

LEADERSHIP ACUMEN

Volume 2 • Issue 1 • Spring 2016



association
acumenTM
guiding organizational evolution



ASSOCIATION ACUMEN: 10 YEARS STRONG And What A Fabulous Decade It's Been!

In the last decade, we established 10 association headquarters (plus our own!) providing talented staff, filling programmatic gaps, revamping financial structures and launching robust websites. We also consulted with dozens of associations on organizational lifecycle management and strategic planning, executed hundreds of complicated meetings and launched sophisticated membership programs with complex databases and integrated marketing channels.



We could only accomplish this through strong collaborations with many different boards and by syncing with board leaders. Board partnerships inspire, challenge and reward us every day. We know we are fortunate to work with the individuals that somehow carve time out to lead associations, propel new initiatives and snuff out status quo. They are busy, important, accomplished people that share their passion, commitment and finesse and allow us to be a part of their wisdom in action.

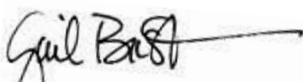
We complement robust leadership with our deep association management expertise and a client roster that crosses multiple industries. In ten years, our ongoing evolution has allowed and encouraged us to focus on:

- Managerial transparency – To allow boards to lead efficiently, we regularly provide reports, at-a-glance statistics and key performance indicators.
- Knowledge transfer – We developed (and continually tweak!) onboarding procedures, orientations, service and contract reviews to efficiently orient both board leaders and staff to essential association management know-how and industry knowledge.
- Organizational viability – We are astutely hands-on in understanding the educational needs and the technological tools that enable the continuous innovation of meaningful programs.
- Talent management – We take pride in attracting and retaining the best people in the field. We work hard, have fun and give people time to refresh and renew.
- Financial stewardship – We guard the organization's financial health like it is our own. We proactively generate revenue and balance budgets to advance our organizations.

Our talented teams partner with boards to both lead and serve. That's why our 10-year record demonstrates that our client associations survive, thrive and grow. Our client associations increase revenue by an average of 30% in the first two years with Acumen. They launch new programs. They employ technologies that are easy for members to access. They connect people. They are the place to be.

We believe association management is more than the boots on the ground. So we put ourselves in our client association's shoes. We adopt their mission. We focus on outcomes, not management. We align our goals with our clients' strategic plans. The associations we manage benefit from our unwavering high standards and our expertise, energy and enthusiasm.

In ten years we have come a long way in guiding organizational evolution. We like to put it another way: evolve or die. We choose EVOLVE!


Gail Bast, MBA, CAE
President

association **acumen** 

LEADERSHIP LESSONS

By Wade Wickre, CIFI, FCLA, President, IASIU



Wade Wickre is Nationwide Insurance SIU (Special Investigation Unit) Director for the Southeast United States. Wade was instrumental in forming the Virginia Chapter of the International Association of Special Investigation Units (IASIU), where he was elected Treasurer, Vice President and President of the local chapter. Wade formerly served as IASIU's Vice President for four years and currently serves as IASIU's President. He is an advisor to the National Insurance Crime Bureau (NICB) Board of Governors and the Executive Board of the Coalition Against Insurance Fraud.

For more information about IASIU, visit www.iasiu.org.

Q: Why did you decide to become involved in the leadership of your association?

A: I have been involved in organization leadership since I was a teenager. When I join an organization, it's because I'm passionate about the purpose and cause. What more can you do than learn as much as you can about your cause, get involved in it and then lead it to higher areas, making it better for those who come after you?

Q: Can you describe your average work day?

A: When I'm in the office, I'm up by 5:30 am, go for a 30 minute walk, get to work by 7:15 am and work till 6-6:30 pm, returning home. While on the road, I go through the same morning routine, attend meetings, usually starting at 8:00 am and continuing until 5:30 pm. Dinner follows at 6:00 pm and then I'm back to the hotel by 9:00 pm to catch up on e-mail.

Q: Describe the three most important traits board members should possess.

A: A board member should be willing to work, develop new ideas and bring viable solutions to the board.

Q: How should you mentor a new board member?

A: A new board member should be accepted by the board and immediately put to work with a more experienced board member who is chairing a committee that the new member is interested in. Encourage the new board member to contribute at board meetings. Giving the new member a meaningful role is helpful and providing every board member's phone number and email invites the new member with the opportunity to get connected.

Q: How do you manage conflict on a board to achieve consensus?

A: A lot of conflict can be handled in committees. Let committees come up with solutions after good discussions with committee members. This approach alleviates any single member of the board feeling like they are standing alone on issues.

Q: How do you build board trust?

A: Board trust is built when board members work together with a common goal to complete the work they have to do. While working side by side and by participating in board activities, a relationship is formed between members. A cohesive bond that is encouraging, thoughtful and respectful of each person on the board is also helpful.

TECH TIPS FOR LEADERS

by Sarah Martis, CAE, Director of Association Services

An Association Acumen client, the National Vehicle Leasing Association, is partnering with Beth Ziesenis, self-proclaimed Nerdy BFF, to help members and conference attendees navigate the throngs of tech tools and apps that profess to increase your productivity. Having attended a session with the Nerdy BFF myself and after personally piloting both successfully and unsuccessfully a number of these apps, here is a quick rundown of those that would be great additions to your bag of tech tricks.

- [TripIt](#) – Simply sign up and send your flight/hotel/car reservation confirmation to the email you used to register and they are automatically imported into the app. Track all of your flights in one place, share your itineraries with other parties in your trip or with those staying behind. TripIt will notify you of flight delays, gate changes, etc. The paid version (\$50/annually) keeps track of all your award points.
- [Expensify](#) – Create a report for your trip and take photos of your receipts as you go. When you return home, you can email a PDF of your receipts.
- [Calm](#) – Calm offers several scenic views with accompanying sounds. You can utilize guided meditation or simply put it on while

you are working to bring a natural and calm vibe to your work or home environment.

- [IFTTT](#) – If This, Then That (IFTTT) connects your apps to make them less work for you. You can create your own 'recipes' to connect your apps or choose from their long list of existing and evolving



recipes. For example, if you have a phone photo library that maxes out your phone storage, you can use the recipe that sends all your phone photos to your Dropbox folder.

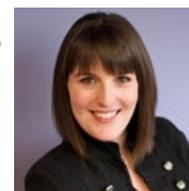
- [Fancy Hands](#) – Fancy Hands provides virtual assistants starting as low as \$30/month or \$6/task. You can submit requests by phone, web, text, email or through an Android or iPhone app. Assistants can take care of scheduling, purchase items for you, research anything, make phone calls and much more!

- [Fiverr](#) – Need a logo, voice over, or even a jingle? Fiverr is a community of freelance professionals who will create these things for you and much more, beginning at \$5.

- [CamCard](#) – This app stores all of the business cards you collect in one clean app that can be shared across devices and accessed from anywhere. This app accurately reads cards in 16 languages, allows you to exchange e-cards with other users and keeps you apprised of developments within your contacts' companies.

Enjoy!

Sarah J. Martis



Sarah Martis, CAE

STRATEGIC PLANNING:

How Two Organizations Charted their Unique Path

Federation of Clinical Immunology Societies (FOCIS)



The FOCIS Board of Directors invested in hiring a consulting firm to do a strategic review. The consultants conducted surveys with both internal and external stakeholders. FOCIS staff provided history, membership and meeting/course demographics, fundraising metrics and financial data. The FOCIS Executive Committee identified three strategic priorities: Community (emphasizing increased member retention and engagement with affiliate groups); Industry Engagement (focusing on increased sponsorship revenue and relationships) and Brand Recognition (creating new marketing materials to convey the unique role FOCIS plays in human immunology). Each strategic priority has a champion, either a board member or committee chair, who will monitor and support each area, then report on progress. The goals under each strategic priority are measurable and have set deadlines for completion.

Women in Ophthalmology (WIO)



The WIO Board of Directors held a strategy meeting at WIO's Summer Symposium in August, 2015 to identify strategic goals and action items; clarify the mission and vision of the organization and identify three SMART (specific, measurable, attainable, realistic, time-bound) strategic priorities for the next year.

WIO staff presented an environmental scan which included statistics on membership, the annual Summer Symposium, finances and macro ophthalmology data. The WIO President and Executive Director collaborated on a concept called Speed Visioning. Board members, after considering what the organization meant to them, took three minutes to write a WIO elevator speech. Several overlapping themes emerged: surgical education, connections with others, mentorship, leadership, comfortable environment, podium presence and interdisciplinary education. Next, the board broke up into groups to identify SMART goals for three pre-determined areas of focus: membership, organizational structure and strategic alliances. All goals will be accomplished in 2016.

ASSOCIATION ACUMEN ACHIEVES THIRD AMCI ACCREDITATION

Association Acumen was recently re-accredited by the Association Management Company Institute (AMCI). Among 500-plus Association Management Companies, only 81 have achieved AMCI accreditation, demonstrating the commitment to deliver the highest level of professional management services to association clients. AMCI is the trade association for the association management industry. Association Acumen had to undergo a stringent evaluation by an independent auditor, who reviewed its operating policies and procedures onsite. Association Acumen continues to demonstrate proficiency in client contracts and financial controls, insurance requirements, employee selection, evaluation and training.



SPOTLIGHT ON... 2015 ASSOCIATION MILESTONES

The Society for Vascular Nursing

- Implemented the Dare to Make a Difference campaign, resulting in a 4,000% increased member engagement on social media, 139 new Facebook likes and 52 new Twitter followers
- Increased membership 26%



The Society for Mucosal Immunology

- Held a successful scientific congress in Berlin, Germany, attracting more than 750 scientists from 34 countries
- Partnered with the Bill and Melinda Gates Foundation to award more than \$65,000 in travel funds to young scientists and scientists from under-represented countries



NEWS OF NOTE



Michael Bieger
Senior Director for
Global Procurement,
ADP, LLC
Executive Vice
President, AFLA

Michael Bieger Named Fleet Executive of the Year

Michael Bieger, Senior Director for Global Procurement at ADP, LLC and Executive Vice President of AFLA, was named the 2015 Fleet Executive of the Year at the Automotive Fleet & Leasing Association's (AFLA) annual conference in Nashville, Tenn., on Sept. 15, 2015. The award is sponsored exclusively by the CEI Group.

Bieger is a 19-year fleet veteran, starting his career with Hoffmann-La Roche before joining ADP. He is responsible for ADP's global logistics spend and directs the North American fleet team of three associates, managing more than 1,100 sales vehicles in the United States and managing the European Union fleet of 1,105 vehicles spread across 12 countries.

Bieger's recent accomplishments include a carbon-dioxide reduction plan that requires each of the 2015 model year vehicles adopted by the fleet to be either a hybrid or clean diesel rated at the minimum of 40 mpg, resulting in a 20.8-percent in average fuel economy and a savings of more than \$400,000 in the current fiscal year. Bieger said he was "surprised" by the award and noted that his time in fleet has been rewarding and enjoyable.

Leadership Acumen is published by Association Acumen, LLC, three times per year to bolster leader development and support organizational evolution. Association Acumen is an accredited full service association management company that is intently focused on its clients and hard-wired to the latest trends and advances the industry offers. Acumen's goal is to work seamlessly with leaders to advance your mission.

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WHAT'S NEW & WHO'S WHO



Bill Elliott, Association Executive at Association Acumen, has earned the Certified Association Executive (CAE®) designation, granted by the American Society of Association Executives (ASAE). Elliott serves as the Executive Director for the Automotive Fleet and Leasing Association and the International Association of Special Investigation Units. Elliott enjoys identifying new opportunities for associations to grow. Prior to working at Association Acumen, Elliott worked at the Wisconsin Hotel & Lodging Association, where he served as Vice President of Revenue Development.



Melinda VerDuin, Membership and Marketing Manager, is an experienced association management professional with years of experience with local and statewide associations. In her roles with the Federation of Clinical Immunology Societies (FOCIS) and Women in Ophthalmology (WIO), Melinda is responsible for membership and marketing activities, managing websites and social media channels and content development for print and electronic publications. Melinda holds a Graduate Certificate in Nonprofit Management and Leadership from the University of Wisconsin-Milwaukee and a Bachelor of Science degree in Business Administration from Winona State University in Minnesota.



Greg Haag is the Membership & Marketing Manager for the International Association of Special Investigation Units (IASIU). He is responsible for creating and executing marketing plans, managing the membership database, updating the website and coordinating the publication of newsletters. Greg has an extensive background in marketing and customer service and is passionate about staying on top of today's marketing and social media trends. He holds a bachelor's degree in English from UW-Oshkosh and an MBA in Marketing from Marylhurst University.

COMING IN THE NEXT ISSUE

- More Leadership Lessons from Wade Wickre, CIFI, FCLA
- Top Tech Trends at Acumen
- The Board's Duty of Foresight
- Developing the Leader Within: A New Interactive Program
- More 2015 Association Milestones
- Spring Meeting Snapshots: Society for Vascular Nursing and the National Vehicle Leasing Association
- And MORE!



Let us know how we're doing! Please click here to complete a brief survey. Thank you for your help!