslie@associationprotogo.com
303.359.2751

LANCE RITCHLIN, CO-EDITOR
R-Star Productions, Inc.
lritchlin@gmail.com
303.842.5559

FRANCINE BUTLER, PHD, CMP, CAE
Empressa Consulting
francine@empressaconsulting.com
303.725.9155, ext.105

MELANIE PENOY-PEREZ, SME
Penoyar-perez@smenet.org
303.948.4266

BECKY ROLAND, CAE
Phoenix AMC
broland@phoenix-amc.com
303.551.3266

MOLL Y SAUSAMAN
American Beekeeping Federation
msausaman@abfnet.org
404.760.2875

LAURIE SHIELDS
Laurie Shields Design
info@laurieshieldsdesign.com
303.777.6354

CSAE EXECUTIVE DIRECTOR
JOAN TEZAK, CAE, CMP
JT@csae.org

CSAE PRESIDENT
ROBERT GOLDEN, CAE
REGOLDENLLC
2790 South High Street
Denver, CO 80210
rgolden@waterdesignbuild.org
303.641.0550

PUBLISHED BY:
Colorado Society of Association Executives (CSAE)
8690 Wolff Court, Suite 200
Westminster, CO 80031
303.650.0301 office
303.650.1450 fax
www.csae.org

SALES CONTACT:
KATIE WHITE
The Wyman Company
352.388.7031
kwhite@thewymancompany.com

WE’RE A MAIN STREET, NOT MAINSTREAM KINDA TOWN

BRECKENRIDGE C O L O R A D O
800.796.2825 | sales@gobreck.com
BreckMeetings.com

WE’RE A MAIN STREET, NOT MAINSTREAM KINDA TOWN

BRECKENRIDGE C O L O R A D O
800.796.2825 | sales@gobreck.com
BreckMeetings.com

WE’RE A MAIN STREET, NOT MAINSTREAM KINDA TOWN

BRECKENRIDGE C O L O R A D O
800.796.2825 | sales@gobreck.com
BreckMeetings.com

WE’RE A MAIN STREET, NOT MAINSTREAM KINDA TOWN

BRECKENRIDGE C O L O R A D O
800.796.2825 | sales@gobreck.com
BreckMeetings.com

WE’RE A MAIN STREET, NOT MAINSTREAM KINDA TOWN

BRECKENRIDGE C O L O R A D O
800.796.2825 | sales@gobreck.com
BreckMeetings.com

THE WYMAN COMPANY
Helping associations maximize their non-dues revenue potential
Advertising, sponsorship and exhibit sales
Full content and publishing management
Market intelligence
www.TheWymanCompany.com
cpopper@TheWymanCompany.com
WHAT A YEAR TO BE YOUR CSAE PRESIDENT!

I am sitting here reflecting on a year that started out with such promise and concluded with an ending that no one could have ever scripted. My goal as your president was to make CSAE the place to be...excellence by association. Your board came together in September and laid out a plan for the 2019–2020 year. Our to-do list included revising the bylaws, updating our policies and procedures, and working with the editorial committee to rename the CSAE publication. Additionally, I tasked the board to revise CSAE’s strategic priorities that had been developed in 2016 and were long overdue for an update. Your board responded in record fashion with all the items checked off by February of this year. While the board worked behind the scenes, JT and Michael Brandt rolled out the CSAE app to create an easy, one-place stop-and-shop for all things CSAE. Things were humming along, the board and the Program Committee were excited to move into the last quarter of the CSAE calendar year by being able to concentrate on the 2020 Annual Conference. Then it happened—COVID-19. Overnight everything changed. Association executives took on the role of counselors and crisis managers for their members. They rewrote budgets for their boards. Our hospitality members have moved from having an excellent year in 2019 to hoping to see recovery by 2022 (Hotel News Now, May 28, 2020). All the planning for the Annual Conference suddenly became obsolete. Where do we go from here? was the question that everyone asked.

Within 48 hours, CSAE had developed a plan on where the association was going largely due to the nimble thinking of your Executive Director, Joan “JT” Tezak. The Annual Conference was rescheduled, then retooled to the Summer Camp virtual event that will be taking place on July 9–10 with add-on sessions through the month of August. Teatime was developed in April, giving members a chance to get in the trenches with each other and talk through the challenges they were facing. Membership Happy Hours went virtual to give members a break from the home office life. Life at CSAE became a series of pivots and I had a front row seat watching JT turn them into pirouettes.

I have been proud to represent CSAE in a time like no other. I learned from some of the best in the business, working with what I proudly call “my” board. I could not have done it without their support. I have lived by the mantra that there is no “I” in team, and this was never more apparent than these last few months. I loved serving as your president and know that going forward the association is in great hands under the leadership of Bob Golden, your 2020–2021 president. Stay safe, stay well and I hope to see you soon!

Take care,

Rhonda Scurek
At the American Beekeeping Federation (ABF), we’ve recently engaged in discussions about whether live webinars are appropriate for providing education to beekeepers. ABF members do not generally sit behind a desk at a computer for eight hours a day. Like everyone in agriculture, beekeepers work every day from dawn to dusk (and then some) out in the field tending to their bees and extracting honey. It’s nearly impossible to gather more than a couple dozen beekeepers at the same time on the same day for a live presentation. The question we faced became, “If webinars are not convenient, why bother?”

I’ll admit that my first reaction was, “Let’s think about that.” In the moment, I couldn’t help but feel a little relieved over the prospect of removing something from staff’s overflowing platter. But ABF provides beekeeping education—this is one of the very reasons the organization exists! After a brief reflection, I knew “bother” was not the issue here. It’s the “convenient” piece that needed attention.

Is Terminology to Blame?

ABF amassed an extensive library of evergreen educational content by recording webinars. For a time, we made these recordings available under the label of “archived webinars.” Regardless of the method and frequency of marketing this content, there was little traction with our audience. We needed a new solution.

According to IEEE GlobalSpec Media Solutions, 84 percent of B2B audiences prefer replays over live webinars.
Anecdotally, we at ABF found an even higher percentage of our members agreed. Nevertheless, we had usage metrics indicating otherwise. ABF’s live webinars captured a larger audience (albeit small) than any given archived webinar. With the help of an informal focus group, we learned that the words “archived” and “webinar” both resonated negatively with ABF members. To further complicate matters, focus group participants grappled with whether ABF should call what we do “education” or “training.”

The internet has no shortage of opinions, advice and sales tactics when it comes to the subject of framing webinars to increase reach. What the facts show is that webinars are a tried-and-true tactic for disseminating information that has not passed its heyday.

A lot of work went into creating each ABF webinar. The subject matter is still relevant, and the information provided is still solid and timely. Upon deciding that abandoning ABF’s webinar program would be a mistake, we looped in professional educators and marketers within the beekeeping industry to help filter out the noise and devise a plan to repurpose our educational content rather than repackaging it with a different label. To this end, here are the ways ABF converted its waning webinar program into multimodal educational resources while accommodating various learning styles.

**On-Demand Education**

Simply referring to ABF’s archived webinars as “on-demand education” has impacted our click rate both in email and on the ABF website. Beyond that, we now deliver the recordings with an automated system for an improved user experience and better usage analytics. To cater to visual learners, we tried developing graphics to replace text-heavy slides while keeping the original audio.

**Magazine Articles**

If your association has a magazine, newsletter or e-newsletter, think about transcribing webinar content and repurposing it as written articles. Depending on the subject matter, you may have one, two or even more articles contained in a single webinar. ABF now has a robust repository of evergreen articles and sidebar features that we sprinkle in with the news of the day.

**Advanced Content**

At ABF, our advanced content is in the form of how-to guides. Other forms of advanced content that your members may find useful are e-books and whitepapers. Any of your webinars that involve a deep dive into the subject matter are great sources of advanced content. In terms of beekeeping, we’ve been able to take step-by-step webinar presentations and repurpose them as timeless, downloadable resources that our membership has been fawning over. From a marketing perspective, ABF’s advanced content has generated many new leads from prospective members.

**Podcasts**

Podcasts are popular among beekeepers and modern commuters alike. According to a study by Edison Research, 64 percent of people surveyed said they had listened to a podcast in their vehicle, and 37 percent had listened while riding public transportation. Repurposing webinar audio tracks as podcasts is an easy process that gives your organization yet another method of gaining authority within your industry. Some webinar scripts may need to be re-recorded to better suit a podcast format, but re-recording is a lot less time consuming than writing an entirely new script. Audiences love podcasts because they cater to the listener, and you don’t have to stop what you’re doing to start learning.

**Social Media**

We are currently in the process of reviewing our data-heavy webinars and transforming content into infographics and other bite-sized chunks for social media. CSAE does a wonderful job of conveying important information through the infographics featured in each issue of Executive Edge. One of your association’s webinars will probably lend itself perfectly to use in an infographic. Having jumped into the Instagram sphere, this has become a high priority for ABF.

“Simply referring to ABF’s archived webinars as ‘on-demand education’ has impacted our click rate both in email and on the ABF website.”

**YouTube**

With a lot of inaccurate information about beekeeping on YouTube, we at ABF are working on creating YouTube videos containing reputable information from a trustworthy source. Much to our surprise, quite a number of our webinars can be used as-is in this effort to teach the public and inexperienced beekeepers about how to keep bees healthy and colonies strong. This undertaking has required a lot of resources, and uncovering our built-in content has turned out to be a hidden treasure.

Repurposing webinars lends versatility to your association’s education repertoire. The ABF audience responds to content in ways quite different than what I would have expected before this experience. We’re also reaching new and different audiences simply because everyone learns information differently—a principle most of us know (but do we put it into practice?).

Working smarter, not harder sometimes amounts to simple lifehacks that give minutes back to your day. Other times, you’ve invested a lot of time and energy into creating something that has the potential to give back a lot more than minutes. Your organization may be missing a valuable segment of your prospective audience without diversifying its education offerings. The content is there for the taking.

Molly Sausaman is executive director for the American Beekeeping Federation.
LEARNING VS. TRAINING:
DIFFERENT BY DESIGN

By Lance Ritchlin
Today’s association executives orchestrate many components necessary to plan and implement effective education programs. Historically, learning and training were distinct concepts. Wealthy, aristocratic students attended universities to learn the liberal arts. Tradespeople sought training from opportunity schools or became apprentices through their guilds or unions. In today’s knowledge-based economy, the terms learning and training often seem interchangeable. But are they?

Kyle Jordan, Ed.M., MS, CAE, CMM, CMP, is Managing Director, Learning and Conferences, for the Denver-based Financial Planning Association. He sees a distinction between modern learning and training. “With learning you’re really looking to build upon a theory or foundation,” he says. “With training, you’re learning a skill or taking theory and putting it into practice.”

Mariah Feno, Educational Developmental Specialist for the American Snowsports Education Association (known as PSIA-AASI), says her association augments specific training by offering more general learning opportunities. PSIA-AASI prepares skiing and snowboarding instructors to attain certifications in their chosen areas of specialization. The organization’s certification standards provide a national training framework, although educational needs vary among the organization’s eight regions.

“I started making videos for eLearning courses, which kind of led me down the path of learning,” Mariah says. Now, she works with her organization’s volunteers to develop education and training courses and maintain the eLearning management system.

**Designing Education Courses**

Designs for learning and training share some characteristics but also differ in some ways. For both, Mariah advises course designers to begin by asking, “Why are you creating the content, who's your audience?” Once you know your why, then it’s easier to execute what you’re trying to make and how you’re trying to make it.”

Her stakeholders are “very vocal and very good about talking to us about what they want to see with their education.” The organization also relies on task force members to provide input for given areas of specialization, such as alpine, freestyle, cross country and others.

Kyle points out that, “Offering education is a core part of who we are as an association, but it’s also a revenue generator.” He approaches educational program development by first exploring gaps in the marketplace—which of members’ educational needs are not being met satisfactorily? “The second piece of that is, ‘What are new or emerging trends that we can be the leader on or identify in our profession? And how can we get that content to market in a way that people will be interested to explore further?’

Surveys, such as FPA’s annual benchmarking study, help determine member wants and needs. The FPA team looks for trends and seeks to identify their own strengths and weaknesses.

“Our marketing team is instrumental at helping us determine how to communicate the value proposition to the member because quite frankly…the marketplace is exceptionally competitive,” Kyle says. “You can go out and buy continuing education for as low as $9.95 a credit hour.” The competitive market puts pressure on FPA to deliver content related to “where the profession is going, not where the profession has been.”

Kyle and Mariah believe organizations should keep educational outcomes in mind. Training is usually more task or performance oriented. Training outcomes usually involve creating an intervention to facilitate a positive change in the participant’s behavior. Such outcomes and ROI are relatively easy to assess. Can students do the task after being trained? Do they make fewer mistakes? Can they pass an exam? Do revenue or productivity improve?

In contrast, learning outcomes are more mercurial. “When we’re looking at education, we’re really looking at acquisition of knowledge, but it may not facilitate a behavior change,” Kyle says. Learning often creates more well-rounded leaders and professionals by providing context to content. Kyle says it teaches participants “things that are beyond just the technical components of the profession,” such as confrontation skills, emotional intelligence, conflict resolution, leadership and a better understanding of diversity and inclusion. Learning often pays dividends in critical thinking, confidence and decision making. Its success and ROI are usually harder to measure.

Associations commonly measure participant satisfaction. Kyle would prefer having learners respond to a series of assessment questions in a specific format: “I can define…I can differentiate…I understand…. “ Assessing responses before and after learners take a course could help associations tweak course designs. He also sees value in long-term assessments that determine how much information learners retain and implement.

“Learning often creates more well-rounded leaders and professionals by providing context to content.”

continued, p 10
Personalizing Learning Experiences
Many associations struggle to accommodate differences among learners and trainees. There are three familiar learning styles: aural, visual and kinesthetic (related to movement or hands-on education). Factors such as age, cultural background, technical ability and personality traits—introverted and extroverted, for example—also create uneven learning environments.

Personalizing training and learning remains a goal. “I don’t think we’re there yet,” Kyle says. “It’s definitely an aspirational place for us.” FPA does extensive beta testing of its educational programs to determine how well they work for diverse audiences. In the next two years, FPA will audit their programs to determine what changes should be made to accommodate diverse users in terms of delivery, access and format. Should quizzes be embedded in content or included at the end? How can you serve learners who require larger screens or larger type?

Staying Agile
Shelf life is important to educational programming. “Things change so quickly that by the time we generate a course, it might already be outdated,” Kyle says. The COVID-19 pandemic could have long-term effects on program delivery. Many associations are scrambling to make up revenues lost when face-to-face events were cancelled. PSIA-AASI members love working outdoors, and training on ski slopes is important to them. “With the COVID-19 we had to go online, so we’ve been doing a lot more webinars lately,” Mariah says.

“It absolutely exposed some weaknesses in our education delivery,” Kyle says. Until recently, FPA’s learning management system struggled with high-volume use. Learners found a catalog of 592 educational items overwhelming. FPA reduced their catalog to 136 items and is adopting learning management that will provide a better user experience.

Making the Commitment
“Learning and training have to be baked in as a core part of your culture. If it is not, people will leave,” Kyle says. Organizations often worry about investing heavily to train employees who might leave. Kyle thinks a better question is, “What if you don’t pay to train them and they stay?” There are big benefits to employee satisfaction and productivity. One good idea that an employee gleaned from outside training could turn an association’s fortunes around.

“Your stakeholders are not only your members,” Kyle says. “Your stakeholders also are your staff and your team members, and undereducating them or not placing a value on education and training only hurts the organization and hurts the professional,” he says. “I will cut just about anywhere else in my budget before I will cut pro-people dollars. It is a critical part of being a leader.”

KEY TAKEAWAYS
1. Set effective programming goals. Survey your members to find out what they want and need. Research your market carefully. Identify gaps in what is currently offered and stay alert for trends that anticipate future educational needs.
2. Focus on outcomes. Will you be training learners to perform specific tasks such as using a database, applying industry standards or operating equipment? Is the goal to have members pass a certification exam or become more well-rounded leaders? Are you orienting board members or helping members navigate your conference app? Are you trying to change learners’ behavior or change their minds?
3. Assess results. If your goal is to help members pass a certification exam, compare their passage rates to those of other exam takers. Not all outcomes are easy to measure. One method is the teach-back: ask learners to summarize their takeaways or trainees to repeat the steps of the process they were taught.
4. Plan your delivery. Are your learners scattered across the country or within an hour’s drive of your office? Should you deliver programs online, in a classroom, at an annual conference, at your members’ workplaces or through your association’s chapters?
5. Orientation is not training. Orientation is an overview or glimpse of responsibilities. Training is usually more intensive, technical and task specific. It relies on repetition, assessment and periodic follow-up. Post reference materials on an intranet or accessible file. Don’t make learners waste time Googling answers. Provide trainees access to mentors or “super users.”
6. Refresh and revisit. Training goes stale unless learners have an opportunity to use it right away. Technology, standards and regulations change over time. Build refresher training into your plans, especially when you experience staff turnover.
7. Personalize education. People have varied learning styles and backgrounds. Combining elements such as storytelling, evocative graphics, case studies, role playing, music and hands-on activities can broaden appeal and effectiveness of your learning programs. When possible, give learners choices.
8. Create a learning culture. Unless you prioritize learning and training, they will likely be early casualties of budget cutting. Incentivize employee training and acknowledge volunteers who complete training modules. Build training goals and periodic skills assessments into employee reviews.
9. Stay agile. Expect the unexpected. The dotcom bust of the late 1990s, the 9-11 attacks, the Great Recession in the late 2000s, and the recent Covid-19 pandemic trashed many plans for national conventions, forcing associations to move more education online—or cancel it altogether. New legislation, industry trends and board agendas can gut your content. What’s your Plan B?

Lance Ritchlin is co-editor of CSAE’s Executive Edge and works as a writer, editor and marketing consultant for R-Star Productions Inc. He can be reached at lritchlin@gmail.com
Colorado Springs isn’t the inspiration, YOU are. Our spaces are just empty rooms without you to fill them with innovative ideas.

LEARN MORE AT VISITCOS.COM/MEET

THE LOCALS’ CHOICE
for GAMING, DINING, LODGING

BEST CASINO

BEST RESTAURANTS

BEST HOTEL

NEW GAMES

Inspiration awaits

Colorado Springs isn’t the inspiration, YOU are. Our spaces are just empty rooms without you to fill them with innovative ideas.

LEARN MORE AT VISITCOS.COM/MEET
THE BUSINESS AND STRATEGY OF ASSOCIATION EDUCATION

By Debra A. Zabloudil, FACHE
In the world of association education, many competing demands exist. Members want products and services that meet the need of their current professional challenges, and they want you to anticipate what they will need next. And that was before COVID-19. Now, with the significant change of landscape in which we operate as association professionals, we are more pressed than ever to be relevant to members, but in a whole new way. The sand is shifting underneath ALL of our feet.

Consider what your members are currently experiencing:
- Some have lost beloved jobs.
- Others may have to leave the profession to take a job in another industry.
- Everyone is feeling stress due to the significance of the unknown.
- Planning is difficult because we don’t truly know what the next month or quarter will bring.
- Some have had health issues, or have even experienced losing someone they love.

While we don’t know what is ahead, we do know the road won’t be easy. But that is why we lead. We lead because our members need guidance, resources, and direction. We lead because we can make a difference in the lives of our members through education, advocacy and so much more.

So where do we begin? Strategy. There really is nowhere else to start. Whatever strategy you had in place in February 2020 must look different than what you have now. Some of you may be thinking, “Who has time to strategize? I can barely keep my head above water!” Of course. We were all in a phase of doing through most of March, April and May. We had conferences that needed to be cancelled, postponed or moved online, technologies to learn, budgets to adjust and more. But now we must strategize.

The way we educated our members likely looks different during the summer of 2020. Associations that were dragging their feet into the online world had to learn and acclimate quickly, as did their members. Associations that have been working with digital education for some time may find themselves ahead of the pack.

But we need a path forward, so let’s examine what we need to be considering right now.

Be Deliberate
There are no absolutes for what “every association” should or should not do. All products, services and practices must be run through the lens and culture of your specific association, and the industry that it serves. Some associations have a greater appetite for innovation and risk. No matter your culture, being deliberate in your decision making and backing that up with actions that support those decisions, are critical. Anything less is sloppy. Anything less is lost opportunity.

As an example, many associations made decisions during the months of peak COVID to offer educational programming at no cost. Some even offered education at no fee to nonmembers and other...
constituents. Why? Because it was the right thing to do. What does that do for the bottom line? Not much in the short term, but goodwill goes a long way when times are tough for an industry (or nation, or world). It also shows leadership, because leaders truly emerge during the difficult times. But all decisions have consequences. Consequently, your next decisions might need to be: When do we start charging again? How do we invite those nonmember participants under the tent? What might we continue to offer at no charge for our members (and perhaps others) to help them get back to business in a way that is financially sustainable for us? Which brings us to the next consideration...

Understand Your Audience

Now is the time to get clear on who you are serving. Associations can lose track of what their membership looks like over the years, and association folklore can take over if you aren’t regularly or constantly collecting and analyzing data.

One of the most important things education professionals can arm themselves with is demographic data about the members and nonmember customers for your education (which might be two different sets of demographics). It is powerful to start an Education Committee meeting (or conference design meeting) with demographics on who the program serves. Minimally, you should understand the following about your membership:

- Years as a member
- Years in practice
- Level in their organization, if appropriate
- Job title or job function
- Age range
- Geographic region

Of course, there are always other elements you may want to capture and understand as well. If your association AMS does not capture this information, or if it is incomplete, ask the right demographic questions on your next member needs survey or, better yet, on your next education needs survey. If you want to further understand demographic preferences, include those questions on your program surveys as well.

Understanding demographics is powerful, particularly after cross-tabulation, which helps the organization to truly understand its member and market niches.

‘No Margin, No Mission’

These four words have stuck in my mind since reading them, attributed to Sister Irene Kraus, founding chief executive of the Daughters of Charity Health System. Wise words. And we should know this as association executives, because we prepare budgets, watch attendance figures and look at member retention rates. We need revenue to operate and it is that revenue that allows us to keep innovating and to keep developing relevant products and services for our members.

As we look at education products, we must deliberately look at our revenue streams. A hard lesson that many have learned during COVID-19 is that it is critical to have diversified revenue streams in any association. Far too many associations have lost the only real revenue source they had when their annual conference cancelled and have had to rely on reserves or an insurance policy payout if they were lucky to be covered for this spring’s events.

That means developing a variety of content areas, aimed at a variety of audiences and with varying formats. Is it difficult to see revenue off one webinar, or one podcast or a virtual panel discussion? Create a series of offerings in any given modality and offer that to members with a price tag or sell sponsorships.

Combine a deliberate strategy with a solid plan for developing additional revenue streams, and you are on your way to a solid educational portfolio. Once these important elements have been determined, you must share the plan and execution strategy with staff, committee members and the board. Members need to understand the need for a strategy based in reality, and the need for revenue. Too many associations shield committees from these realities, and that works against the mission in the long run.

Sponsors

There is an interesting dynamic in sponsorship right now: sponsoring companies are also hurting financially due to COVID, but have seen their sponsorship opportunities dry up before their eyes. Without being able to see customers in person (either through industry events or sales calls) many are looking for ways to be in front of decision makers. While every industry and association will be different, don’t discount sponsorship just because we are in difficult times. Keep the lines of communications open, float new and interesting digital opportunities before them and try to secure sponsors in different and unique ways.

There are many associations that have historically not pursued a sponsor that didn’t have $20,000, $30,000 or even $50,000 to spend. Release yourself from the thinking of the past and really determine what will work in today’s environment. You may find greater success with smaller sponsorships. Of course, there may need to be more of these to meet the same revenue levels, but it keeps sponsors active and engaged during a difficult financial time. We may have to work a bit harder for this financial support than we have in the past.

Know Your Education Program Statistics ‘Cold’

There is nothing more deflating than watching a group of well-meaning individuals make bad decisions over and over. Why does this happen? Not because they don’t care or are working against the needs of the association, but typically because they don’t understand what has come before. Being well armed with program data (coupled with the demographic information above) will help any committee or decision-making group jump off at a point of clarity and fact.

We need to look at data to help inform decisions. Don’t say, “we tried that before and it didn’t work” and take it off the table. Say instead, “for the last five years we have had programs on that topic that didn’t draw significant attendance. Has something changed that might make this area successful this year?” If yes, further thought and discussion ensues. If no, you have your answer and it is defensible to your C-suite, the board, committees and the members overall. Projects that linger on too long with waning financials and attendance are a drain on the organization.
overall. Should the membership dues of some of our members be used to support a failing program or a pet project of a board member? Again, with data on our side we can make the right decisions and they become defensible.

Data is also powerful when working with sponsors, finding collaborators and negotiating contracts with industry partners. It might be the difference between being able to show the power and reach of the program, or losing an important opportunity.

**Differentiate Learning Opportunities for Members**

Variety is the spice of... associations. Members can get bored with the same offerings looking the same way all the time. Try new things! One of the gifts that COVID-19 has given us is that all bets are off. It is not business as usual and we are expected to be inventive, nimble and curious. Members are very forgiving during a crisis. They understand the world has been shut down, so why not allow your association to re-emerge as a more creative and member-centric version of itself? What does this mean?

- Do not cling to processes and methods of the past.
- Try new things, even if you are unsure of the outcome.
- Create a new product series, through podcasts or micro-learning, and brand it with its own unique look, feel and marketing.
- Attempt a virtual conference if you have not already—there are so many options and platforms to consider that there will likely be one to fit the size, scope, and complexity of your event.
- Shorten development timelines—force yourself to meet the needs of the market faster than you have before.
- Consider new partners and collaborators.

No matter where you stand today, or how rough the past few months have been, all associations can continue to meet member needs in all new ways in the months ahead. Deliberate strategy, executing on that strategy, trying new products and services, and keeping your eyes on your customer base will help you keep your member education game strong.

1. Be deliberate.
2. Understand your audience.
3. “No margin, no mission.”
4. Sponsors.
5. Know your education program statistics cold.
6. Differentiate learning opportunities for members.

Debra A. Zabloudil, FACHE, is President and Founder of The Learning Studio, Inc. You can find her at 630-936-3068 and www.learningstudio.biz
It’s all about learning…online education is hot and in this era of non classroom programs, effective delivery of online programming is essential. This webinar by Thomas Mueller tells it all. Delivering online education via webinars (or similar online means) is ubiquitous…but not everyone knows how to do it right. Here is a basic guide.

7 CONSIDERATIONS FOR DELIVERING SUCCESSFUL ONLINE COURSES – APPALACHIAN STATE WEBINAR WITH THOMAS MUELLER – PANOPTO VIDEO PLATFORM FROM PANOPTO

Any organization delivering online education will benefit by the guidelines offered in this presentation, although it’s focused on classroom learning more than one-off programming. While viewing the article online will provide you the details, I’ll review the key points here and urge you to view the full presentation online.

1. Define your portal.
2. Use all online communication, e.g., email, forums, and submission tools.
3. Students must plan for connectivity, or their experience will fail.
4. Allow for mobile compatibility—not everyone works from a desktop.
5. Ensure that IT support is available—before you start.
6. Insist on academic integrity. Be proactive—set expectations for communication.

It’s a basic guideline—exactly what is needed to get started!

Watch the video at https://www.panopto.com/resource/?considerations-for-delivering-successful-online-courses/ or view the article and slides at https://www.panopto.com/blog/?considerations-for-delivering-successful-online-courses/
Association Laboratory Inc.

Association Laboratory is an award-winning company specializing in research, strategy, and strategic education for trade and professional association leaders. Since 1999, we have helped leading state, national and global associations design more successful business strategy.

Great Rates for 2021 Dates

Book a group for January – December, 2021 and receive the following:

- Flexible cancellation terms, food and beverage minimums and attrition
- Resort Fee discount of 50%
- 1 per 40 complimentary rooms
- 21 day reservation cut-off
- 1 suite upgrade at the group rate (with 40 rooms on peak)
- 50% discount on meeting room Wi-Fi
- 10% discount off banquet menus
- 20% discount off in-house AV

For more details contact the Sales Department at 970-923-8270 or email sales@westinsnowmass.com

Offer Expires 11/15/20

CONQUERING ZOOM MEETINGS
By Molly Sausaman

Months ago, when the COVID-19 pandemic forced us to completely immerse ourselves in video conferencing nearly overnight, many of us perceived this new reality as temporary.

You probably don’t expect to be discontinuing virtual meetings any time soon (or ever), and with this in mind, here are a few tips and reminders you might find helpful, even now after months of daily use of Zoom.

• YouTube contains step-by-step tutorials on just about every facet of Zoom functionality.

• Use Zoom security settings like meeting passwords and the lock meetings feature. The waiting room feature allows you to verify participants prior to admitting them to the meeting.

• Never use your personal meeting ID when hosting public meetings. Use a randomly generated meeting ID instead.

• Prepare a back-up plan in case of unforeseen technical issues. Practice putting it into action.

• Write yourself a checklist and keep it handy when launching Zoom meetings to be sure you don’t forget things like starting the recording and silencing desktop notifications. Include an at-a-glance reference to Zoom’s hot keys and keyboard shortcuts.

• Disable your camera and microphone by default when joining meetings. Enable the option to always see your video preview before it broadcasts to the group.

• Test your speaker and microphone at the launch of every meeting.

• Give a preamble at the beginning of every call that gives unmuting instructions and alerts participants about whether the call is being recorded. A reminder that “Chat to Everyone” actually means EVERYONE also comes in handy (it’s also recorded).

• The share screen feature gives you the option to share your entire desktop or just one of the windows you have open.

• Silencing desktop notifications can be done with Focus Assist on Windows 10. For Macs, you can use a third-party app like Muzzle.

• The gallery view layout shows everyone in the meeting on a single screen rather than just the actively speaking participant.

• When you are called on to speak, press and hold the spacebar to easily unmute yourself temporarily instead of scrambling to click the microphone button.

• If your computer does not have a strong processor, skip the virtual background option. The effect becomes distractingly blotchy and jumpy.

• Plan ahead to create engagement.

• Build in lots of breaks.

• Let attendees know they have time during breaks—ask them to stay engaged during the program.

• Use breakout rooms randomly or by topic—facilitate small-group engagement.

• Use breakout room monitors and scribes to condense ideas into bullet points that can be shared later—curate the content.

• Virtual scavenger hunts, virtual drawings (try wheelofnames.com), points for visiting sponsors—gamification.

• Ask thought provoking or silly questions; do something engaging or fun—try new things and have fun.
Let’s Build a Better Organization Together

Legal Advice & Representation
HR Expertise and Support
Compensation Strategy and HR Data
Training and Development
Compliance and Risk Management
Measure and Maximize Performance

COLORADO SPRINGS / DENVER / GRAND JUNCTION
LOVELAND / SALT LAKE CITY / SCOTTSDALE

Employers Council / Formerly MSEC
EmployersCouncil.org

Membership Management Made Simple

Free 30 Day Trial

wwwAssociationsOnline.com
ALLISON GAULT, CAE

At the time of this interview, Allison Gault was the Executive Director of Colorado Nursery & Greenhouse Association (CNGA). She has since become the Director of Member Engagement at the Medical Group Management Association.

By Becky Roland, CAE, Phoenix AHC

As a life-long learner, Allison Gault, CAE, finds CSAE membership an invaluable asset in her pursuit of new information. From the lunch and learn sessions and Annual Conference, to the articles that are included in the Executive Memo, she notes CSAE is a constant source of new learning opportunities. Allison has attended several events that have helped her to think differently, understand the other side of a challenge and get tools to brainstorm solutions to association issues she may be dealing with.

Allison appreciates being able to connect with other members in our association community. Each time she attends an event that includes a networking opportunity she finds someone who has dealt with a similar problem to one that she is grappling with. She enjoys sharing the great things that she and her staff are doing at her association so the ideas can be replicated and used.

The latest great project she has implemented is a marketing campaign titled, “You’ve Been Spotted.” Board members share names of companies that should be a member. She then calls that company, sends a membership invitation (including spots) and then has the Board Director follow up with a call. It has been very successful for her organization.

Allison began her association career in 2002, right after graduating from the University of Northern Colorado. She graduated with a BA in psychology and didn’t know what she wanted to do, so she started as an Education Assistant at Medical Group Management Association (MGMA). MGMA is a national association with over 40,000 members. During her 12-year career at MGMA, she earned a Masters in Business Administration from Regis University and worked her way up to Senior Manager of Member Engagement. She was responsible for over 600 volunteers, the state/national relationship and many special interest groups.

Managing 600 volunteers, Allison learned it is essential to define everyone’s role to minimize scope creep. This also helps to match expectations to the work being done. She says she should not be afraid to fire a volunteer before they derail a team. This was one of the hardest parts of her job.

In 2014, Allison took a position at the Colorado Nursery & Greenhouse Association (CNGA) as their Executive Director. The position provided her a great opportunity to learn all aspects of association management and provide strategic support to the Board of Directors. During her time, she increased membership retention to 90 percent and overall membership by 10 percent—a huge accomplishment in a downsizing industry. She also participated in advocacy at the state and federal level, which provided her the opportunity to learn new skills and gain an understanding of the importance of legislative activities for industries.

She earned the CAE credential in 2016. Allison is most proud of this accomplishment and the continued learning it encourages.

Allison recently accepted a new position as the Director of Member Engagement, back at the Medical Group Management Association. She is excited to be in this new role and looking forward to the challenges it brings.

Allison’s greatest professional accomplishment so far is passing significant legislation via the Colorado Legislature on sales tax being charged on fertilizer. The Colorado Department of Revenue audited a member company and was going to charge tax on fertilizer for their growing operation for the current and previous two years. This decision would have cost the company a significant amount of money as well as put members at risk for similar taxes. Through many meetings with members, legislators, lobbyists and testifying several times, the organization was able to pass a bill that exempts fertilizer from sales tax.

Her advice to anyone working on legislation is to not be afraid to call legislators and ask for what you need. Also, lobbyists can help with identifying the best supporters for a bill. Be sure to look for fixes first outside of legislation and exhaust all options, as this work may be faster.
CAE IS GETTING A NEW LOOK DECEMBER 2020

By Joan “JT” Tezak, CAE, CMP, Executive Director, Colorado Society of Association Executives

The Certified Association Executives credential (CAE) elevates professional standards, enhances individual performance, and designates those who demonstrate knowledge essential to the practice of association management. The CAE exam and certification are administered through the American Society of Association Executives (ASAE).

The CAE Commission periodically reviews the exam and makes adjustments to keep the CAE current in an evolving profession. In 2018–2019, the CAE Commission identified 119 essential association management competencies, which they organized into eight knowledge domains. These changes will be incorporated into the December 2020 exam and will continue through the May 2025 exam.

Beginning with the December 2020 exam outline, emphasis will be placed in the following test areas:

<table>
<thead>
<tr>
<th>Domain #1: Governance</th>
<th>% of exam</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questions on governance structure; chapters and affiliate relations; and volunteer leadership development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domain #2: Executive Leadership</td>
<td>19–21%</td>
<td>This section includes questions on decision making; ethical leadership; diversity, inclusion, and equity; adaptive leadership</td>
</tr>
<tr>
<td>Domain #3: Organizational Strategy</td>
<td>8–10%</td>
<td>General management; critical analysis and planning; and knowledge management</td>
</tr>
<tr>
<td>Domain #4: Operations</td>
<td>17–19%</td>
<td>Financial management; human resources; legal oversight and risk mitigation; infrastructure and technology; and vendor relations</td>
</tr>
<tr>
<td>Domain #5: Business Development</td>
<td>12–14%</td>
<td>Programs, products, services, and non-dues revenue; meetings and events; certification, licensure, and accreditation; industry standards; and strategic partnerships</td>
</tr>
<tr>
<td>Domain #6: Membership and Stakeholder Engagement and Management</td>
<td>10–12%</td>
<td>Recruitment and retention; stakeholder identification and cultivation; volunteer management; ethics</td>
</tr>
<tr>
<td>Domain #7: Advocacy</td>
<td>5–7%</td>
<td>Government relations; coalition building; and public policy</td>
</tr>
<tr>
<td>Domain #8: Marketing and Communications</td>
<td>12–14%</td>
<td>Marketing; brand management; communication; and public relations</td>
</tr>
</tbody>
</table>

This change in the content outline differs significantly from the Spring 2020 exam. A new study guide, produced by ASAE, will be available in early fall.

RECOMMENDED READING

The reading list for the December 2020 exam has not yet changed but it would be wise to check back from time to time to the ASAE website, CAE section for any updates.

The current list of readings include:
- How to Read Nonprofit Financial Statements, 3rd edition
- Membership Essentials: Recruitment, Retention, Roles, Responsibilities, and Resources, 2nd edition
- CAE Study Guide, which includes a practice exam

The CAE Exam Is a Computer-Based Test

The CAE exam is now administered as a computer-based test. Candidates are able to schedule their exam within a two-week window at any of the sites available through Scantron. Candidates will have four hours to complete the exam once they begin. Results will be mailed to candidates approximately six weeks after the final day of the testing window. Candidates will not receive results after they complete the exam at a testing center. After the test, the questions are analyzed statistically to identify if there are any hidden flaws. Questions that appear to be flawed are reviewed by the CAE Examination Committee to determine how that question should be scored. After these issues are resolved, the test is scored and results are finalized.

December 2020 Exam Dates

The exam will be held December 1–4, 2020, at Scantron locations. The application is September 25, 2020 for the December, exam. The application fee is $500 for ASAE Members and $750 for Non-Members.

Preparing for Your Success

Preparing for the CAE exam is critical for your success. CSAE has partnered with the Michigan Society of Association Executives (MSAE) to offer multiple options for virtual prep courses and materials at the member rate. (Make sure to indicate you’re a CAE member to get the discount). Other virtual options are also available. To obtain a full list of options contact the CSAE office at 303.650.0301 or jt@csae.org.

Augmenting this virtual study, CSAE will also be filling in the gaps by providing candidates in Colorado opportunities to connect with peers in person or online. Tips for test-taking and sessions that focus on the key components of the exam will be offered. Watch your email for full details this fall.

Make CAE Part of Your Fall 2020 Plan

There has never been a better time to pursue a CAE. Content is fresh and learning with peers is exciting. Professionalism drives self-confidence. Over 70 percent of CAE test takers report enhancing knowledge, improving advancement opportunities, and elevating their status in the current position. CSAE is here to help you make this goal your reality.
Soft skills—especially critical thinking, problem solving, managing people and creativity—are some of the most important skills for the workplace.

Source: Future of Jobs Report, 2020

94% of recruiters believe an employee with stronger soft skills has a better chance of being promoted to a leadership position than an employee with more years of experience but weaker soft skills.

Source: iCIMS Hiring Insights

2/3 of all jobs will be soft-skill intensive by 2030.

Source: Deloitte Access Economics

The average employee has time to dedicate just 1% of the workweek to professional development (24 minutes in a 40-hour workweek). This is where microlearning can shine.

67% of online learners access learning through a mobile device.

Countries with Highest eLearning Adoption Rates

<table>
<thead>
<tr>
<th>Country</th>
<th>Adoption Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>53%</td>
</tr>
<tr>
<td>China</td>
<td>52%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>41%</td>
</tr>
<tr>
<td>Romania</td>
<td>38%</td>
</tr>
<tr>
<td>Poland</td>
<td>28%</td>
</tr>
</tbody>
</table>

Trends to Watch in eLearning:

- Microlearning
- Artificial intelligence for translating programs into new languages—save on translation costs

Source: blog.commlabindia.com

How Consumers Prefer to Learn about a New Product/Service

<table>
<thead>
<tr>
<th>Format</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short video</td>
<td>68%</td>
</tr>
<tr>
<td>Test-based article or post</td>
<td>15%</td>
</tr>
<tr>
<td>Manual or e-book</td>
<td>4%</td>
</tr>
<tr>
<td>Infographic</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: financesonline.com/elearning-trends/
The feeling you get when you help others {Achieve More.}

To find out how your association can achieve more, visit us at naylor.com.

WE MISS YOU.

At CU South Denver, the health and safety of both our valued community and our employees are of the utmost importance.

When the time is right, our team is looking forward to welcoming you back to enjoy our expansive outdoor and indoor spaces.

For more information, visit southdenver.cu.edu/meetings.
When you picture Snowmass, you probably see a cozy mountain village tucked high in the Rocky Mountains surrounded by awe-inspiring views and adventure as far as the eye can see. And that’s true, but it’s also a premier meetings destination with 80,000 square feet of flexible meeting space at rock star venues like the Viceroy, Westin, and Limelight. Plus, it’s easily accessible by air or by land, which makes getting your attendees here a breeze. So take your next meeting or conference to the next level and book in Snowmass Village.

EXPLORE VENUES AT GOSNOWMASS.COM