EXECUTIVE EDGE

EXCELLENCE BY ASSOCIATION

CONNECTING AND ENGAGING VOLUNTEERS REMOTELY EVEN WHEN YOU DON’T HAVE TO

p. 12

Plus

10 Things I Learned About a Potential COVID-19 Exposure at a Recent Event p. 06

Model Liability Waiver for Association Event Attendees p. 10
The Qualified Association Specialist (QAS) Certificate Program gathers seasoned experts from around the country to present a comprehensive overview of the many facets of working in, or with, an association. This program is perfect for young (or new) professionals in the association industry who want to better understand the many facets of their organization.

ADVANCE YOUR CAREER in Association Management

The Comprehensive Overview of the Key Areas of Association Management includes:

- Organization Types & Management Structures
- Board Governance & Volunteer Management
- Financial Management & Budgeting
- Administration & HR
- Legal Issues in Associations & Risk Management
- Marketing, Communication & Crisis Management
- Social Media & Online Communities
- Membership Recruitment/Engagement/Retention
- Meetings, Conference, Trade Shows
- Non-Dues Development & Training Program
- Public Policy & Government Relations
- And More!

Our members get the member rate for this program with coupon code:

www.AssociationSpecialist.org
Colorado Society of Association Executives

About:
Who We Are, What We Offer, Leadership, CSAE News, Committees and Volunteers

Learn:
CSAE Events, Online Learning, Engagement Groups

Association Resources:
Articles, Publications, Books, Legislative Updates, Research and Reports

Career Center:
Job Postings, Certification Information

Join CSAE:
Membership Information

Don’t forget to check out csae.org for more resources, stories and inspiration.

The Mission:
CSAE is the community where association professionals within Colorado connect, learn, and support one another.

The Promise:
CSAE is committed to delivering high-value programs and services. If a CSAE member is not completely satisfied with any CSAE offering, CSAE will make it right or refund the member’s money.

CSAE is:
All about leadership
Committed to association excellence
Future-focused
Unique learning opportunities
An effective advocate

On the Web www.csae.org

FEATURING EDGE

6
10 Things I Learned About a Potential COVID-19 Exposure at a Recent Event

10
Model Liability Waiver for Association Event Attendees

12
Connecting and Engaging Volunteers Remotely—Even When You Don’t Have To

17
Making Your Office Remote-Meeting Friendly

The Mission:
CSAE is the community where association professionals within Colorado connect, learn, and support one another.

The Promise:
CSAE is committed to delivering high-value programs and services. If a CSAE member is not completely satisfied with any CSAE offering, CSAE will make it right or refund the member’s money.

CSAE is:
All about leadership
Committed to association excellence
Future-focused
Unique learning opportunities
An effective advocate

About:
Who We Are, What We Offer, Leadership, CSAE News, Committees and Volunteers

Learn:
CSAE Events, Online Learning, Engagement Groups

Association Resources:
Articles, Publications, Books, Legislative Updates, Research and Reports

Career Center:
Job Postings, Certification Information

Join CSAE:
Membership Information

Don’t forget to check out csae.org for more resources, stories and inspiration.

On the Web www.csae.org

FEATURING EDGE

6
10 Things I Learned About a Potential COVID-19 Exposure at a Recent Event

10
Model Liability Waiver for Association Event Attendees

12
Connecting and Engaging Volunteers Remotely—Even When You Don’t Have To

17
Making Your Office Remote-Meeting Friendly

www.csae.org | winter 2022 | 3
Colorado Springs has everything you need to create a memorable experience for your attendees. Here you’ll find room to inspire, innovate, connect and re-energize.

Learn more at VisitCOS.com/meet
**NEWS FROM THE PRESIDENT**

**NETWORKING—THE UNDERAPPRECIATED BENEFIT OF ASSOCIATIONS**

By Tyrone Adams, CAE, RCE – 2021/2022 President
Colorado Society of Association Executives

After a year and a half of virtual meetings, many of us have gone back to in-person or hybrid meetings. This year I have seen the joy and excitement of people getting back together, making connections, catching up with old friends and meeting new people. This made me think about the power of one of the most underappreciated benefits associations offer—networking opportunities.

“Networking is not about just connecting people. It’s about connecting people with people, people with ideas, and people with opportunities.” Michele Jennae

Doing this takes a lot of time, energy, and drive. Doesn’t it feel good to have a network to draw energy from and keep you going when challenges arise? By surrounding yourself with people who share a similar drive and ambition, you are more likely to move forward individually.

We help provide this tangible benefit for our members. In a normal year, we provide many opportunities for our association’s members to get together and network. If networking is critical to personal and business development for your members, then why don’t more people engage in it?

For many, face-to-face socializing, small talk, and networking are stressful activities. But they should be seen as being business opportunities rather than obstacles. There is so much for professionals to gain from networking when done properly and consistently. The return on investment (ROI) can be off the charts.

I love hearing stories from Colorado REALTORS® about business connections they made by attending association local and national events. One member met a REALTOR® from Hawaii at a National Association of REALTORS® (NAR) Conference. Little did they know that they would be helping each other soon. The Colorado REALTOR had a buyer moving to Hawaii and was able to refer the client to the Hawaiian REALTOR. It was the most profitable transaction they have ever made off a referral. That’s a pretty good ROI, and it all started from networking at an NAR event.

The same can be said about the CSAE Lunch and Learns and board meetings. The energy is felt, and the meetings and events have truly connected people in meaningful ways that virtual meetings cannot.

But that’s only the beginning. Here are some of the most powerful benefits of networking according to many authors who have written about it.

1. Generates referrals and increases business
2. Creates new opportunities
3. Your network becomes a resource
4. Connect with influential people
5. Raises your business profile
6. Helps build your brand
7. Business networking increases confidence
8. Allows you to test the water with new ideas and thoughts
9. Gives satisfaction through helping others

According to Hubspot, 25 percent of businesspeople don’t do any networking. If that’s true, then just by doing a little networking, you help association members put themselves ahead of 25 percent of others doing business in Colorado.

COVID-19 has not gone away, which is why it is important that you hold in-person networking opportunities safely and responsibly. Also, make sure the member experience is excellent when you do bring them together. Your members will thank you for it. I know ours do.

Thank you for being a member of CSAE!

**Benefits of Networking Additional Reading:**

- The Importance of Networking (and How to Do It Well) — Amanda Augustine
- The Power of Networking and Relationships for your Business — Workshop.com
- Study Shows the Power of Networking in Alleviating Hardship During COVID-19 — Malena Tulip and Ghuwa Ismail
- 8 Secrets from Power Networking Pros — Molly Triffin

www.csaee.org | winter 2022 | 5
10 THINGS I LEARNED ABOUT A POTENTIAL COVID-19 EXPOSURE AT A RECENT EVENT

Originally posted in the ASAE Collaborate Writers Resource Pool Forum, September 24, 2021

By Patrick Algyer
I am a staff of one with about 400 members. Last week we held our 33rd Annual Golf Classic and for the first time ever, added a non-golfer wine event at a winery about 15 minutes from the golf course. I’m writing this to share my experience in hopes that it will help someone else. To be honest, I always think about the worst-case scenario, however, never thought this could happen at one of my events, and it did.

Backstory: Planning commenced in January 2021; we were looking forward to another successful Golf Classic and of course the new non-golfer wine event. We were thrilled with the pace of registrations and sponsorship purchases and our members were over the top excited! We ordered new signage for this event, a step-and-repeat was donated by one of our printing members and all signs pointed to business as usual. We had 88 golfers, 30 sponsors, 19 non-golfer wine event attendees, and an incredibly happy board of directors.

The day of the event, as most events are, was a bit chaotic in the morning with registration, answering questions, and even securing two last-minute foursomes! Nine a.m. rolled around and the golfers were off to their holes for a day of networking, fun, making new friends and seeing folks they haven’t seen in a long time.

I managed to sneak away from the golf course for about 45 minutes to head to the winery to mingle with members and see how they were enjoying their day. The weather was a bit humid, but everyone was having a great time wine tasting, having lunch, and playing cornhole.

I raced back to the golf course to start setting up for the awards ceremony and dinner. To my surprise, golfers were already coming off the course about 45 minutes earlier than last year. Not a big deal, we just rolled with it. By 2:30 we began the awards ceremony, everyone was enjoying late lunch/dinner and having a great time! We pulled the raffle prize winners, announced the last place and first through third place, longest drive and closest to the pin winners, and finally awarded the silent auction items appropriately.

I could not have paid for a more smoothly run event! We ended the awards program, and everyone started leaving. I packed everything up, said goodbyes to the staff at the golf course, who also helped set up, tear down and load my Jeep. Exhausted, but thrilled with how both events went off without a hitch, I was jamming out in the car on the 45-minute drive home, which turned into an hour and 15 with traffic. I didn’t care, it was a great day!

The next day, I arrived at work with excitement and thinking about how successful everything went. I started unpacking event supplies and putting them away until next year. I caught up on emails, received many notes and phone calls from members, especially sponsors, who were bragging about the number of leads they obtained and wanted me to know they achieved their ROI goals.

Then it happened: Around 3:45 p.m. that day I received an email from one of our sponsors’ Vice Presidents. The subject line was Yesterday’s Tournament, so I thought, great, another kudos email! I started reading and they were writing to me to let me know one of their employees, who was not vaccinated and attended the golf outing just tested positive for COVID-19 earlier that day. My jaw dropped and the high I was riding for the last 24 hours ceased to exist. A thousand thoughts raced through my mind—here are several (expletives removed):

• I’m vaccinated, so I should be OK.
• That person wasn’t vaccinated, so AM I OK?
• How many other people at the event were not vaccinated?
• How many staff members at the golf course could be affected?
• What kind of financial ramifications could affect the association?
• Can I be held liable personally?
• Can the board members be held liable?
• Should I call the Virginia Department of Health or Arlington County where our office is, or do I call Fairfax County where the golf course resides?
• Do I make calls before telling the board or get all the info and then tell the board?
• Who is the best reliable source for me to call?

Thankfully, earlier this year we engaged with a PR firm, OnWrd&UpWrd, and I immediately forwarded the email to them and asked for assistance with how to deal with this "crisis." They immediately replied with text for an email to go out to the event attendees. Meanwhile, I chose to call the Virginia Department of Health (VDH) as well as Arlington County. I left messages for both. I then called and left messages for the golf course, winery, and hotel where we held a reception the night before and many of the attendees stayed. I called the President of the Association and informed him of the situation. I advised that the PR Team is crafting a message and I’ll send it to the executive committee for review before sending it to the event attendees.

“Plan for the steps you are going to take if you are alerted of a potential exposure so you can act quickly.”
Once home, I told my husband what happened, and he pretty much went through the same questions I had above. The phone rings and it’s the Virginia Department of Health. On the other end of the line was a very calm and patient voice. She asked me a series of questions about me, the event, the attendees, the unvaccinated individual, etc. She gave me a list of tips to share with the attendees, which you’ll find in the sidebar. (This should in no way supplement your own call with your local or state health department.) I took copious notes during the call and then sat down to send it to the PR Firm. They rewrote the communication to include the information from VDH.

I composed the email to the attendees and sent the draft communication to the executive committee. It was interesting to see how they were split between wanting to include the individual’s name, keeping it confidential, and an array of other responses. This transitioned into a text message conversation about how to proceed. Meanwhile, I’m also texting with the PR firm and keeping them in the loop on the additional questions and scenarios I’m receiving from board members.

About five hours after I was alerted there was a potential COVID-19 exposure, I received approval from the executive committee to send out the communication without including the individual’s name, company, or ANY other identifying information. Bracing for impact, I hit send on the email and sat and watched as the number of emails opened increased from 0 to 4 to 10, to 19, to 21, to 46, and finally, in a 15-minute period, the opens tapered off.

I received one email immediately from a member thanking me for sending out the notification knowing that it could have a negative impact on the association but ensuring me this was the right move. Two more emails came in asking for clarification for specific scenarios. It was a late night and an early morning.

The next day, my husband and I were off to North Carolina for a quick weekend getaway. Of course, I thought about canceling the trip, but I can respond to emails and phone calls while on the road. Two more phone calls came in Friday morning from members with compliments and questions. That was it! I braced for the worst, just to be met with compliments and a few easy questions.

Over the weekend, I received a few text messages from board members asking what kind of responses I was receiving, I replied, and they were pleased.

What did I learn?
1. No matter how well you plan, you, too, can have a potential COVID-19 exposure.
2. Plan for the steps you are going to take if you are alerted of a potential exposure so you can act quickly.
3. Prior to the event, communicate ways attendees can remain safe onsite—wear a mask, wash hands, social distance, etc.
4. Do not be afraid to communicate to the venue, contractors and attendees of the event and be honest and factual in the communication.
5. Inform your board of the plan if something happens, so it can be executed quickly.
6. Call your state or local health department for guidance and support.
7. Consider the reputational risk associated with outing the person and/or keeping the information quiet.
8. Focus on encouraging attendees to monitor their health and get tested if they need assurances.
10. Ensure your message is as timely as possible.

Tips from the Virginia Department of Health

Vaccinated Individuals with no symptoms nor immunocompromised
• If you are vaccinated with no symptoms nor immunocompromised, there is no need to quarantine; however, you are highly encouraged to obtain a COVID-19 test 3–5 days after the exposure.

Unvaccinated Individuals
• If you are unvaccinated, you should quarantine immediately for 14 consecutive days and call your doctor regarding obtaining a COVID-19 test.

Diagnosed with COVID-19 in the last three months
• If you have had COVID-19 in the last three months, you should obtain a COVID-19 test 3–5 days after the exposure.

Patrick Algyer is the Executive Director of the Northern Virginia Apartment Association. He is also the Chief Strategist and Founder of Encore Engagement Solutions. He has been both a member and staff member at various associations and nonprofits throughout his career.
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

www.csaes.org | winter 2022 | 9
Should our association require all attendees to agree to a liability release and waiver as a condition of attendance, assuming the risk of attendance and agreeing not to hold our association liable if the attendee contracts the novel coronavirus at the event?

If an association believes it can get most of its prospective attendees to agree to such a waiver, it cannot hurt the association from a legal risk management perspective, and may well help it, to require such waivers. That being said, waivers are regularly challenged and nullified by courts for a variety of reasons; as such, they can virtually never be viewed as a complete liability shield and should never be relied on as such. Most courts, for example, will not enforce a waiver if it finds that the plaintiff was harmed by gross negligence.

If the association does use attendee waivers, consider adding a provision to the form whereby attendees affirmatively agree to engage in certain health-and-safety-beneficial conduct while attending the event (e.g., wearing a mask at all times in public areas, engaging in appropriate social distancing, not venturing off-site to risky environments (e.g., crowded bars), and not attending the event if the attendee is ill or has had recent exposure to a COVID-19 case). It goes without saying, but waivers are no substitute for the association—and the event venues—undertaking the necessary health and safety measures.


Below is a model attendee liability waiver for consideration by associations in connection with future in-person association events:

**Model Attendee Liability Waiver and Assumption of Risk**

Attendee assumes all risks and accepts sole responsibility for any injury (including, but not limited to, personal injury, disability, and death), illness, damage, loss, claim, liability, or expense, of any kind, that attendee may experience or incur in connection with attending the EVENT. Attendee hereby releases, covenants not to sue, discharges, and holds harmless ASSOCIATION, its employees, agents, and representatives, of and from any such claims, including all liabilities, claims, actions, damages, costs, or expenses of any kind arising out of or relating thereto.

“It goes without saying, but waivers are no substitute for the association—and the event venues—undertaking the necessary health and safety measures.”
Jeffrey S. Tenenbaum, Esq. is Managing Partner of Tenenbaum Law Group, PLLC, and one of the nation’s leading nonprofit attorneys, frequent author, lecturer, media commentator, and expert witness on nonprofit legal matters. He is the recipient of numerous distinguished national awards and honors. Contact him at jtenenbaum@TenenbaumLegal.com or 202.221.8002.

Learn More

Visit https://www.tenenbaumlegal.com/publications/ for more articles and presentations, including:
- Navigating Vaccine Mandates in the Association Workplace
- Beyond Force Majeure: Navigating Hotel and Venue Contracts in a (Post?)-COVID World
- UBIT and Virtual Trade Shows: What Associations Need to Know
- Top 10 Legal COVID-19 Q&As: Evolving Issues for Association Events
- Five Legal Questions About Resuming In-Person Events as COVID-19 Continues

Or visit https://www.tenenbaumlegal.com/event-tags/recordings/ for programs like these:
- The Legalities of In-Person Events: What Every CAMFT Board Member and Committee Chair Needs to Know
- Current State of COVID-Related Workplace and Meeting Legal Issues for Nonprofits
- Post-COVID Return to the Workplace: HR and Office Considerations for Associations
CONNECTING AND ENGAGING VOLUNTEERS REMOTELY EVEN WHEN YOU DON’T HAVE TO

By Jeff Arnold, MAM, CAE
Pre-pandemic, most associations were already engaging virtually to a certain degree, whether by teleconference leadership meetings or online education. Overall, the difference in 2020 was simply the scale at which the virtual environment had to be deployed. Instead of select meetings being held virtually, all meetings were. As a result, what many members view as the fundamental value of associations—i.e., associating—was challenged.

Many national and international association boards and committees had been meeting virtually—some by Zoom or other videoconferencing platforms—long before 2020. For state and local associations, however, the norm is for boards and committees to meet almost exclusively face-to-face as often as monthly. The shift to a fully virtual engagement was more of a shock to the system in organizations whose primary value proposition was regular face-to-face networking and building local community relationships.
The questions now are:

► As we shift from virtual engagement as a requirement to virtual engagement as an option, how do we strike the proper balance of in-person and virtual engagement opportunities?

► What is lost if the shift goes too far to virtual and members begin to feel disconnected and see less tangible value in membership?

► If we swing back to primarily in-person, do we risk losing engagement from members who can’t participate in face-to-face meetings due to distance, time, and/or financial limitations?

Engaging Remote Constituencies

One effect of being forced into a fully virtual environment is that we began to see (and enjoy) the benefit of not commuting and having to block out travel time to and from a meeting on our schedules, not to mention having to shower and dress up. Let’s face it, cross-bedroom commute, pants-optional meetings have their advantages. So, very likely, a lower frequency of in-person meetings even in local level organizations may be a permanent shift.

A surprising outcome of going virtual is that in many cases, association membership engagement has been enhanced. Not all members can afford to travel to conferences or board and committee meetings—a challenge not limited to national and international organizations. Colorado is a big state and most statewide associations on the Front Range have trouble engaging members from far-flung areas in the mountains, plains, and the Western Slope.

This presents an opportunity to provide virtual programming of specific interest to remote communities. A common member complaint in statewide associations is that meetings, programs, and services are heavily weighted toward the Denver Metro Area, which is a direct result of an exclusively in-person paradigm. The members who have the shortest distance to travel are the ones who show up, whose voices are heard, and whose needs are met.

Adding virtual and hybrid options along with in-person meetings creates opportunities for members in the hinterlands to engage when they might not otherwise have been able to. Virtual programs can help bridge the gap in serving members in areas the association cannot reasonably serve in-person. Further, those who may be nearby but can’t afford in-person programs are no longer marginalized.

► Is your association offering programming of specific interest to these outlying constituencies?

► Are you using virtual meetings to engage outlying constituencies in your advocacy efforts?

► How else can you provide targeted benefits to underserved constituents using virtual meetings?

Virtual Engagement Best Practices

The biggest challenge of virtual meetings is the ability of participants to disengage while “attending.” There has been some improvement with the addition of video, but if participants want to check email, turn the video off and go walk the dog, sometimes they’ll do just that. So here are some tips to minimize checking-out.

Avoid reporting out – Frankly, reporting out is a bad idea even for in-person meeting engagement, but it’s a much graver sin in the virtual environment. Participants will immediately start checking email or surfing the internet if the meeting is nothing more than redundant reports from staff and volunteer leaders. Meetings are for dialog, not monolog.
Hold round-robin discussions – Provide balance and voice by asking a question or having a discussion item where everyone in the group is required to respond, at least once in the meeting. Otherwise, only the dominant voices are likely to speak up while most of the group remains passive.

Call on quiet participants – Occasionally call on a non-engaging participant directly and ask, “What do you think about this?”

Pay attention to the chat area – Sometimes quiet participants choose to type in the chat area rather than unmute to speak, and their chat messages may go unnoticed. It helps to assign someone other than the presenter to pay attention to the chats and bring them to the group’s attention. If your group over-uses chat instead of speaking, bring this to everyone’s attention and balance the means of communication.

Break out – Using the breakout groups function in virtual platforms is a great way to increase engagement. People have more in-depth, open conversations in small groups of two to five people than in large groups. Using small group discussion is particularly effective for “divide and conquer” of complex, multipart discussions. Each breakout group can examine one topic in-depth, one aspect of an issue, or one goal of a plan. Thus, the larger group can cover more ground in less time.

Poll – Use the polling function to understand where the group stands on key considerations, such as a legislative issue or a controversial decision. Like round-robin polling, polling is a way of engaging the entire group to provide input.

Use time wisely – People often book virtual meetings back-to-back and will leave at the scheduled end time regardless of whether you accomplished what you wanted to during the meeting. It’s better to under-schedule than over-schedule meeting discussions. No one complains about a meeting ending early. It is OK to get off the 15-minute interval convention. Consider scheduling the meeting to start at :05 or to end at :55.

Have a contingency plan – If you’re concerned about adequate time, have a contingency plan in place before the meeting on how you will follow up or follow through if discussions don’t conclude before the meeting ends. Make the plan known during introductions to prevent tension from building as time is running out. Frontload important discussions and put less important items toward the end.

Getting Stuff Done in the Virtual Environment
Follow-up and follow-through are vital. Volunteer management challenges both in-person and virtually, but the true challenge with remote volunteers is “out of sight, out of mind”—where nothing gets done between meetings.

Board and committee work can be more productive in person when you can read body language, build rapport, talk over lunch, or get together one-on-one during breaks. The “meetings outside the meeting” lengthen the discussion and problem-solving opportunities—an area in which virtual meetings fall short.

Tips for Productive Virtual Volunteering
• Make clear and specific assignments between meetings: Assign individuals specific tasks, along with context and guidance and clear timeframes.
• Use workgroups: It’s much easier for groups of 2-3 people to find time to meet and talk between meetings than for a larger group. Also, workgroups are often better than individuals at maintaining self-accountability.
• Touch base: Virtual volunteer management may require hands-on engagement by the committee chair or staff liaison to ensure things are moving along. Simply touch base on assignments mid-term to see “how’s it coming along?” Try to keep communications more in the vein of a reminder or gentle nudge than micromanagement. Everyone has a day job, and sometimes time slips by, or an assignment gets lost in the shuffle.
• Be flexible: The advantage of virtual volunteering is that it can be self-paced. Volunteers can do the work when they have the time. Virtual meetings don’t require extra commute time and expense, so rescheduling is relatively easy if it will be a more productive meeting later.

Even if your committees meet in-person, meeting between meetings in virtual workgroups can help improve productivity. While associations are slowly finding their new association-specific way of operating, there are great advantages to keeping the best of the old and new in place.

“Sometimes quiet participants choose to type in the chat area rather than unmute to speak, and their chat messages may go unnoticed”
YOUR COLLEAGUES NEED YOU—
LIVE AND IN-PERSON AT CSAE EVENTS

By Rob Spangler, MPA, CSC

We can learn a lot from Tyrone Adams’ article on Networking the Underappreciated Benefit of Associations. The CSAE Programs Committee wants to add a key point—Your colleagues need you.

A secret of adult education, and which in-person education/networking events excel, is that adults learn best in groups, engaging in personalized discussion and by engaging common purpose. “What we give” is a gift to our colleagues and is the less discussed side of professional association networking.

I don’t know about you, but I didn’t join CSAE to be by myself. I joined to be a friend, to share my perspective and to elevate our truly esteemed profession—association management.

Selfishly—I need you at CSAE events.
▶ Who will receive and return my smile, if not you?
▶ Who will give me a fresh perspective to an emotionally challenging issue, if not you?
▶ Who will share “elbow time” with me in the hall, if not you?

We learn by processing thoughts.
▶ Who can I bounce thoughts about the speaker’s content off of, if not you?
▶ Who will share your years of experience to apply to my situation, if not you?

Associations are designed to have people associate. Each of us, you and me, should walk the walk. Our deepest hope is that our members will participate at the highest level possible, even when it is a bit inconvenient, so it makes sense for us to support our profession and our professional association by showing up and walking the walk.

I look forward to shaking your hand, returning your smile, and hearing your inspirations and challenges at a CSAE event soon.
As many associations look to host video-enabled meetings with more sophistication, two associations share insights into conference room technology upgrades.

**Colorado Association of REALTORS**
- **Project:** 20’ X 40’ Conference Room
- **Equipment Purchased:** Control tablet, camera mounted on the wall, 80” TV screen, Wireless Projection Device, and Zoom Platform
- **Equipment and Installation Cost:** $50K

“When evaluating options, I looked at the ease of use for the staff and how we could make it simple to connect to a virtual call. Our conference room can hold up to 24 people and we can conduct meetings hosting up to 1,000 participants via Zoom.”

*D. Jonathan Griggs*, Vice President of Internal Operations
For more information: jgriggs@coloradorealtors.com

**Society of Mining, Metallurgy & Exploration**
- **Project:** 15’ X 30’ Conference Room
- **Equipment Purchased:** Two 75”, 4K commercial grade TVs, four ceiling-mounted speakers and microphones, HD camera, table-top touch screen to control all of the equipment
- **Equipment and Installation Cost:** $45K

“We have had problems with outdated technology in the past, and we wanted this equipment to be extremely easy to use. We now have the ability for individuals to bring their own device and easily plug into the equipment to run a meeting using MS-TEAMS, Zoom, Webex, etc. From the conference room, we have the ability to see remote attendees on one large display while sharing and collaborating on a second large screen. The in-room camera will allow us “face-to-face” interactions with those that are participating remotely. With the microphones and speakers, we are able to have everyone in the room communicate without limitations on where they are seated in the room. We plan to outfit a larger conference room in our building in the future, but wanted to test equipment in a smaller room first.”

*Paul Hoiberg*, CAE, Information Systems Manager
For more information: hoiberg@smenet.org
Joan Tezak, CAE, CMP, affectionately known as JT, retired as CSAE Executive Director at the end of 2021, after 24 years of leading the Colorado Society of Association Executives. During her time CSAE has evolved into a trend setting organization in the Society Association Executive (SAE) world.

To ensure a smooth transition, CSAE’s Board of Directors selected Julie Massaro, CAE, to serve as Interim Executive Director until a new Executive Director for CSAE is hired. This will afford the Board the opportunity to make sure they hire the best possible selection to lead CSAE into the future. Also, during this process, the Board of Directors will develop a six-month action plan for CSAE. We wish JT the very best, on behalf of the CSAE Executive Edge Committee and CSAE members.

FROM LESLIE
JT’s friendship, encouragement and advice made a huge difference in my career—and my life—and I know I’m only one of many members who could say that. She showed me a clearer path to serving as an executive director of a small association and her advice helped me navigate some of the thorniest obstacles. She encouraged me to join the editorial committee, and instilled confidence that I really did have something worthwhile to give back to the magazine and to CSAE.

Her freely offered advice and wisdom have helped carry me through the most difficult periods of my career, and she has celebrated with me the most uplifting moments of my career.

She has been unfailingly kind while always gently guiding us to bring out the best outcomes from our ideas and abandon the unworkable.

FROM BECKY
I often joked with JT that being the Executive Director of an association of executive directors and staffs of nonprofits is a unique form of madness. She did it so well. CSAE has continually changed and brought fresh ideas and timely benefits to us all, and I have borrowed many ideas for my organizations from CSAE and JT.

I have met so many volunteers for CSAE, and often the question of, “How did you get involved in CSAE?” is answered the same way—“I got a call from JT.” That is the start to my story with CSAE. It is the one thing I appreciate most and the one big lesson I have learned from her. She excels at recruiting volunteers, but in a way that allows the volunteer to make an impact. I have learned that:

• You must continually, and personally, ask people to volunteer. If they say no, don’t be afraid to wait and ask again when a need arises.
• Match the skill sets of the volunteer to the job.
• Provide strong guidance on what the goal is, what the deadlines are, and what the consequences are for not meeting deadlines.
• Step out of the way and allow the team to work. Provide insight when needed on the direction of the team.
• Be available for consultation and assistance, but let the volunteers do the job.

I am grateful for the example JT has set for me. I will miss seeing her at meetings and hearing her cheers from the sidelines.

Enjoy your retirement, young lady. You have earned it!

Becky Roland, CAE and Leslie Shivers, CAE, are co-chairs of the Executive Edge editorial committee.
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.
TECH TIP

APPS FOR SAFE MEETINGS

By Katie Koch, Section Relationship Manager, American Water Works Association

Associations have experienced several evolutions in event delivery since March 2020. As we enter a third year of the pandemic, many associations are using technology to make the transition to in-person events a safer option.

Some organizations are electing to require negative test results or proof of vaccination for all event attendees. If you are considering such a requirement, there are several apps and platforms that provide solutions for vaccine/ negative test verification and contact tracing.

What to Look for in an App

It can be hard to differentiate between each service. Questions that your organization should ask include:

- What personal information is requested by the app? Where is that information stored?
- Is the app HIPAA compliant? What privacy assurances does the app provide?
- Who beyond the attendee has access to the attendee’s health information? Does the app rely on your staff to verify information uploaded or does the company behind the app provide verification services beyond simply facilitating the submission of information?
- How will verification be presented on-site? Does the app provide a QR code or some kind of color-coded system to validate that an attendee has gone through the verification process?
- Does the app offer contract tracing capabilities? If so, what kind of inputs does the app need to successfully identify close-proximity exposures? Does the app integrate with your messaging system or does it send messages independently?
- Does the app integrate with the event registration system? Can messaging from the app be branded with your organization’s logo and information?

- Does the app allow your organization to upload waivers or policies for review/signing?
- Does the app have any pre-screening features? (For example, are attendees verifying, prior to checking in, whether they’ve been exposed to anyone who has tested positive?)
- What type of reporting dashboards does the app provide event organizers?
- Does the company hosting the app provide on-site services as well?
- What kind of investment does the app involve from a staff time perspective?

Features Worth Exploring

During a panel discussion held by the Reston Herndon Meeting Planners (an association of meeting planners in the DC-area), several companies provided insights into their services. While the app representatives didn’t disclose pricing (it’s not hard to imagine a steep price tag), several of the app features discussed were innovative and would make for a great addition to meetings. For example, Volan Technology presented their contact tracing app that uses a Bluetooth-type technology to identify attendees at higher risk after a COVID exposure. SafeAccess shared its verification system that includes color-coded badges for easy check-in during conferences. Fern demonstrated its detailed dashboard system that helps event organizers quickly understand which attendees have gone through the verification process.

The recorded webinar is available at youtube.com/watch?v=TxkN2W8YH1mg.

Using the myColorado™ app

For organizations looking at more cost-effective tech solutions for local events, you may look at the state’s myColorado™ app. The program allows users to upload their vaccine information along with their state ID. The information is then checked against records in the Colorado Immunization Information System. Once verified, a digital copy of the CDC vaccination card is available in the app.

The app also integrates with the SMART® Health Cards system, which presents a QR code that can be scanned by organizations requesting proof of vaccination or a negative test result. The SMART Health app is an open-source platform that was developed with federal support. Any organization can use the coding available at Docs.SmartHealthIT.org.

Keeping Verification Accessible

In a November 15, 2021, interview with National Public Radio, Mary Beth Kurilo, Senior Director of Health Informatics for the American Immunization Registry Association, noted, “We’re still at a point where we need to be open and flexible about what we accept as proof of vaccination…I think that does tie in with equity and access—fair access. We just need to make sure every consumer can get what they need and that we’re not cutting off services because someone doesn’t have a mobile device or because they choose not to enter their information into an app.”

Consider alternative ways your association can work with attendees to verify vaccine status or COVID test status.

Limits of Technology

As always, technology solutions for safe meetings are only as effective as the planning and work built around them. Having well thought-out operational and communication plans is critical when it comes to safe meetings. These apps can be helpful tools in carrying out those plans, but they are not the answer themselves. It should also be noted that these apps rely on attendees to self-report. The process may save time but it’s certainly not automatic.
Like most of you who travel, I spent a lot of time in airport lounges waiting for flights and always perused the collection of magazines on their bookshelves. About three years ago I found one that intrigued me. It is titled IQ Insignium Quarterly… for Executives, by Executives and subtitled, “Transforming the practice of management and leadership.” And I thought, “Isn’t that what we in association management are all about?” So I took a copy home, read the articles and subsequently asked to be on their mailing list. By the way, the subscription is complementary. You can learn more about them (and I urge you to explore further) at www.Insignium.com.

This is my last article for the Executive Edge and I think the topic is most appropriate. The article is titled: The Insignium Post-Pandemic Survey 2021. The focus is on how employees/staff perceive themselves, their lives and their work environments. The survey asked three questions:

1. In what ways have you changed during the pandemic (perspectives on life, work and personal values)?
2. In what ways have you changed your expectations of the people leading your organization?
3. How will your organization need to change to adapt to the post-pandemic you?

The results yielded 5 critical shifts and 5 implications:

**SHIFTs**

1. **“I will never let work displace my life again.”**
   Before the pandemic most employees’ (exec or not) work would displace family life … you guys go ahead with the birthday party or dinner … I’ll be a little late.

2. **“I used to have two selves—work and home. Now I just have my one whole self.”**
   There used to be the family at home and the staff at work. Zoom allowed the kids and pets to be part of all calls. Board meetings were attended via the laundry room, den or any available space. Children and family matter—work/life balance is a priority.

3. **“I can no longer assume that tomorrow will be the same as today.”**
   School cancelled and basic needs at grocery stores challenged. Standing committee meetings went away. Communication methods totally revised. Realization that anything can change!

4. **“I found leadership in myself.”**
   People found more time to check in on others and leaders gained an awareness of their staff’s lives they did not earlier know or appreciate.

5. **The way the virus spread showed how we are all connected.**
   Every individual action has impact upon others.

**IMPLICATIONS and challenges to management**

1. People no longer feel they have to put up with inflexible work environments. This concept opened a number of options: work from home, staff does not need to live/drive to an office nearby, changes in days, time and specific hours worked.

2. People want managers, leaders and organizations that care about them. This concept will be seen especially in the hiring process wherein potential employees will evaluate how much their employees care.

3. Uncertainty about the future—anything can change. There is still an underlying anxiety that “something will happen.” This certainly opens the door to creative solutions.

4. “Faraway” events are not that far away. Whether it be international or local—it is all in our back yard. How can a company and employees respond?

5. “Being real”: People want leaders who tell the truth. Authenticity matters.

Copyright © Insigniam Holding LLC. All rights reserved. Confidential and Proprietary. May not be reproduced in any form, by electronic or print or any other means, without the express written permission of Insigniam. Visit www.insigniam.com for contacts.
GOOD REASONS TO GET BACK TO MEETINGS

Vaccination Rate—Participants (attendees, exhibitors, staff) have a vaccination rate 80% or greater, imparting a coverage ratio that drastically cuts transmissibility of COVID-19 at [in-person business] events.

80%

Respondents felt that the reason to get attendees and exhibitors to events is simply to host your event. This is above CDC guidance, vaccination rates, and health and safety protocols.

87% of meeting attendees consider events irreplaceable.

90% of participants are not opposed to additional health and safety protocols that will enable them to gather safely.

Because of their controlled nature (e.g., registration required, private spaces, set times), in-person business events are self-contained bubbles, separate from the surrounding city, meaning the in-person event has little to no impact on community spread and vice versa.

Source: Freeman & Epistemix Delta Impact Study, August 2021
CSAE Podcast Features the Best Minds in Associations

CSAE's podcast, “Best Minds in Associations,” offers a new topic twice a month. On the first episode each month, the podcast addresses thought-provoking ways that you can make a difference in your association, company, and life. And on the second podcast of the month, we feature an influencer in the association community who you need to know.

Learn more at csae.podbean.com!

Monarch Casino Resort Spa

Where meticulous meeting planners are dedicated to flawless execution. Combined with impeccable dining; an all-new luxury spa; and exhilarating, no-limits casino action, we invite you to see how Monarch Casino Resort Spa will bring new energy to your next meeting or event.

720-406-3840 | monarchblackhawk.com/meetings

It’s the new CSAE online community and it’s just for you.

Share resources, videos, articles, best practices and much more.

Post a question, find an answer, start a discussion.

Or simply network with your CSAE colleagues.

Join now at https://connect.csae.org

CSAE connect

Unique
Inspiring
Memorable

Escape into the breathtaking beauty of Colorado’s Rocky Mountains.

Where meticulous meeting planners are dedicated to flawless execution. Combined with impeccable dining; an all-new luxury spa; and exhilarating, no-limits casino action, we invite you to see how Monarch Casino Resort Spa will bring new energy to your next meeting or event.

720-406-3840 | monarchblackhawk.com/meetings
Offering 285 guest rooms, access to multi-million dollar residences and more than 40,000 square feet of function space. With a long list of activities immediately outside our back-door including ski in/ski out access to Vail Mountain and a scenic path along Gore Creek to Vail Village, Grand Hyatt Vail is the inspiration behind memorable meetings and events.

For more Information
970.479.1032 | egegh-rfp@hyatt.com