

Dear Friends,

Welcome to our FY2019 Annual Report, a year marked by energy, excitement, inspiration and growth!

While the Chicago market as a whole grew 4 percent, our membership grew at nearly twice that rate to nearly 8 percent. We attribute this success to our ability to meet members' needs by creating compelling content, forging deep and meaningful community connections, and providing career opportunities to help enhance and advance members along their path to professional success.

A few of this fiscal year's noteworthy achievements include:

- Launching a new Learning Management System
- Creating a new content-rich online resource with data about the Chicagoland association market
- Selling out our popular Forum Forward conference
- Developing new programs to engage with young professionals and CEOs
- Forming three new industry partnerships
- Changing our traditional foundation model to include an innovative think tank

The blueprint that serves to align these business operations and guide strategies is our Strategic Plan. This fiscal year, we embarked on two new priorities: building our brand awareness and enriching membership experience, and we are pleased to report that we have made significant progress in both areas.

Core to our overall strategic direction is a key theme throughout all that we do: our commitment to diversity and inclusion. Our Welcoming Environment® initiative embodies who we are as an association and as individuals working for the greater good, and it is infused into all our programs and activities. Quite simply: it's the way we do business. We recognize and understand that when an association values differences and creates a welcoming environment — one that is comfortable, inclusive, and empowering — it opens the door for innovation, increased participation, and an elevated sense of community and belonging for all.

As we look ahead, our future looks bright and full of promise. We will continue to build on our successes, and are energized, excited, and inspired by our progress. However, none of these accomplishments would be possible without the support of a dedicated and passionate team, our staff, Board of Directors, strategic partners, and countless volunteers, all of whom work tirelessly each and every day to help us carry out our mission. It is because of them that we were able to make significant strides toward our goals to advance the association management profession and the Chicagoland community. Read more on the following pages about our accomplishments and milestones that are positively impacting our community.



Lynne Thomas Gordon, CAE Chair 2018-2019



Michelle Mason Michelle I. Mason, FASAE, CAE President and CEO

Who We Are

Association Forum is the "association of associations" in Chicago. Founded in 1916, Association Forum has more than 4,000 members today. The association community in Chicagoland represents more than 1,700 associations, which in turn serves nearly 29 million individual members and spends an estimated \$10.3 billion annually on meetings alone in the Chicagoland area. Next to Washington, DC, Chicago is the nation's largest association head-quarters city. Additionally, more healthcare associations are headquartered in Chicagoland than anywhere else.

What We Do

Association Forum's mission is to advance the professional practice of association management. This is done by providing essential learning, powerful resources, and compelling experiences for association professionals and those who serve the association community. Association Forum produces Holiday Showcase — the Midwest's largest meeting sites and business services exposition — publishes the award-winning FORUM magazine, provides learning opportunities addressing varied needs of association professionals as they advance in their association management careers, is an approved Certified Association Executive (CAE) provider and exam administrator, and offers numerous association management tools and best practices. Learn more at associationforum.org.



"The role for Association Forum is to test limits, explore boundaries, and secure knowledge for all to ensure the future vitality and viability of voluntary membership organizations and to empower those committed to the profession."

Lynne Thomas Gordon, CAE Executive Director, American Association of Orthodontists

Strategic Plan: Painting a Picture to 2025

A painted picture is a vision of what Association Forum will look like in the future. It communicates where we are going, how we intend to get there, and the results we expect to achieve. It is both aspirational and inspirational. Here is our painted picture:

"It is the year 2025, and Association Forum is a recognized leader in innovatively creating unique experiences that captivate and engage the association community. We have achieved unprecedented growth through being an advocate for the profession, as well as developing partnerships and alliances that are attracting the attention of constituents from various levels, including local, state, and national. Our membership mirrors the diverse workforce of the future. Our digital culture has transformed the business model to be agile, relevant, and responsive. Staff resources have evolved to accelerate growth and be receptive to the new era of business. We are a welcoming environment with authentic relationships across our community."

To access the Association Forum FY2019 Strategic Plan, visit http://bit.ly/2YEtPc3



Highlights & Accomplishments

Building on the accomplishments of previous years, in FY2019, we embarked on two priority areas:

- Building Brand Awareness
- Enriching Member Experience

Both areas of focus will continue into FY2020

Building Brand Awareness

On the brand awareness front, our ultimate goal is to expand our brand influence, both internally and externally. To that end, we worked to define and activate our brand promise through more customized and meaningful experiences for our entire community. A few of our strategies and accomplishments included assessing content gaps, which resulted in launching a Shared Interest Group for association management companies and establishing a Public Policy Advisory Council to advise us on policy issues; leveraging industry leaders and influencers to grow our brand, which included establishing and presenting the first-ever Woman of Influence Award to Dawn Sweeney, President & CEO of the National Restaurant Association; and growing strategic regional, national, and international partnerships with the Illinois Society of Association Executives, National Association of Manufacturers, and Destinations International.

Enriching Member Experience

When it comes to member enrichment, our aim is to deliver a relevant and engaging experience for all association staff as well as those who work for supplier companies that serve the association community. A few of our strategies and accomplishments included expanding engagement through digital assets, which involved launching a new Learning Management System; increasing engagement among young professionals through the establishment of an Emerging Leaders Program; and connecting with the CEO community through personalized outreach, including launching our highly successful and popular CEOnly podcast series.

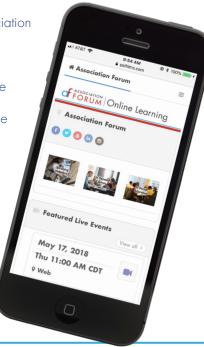
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New this Year

- Launched a Shared Interest Group for association management companies
- Formed a Public Policy Advisory Council to advise us on policy issues
- Presented the inaugural Woman of Influence Award to Dawn Sweeney, President & CEO of the National Restaurant Association
- Launched a new Learning Management System
- Created a new online resource with comprehensive data about the Chicagoland association market
- Sold Out Forum Forward
- Launched an Emerging Leaders Program
- Presented the inaugural Welcoming Environment® Organizational Award to CCIM Institute
- Launched a CEOnly Podcast series
- Launched strategic partnerships with the Illinois Society of Association Executives, the National Association of Manufacturers, and Destinations International

Associations are fundamentally about content, community, and career, and Association Forum is dedicated to meeting these needs for our members and the Chicagoland association community. Individually and collectively, we are mission-driven and mission-inspired to create and deliver compelling content, powerful and memorable experiences, and meaningful connections that propel members forward in their career success. While we are firmly grounded in the present, we are also agile. We continually have our eye on the future to spot trends shaping our industry, capitalize on innovation and technology to maximize efficiency, and leverage our collective power and strength to ensure our relevancy and serve as an association model for the future.



NEW!

AIMM: Collecting Intel from Associations for Associations

The associations meeting market in Chicagoland is a multi-billion-dollar industry. Our new online resource - Association Industry Meetings Metrics - gives members and industry partners access to valuable real-time trustworthy data and intelligence about the Chicagoland association meetings market.



Association Industry Meeting Metrics (AIMM) Partners



























To learn more about AIMM, visit http://www.AIMMForum.org



"Why do we support Assn Forum? Why wouldn't we? The Chicagoland association community is an influential and engaged group of association professionals. They support our destination and we support them. It's as simple as that." Kathleen M. Ratcliffe

President, Explore St. Louis

NEW!





Bringing Our Young Professionals Together

Young professionals represent our future, and our new Emerging Leaders program focuses on advancing the careers of those 35 and younger. The six-month cohort program teaches essential skills that help these future leaders as they advance in their careers. The program also pairs young professionals with a seasoned association mentor.

For a list of the 2018 inaugural class, visit https://bit.ly/2XJQfbL.





Powered by of ASSOCIATION FORUM

Embracing Diversity, Equity and Inclusion

The WE Summit grew out of our Welcoming Environment® initiative. Now in its second year, the summit is a day-long educational program with real-world examples and data on the impact a Welcoming Environment has on the growth and sustainability of an organization.

To access our resource kit, visit https://bit.ly/2KjRXhf.

Title Partner:

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From Holiday Showcase, You Can Go Anywhere

Holiday Showcase: Celebrating 30 Years of Content, Community & Connections

Created in 1988, the annual event remains true today to its original mission, having grown to become the premier tradeshow highlighting the strength and reputation of Chicagoland associations. Attendees heard an inspirational keynote speech by Michael Sam, the NFL player who made history in 2014 when he became the first openly gay player to be drafted by the league.

Click here to access video tributes to celebrate the 30th Anniversary of Holiday Showcase http://bit.ly/2M0jYMs

Holiday Showcase 2018 attendee profile:



CEOs are the key decision makers of their organizations, and it's an attendee category to which we aggressively promote.



Ratio of qualified buyers to exhibitors

It's a busy day on our exhibit floor as buyers vastly outnumber exhibitors, so there is always a potential client to talk to. **561**

unique organizations in attendance

Holiday Showcase is THE face-to-face event for our association community to meet. We draw both associations that are members as well as non-members – everyone is at Holiday Showcase!

Over 51%

of attendees influence meetings decisions

Holiday Showcase has been built on the association meetings industry, but the buying power of our audience extends beyond the meeting professional to include buyers and influencers in marketing, membership, chapter relations, IT and others.

Over 100 corporate meeting planners

Our community extends well beyond the associations market, giving exhibitors even more opportunities to make qualified business connections.



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Healthcare Collaborative: Focusing on Our Nation's Health

An interdisciplinary community of healthcare associations and stakeholders, the Healthcare Collaborative gathers each year in the winter and summer to discuss critical issues impacting the healthcare sector, which represents the largest industry sector of our membership at 35 percent. Since 2016, we have engaged more than 300 healthcare executives in a national dialogue.

To learn more about the Healthcare Collaborative and the Healthcare Collaborative Advisory Council, visit https://www.associationforum.org/browse/healthcarecollaborative.



"Chicago and Phoenix are two cities that have long enjoyed a unique kinship. Our strategic partnership with Association Forum has allowed us front row access to Forums members, many of whom are in the healthcare trade association space, an industry that is driving the growth of our local economy in Phoenix through innovative technologies, academia and entrepreneurship. More than ever, the role of associations has become more critical in elevating communities and shaping societies. We here at Visit Phoenix, through Association Forum, are delighted to have a seat at the thought-leadership table as it is key to our destinations success."

> Lorne Edwards, Senior Vice President, Sales & Services Visit Phoenix

Founding Partners









Supporting Partner



Association Supporting Partners











Forty Under 40: Honoring Tomorrow's Leaders

A highly prestigious competition, Forty Under 40 - a program in collaboration with USAE — recognizes 40 accomplished association or non-profit professionals who are 40 or younger, demonstrate high potential for continued success in leadership roles, and exhibit a strong passion for - and commitment to - the association management and nonprofit industries.

We congratulate our most recent honorees http://bit.ly/2Wo7hiA

Premier Sponsor:

Title Sponsors:













"The relationships built from working in this industry have been so worthwhile and have shaped who I am today."

> Forty Under 40 Honoree Emilie Mendia, managing director, Healthcare Convention & Exhibitors Association/MCI USA





Women's Executive Forum: **Bringing Our Female Leaders Together**

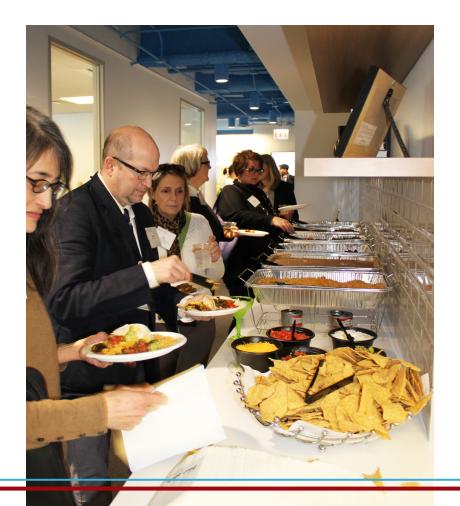
Sixty-nine percent of Association Forum's membership is female and was the impetus behind creating the Women's Executive Forum, a program that convenes the association community's current and future female leaders. More than 100 women attended this year's event, which featured a keynote address by Katy Knox, President of U.S. Trust, Bank of America.

Our inaugural Women of Influence Award was presented to National Restaurant Association President and CEO, Dawn Sweeney, FASAE, in recognition of her exceptional achievements and contributions to the advancement of the association management profession and society.



Forum After Dark: **Bringing Our Community Together**

Research shows that regardless of age, faceto-face gatherings continue to rank high as a member benefit. People crave human interaction, which is why we created Forum After Dark, a series of quarterly networking events designed to show appreciation for our members.





"For so many reasons, Association Forum is an integral part of my professional life. The organization's commitment to creating a Welcoming Environment and addressing the needs of association professionals continues to provide me with many tangible benefits. Since day-one, Forum has offered me access to the people, programs, and opportunities I need to meet my professional goals. In my role as a volunteer, I've had the opportunity to witness Association Forum's commitment to the Chicagoland association community firsthand. This association is a pacesetter and truly focuses on the future of our profession."

> Geof Brown, CAE, Chief Executive Officer. National Association of Personal Financial Advisors

Corporate Social Responsibility: Giving Back to Our Community

We believe we will do well by doing good. It is core to who we are as an association to engage members in giving back to our local community. Each year, we engage in two Corporate Social Responsibility (CSR) initiatives. This year, we selected The Cradle and Canine Therapy Corps.

The Cradle

Located in Evanston. The Cradle is one of the foremost adoption agencies in the country and has helped to place more than 15,000 children since it was founded in 1923. It also is the only adoption agency to operate an onsite, 24-hour nursery. To assist the agency with an important and vital need, we coordinated a diaper drive in conjunction with Forum Forward 2018, gathering more than 26,000 diapers from eight member associations. The National Sporting Goods Association alone collected more than 11,000 diapers!

Canine Therapy Corps

Our second CSR project was with Canine Therapy Corps in recognition of the tremendous impact that mental health disorders have on people of all ages, races, and socio-economic backgrounds. The organization's volunteers and certified therapy dogs have been serving the Chicago metropolitan area since 1991, working with healthcare, education, and social service professionals to help people recover from physical and emotional trauma. Each year, the local nonprofit provides 1,400 hours of therapy to more than 5,000 individuals free of charge. For our part, at this year's Holiday Showcase, attendees stuffed nearly 100 stockings filled with dog treats, toys, and bones to benefit 65 therapy dogs.



of 2019 Community at a Glance

Association Forum Professional Member Organizations 872

Includes 366 associations managed by AMCs



Top 3

Industries Served

Health care - 35% **Association Management - 6% Libraries - 4%**



Total Members

>4000

Individual - 30% Forum Plus - 70% Forum Plus **Organizations** -107





82% are national and international in scope

Chicagoland Associations/Non-Profits

1,725 organizations | 28.7 million members



Career Level

CEO - 16% C-Level - 8%

Forum

Membership

52% - City of Chicago 48% - Tri-State area





billion spent on meetings in the Chicagoland area each year.

Association Executive/ Supplier Partner Ratio



Partner

Executives

FY2019 Association Forum Budget Summary

	FY2017	FY2018	FY2019	FY2020
	Actual	Actual	Actual	Budget
Investment Activity				
Investment Revenue	311,159	325,135	172,481	75,000
Investment Expenses	26,457	27,655	25,623	28,500
Income/(Loss) from Investment Activity	284,702	297,480	146,858	46,500
Operating Activity				
Revenue	3,292,023	3,314,434	3,350,145	3,452,550
Expenses	3,311,199	2,881,780	3,271,734	3,451,184
Income/(Loss) from Operating Activity	(19,176)	432,654	78,411	1,366
TOTAL NET INCOME(LOSS)	<i>\$ 265,526</i>	<i>\$730,134</i>	<i>\$225,269</i>	<i>\$ 47,866</i>

FY2019 Association Forum Foundation Budget Summary

22222	FY2017	FY2018	FY2019	FY2020
	Actual	Actual	Actual	Budget
Investment Activity Investment Revenue Investment Expenses	12,416 804	11,281 891	5,051 907	5,500 900
Income/(Loss) from Investment Activity	11,612	10,390	4,144	4,600
Operating Activity Revenue Expenses	297,113 511,244	420,530 548,113	422,379 407,351	360,000 347,884
Income/(Loss) from Operating Activity	(214,131)	(127,583)	15,028	12,116
TOTAL NET INCOME(LOSS)	<u>\$(202,519)</u>	<i>\$(117,193)</i>	\$ 19,172	<i>\$ 16,716</i>

Investment Balance (Reserves): \$4.04 million (as of February 2019).

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Samuel B. Shapiro Award for Chief Staff Executive Achievement

Presented to a chief staff executive (CEO, executive director, or equivalent level) for outstanding service and accomplishments in association/ nonprofit management and is the Forum's highest honor.

DEBORAH BOWEN, FACHE, CAE

President and CEO American College of Healthcare Executives

Click to hear Deborah's story: http://bit.ly/2HIsMkD



John C. Thiel Distinguished Service Award

Presented to an individual association or supplier partner member for exceptional, long-term volunteer service through committee service or similar contributions.

EVAN WILLIAMS, CAE, IOM

Director of Professional Services and Resources Appraisal Institute

Click to hear Evan's story: http://bit.ly/2YH7o6i



Association Professional Achievement Award

Presented to a non-CEO association member for exemplary service and outstanding accomplishments in association management.

KATE DOCKINS, CAE

Vice President/Volunteer Leadership Development Institute of Food Technologists

Click to hear Kate's story: http://bit.ly/2HtWniJ



Inspiring Leader Award

Presented to an individual who has established a culture leading to employee satisfaction, motivation, engagement, and

PAULI UNDESSER, BS, MS, MWS, CAE Executive Director Water Quality Association

Click to hear Pauli's story: http://bit.ly/2VHVc2Z



Welcoming Environment Organizational Award

Presented to an association that has demonstrated exemplary outcomes in providing an inclusive and welcoming environment and culture.

CCIM INSTITUTE

Click to hear CCIM's story: http://bit.ly/2KAlanl

Afterglow Partners

Title Partner

Experience Partner













Foundation Strategic Partner



Award Partners



PORTLAND VISITOILAND

Flanders



Strategic Partner

Table Partners









Honors Partners

















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Synchronicities

Revitalizing the Association Forum Foundation

Founded in 1987, the Association Forum Foundation is a separate 501(c)(3) organization designed to enhance our programs and services through education, research, and scholarships.

This year, our board voted to revitalize the Association Forum Foundation to include a think tank. In addition to recognizing our Chicagoland leaders and issuing scholarships, we will include a new element that actively engages the association community by identifying potential disruptors, raising critical issues, and developing meaningful solutions for associations today and into the future.



AF Foundation Strategic Partner





Bree Anne Sutherland Scholarship

Felicia Owens, Governance Program Manager for the Society of American Archivists, was awarded the Bree Anne Sutherland Scholarship, named in memoriam of our former director of learning, a passionate advocate of adult education who died tragically in a car accident in 2016. Now in its second year, the scholarship provides one year of unlimited access to Association Forum's educational programs to a young professional. The recipient is also paired with an industry mentor.

Read more about Felicia in the March 2019 issue of FORUM: http://bit.ly/30zRzjp



D. Michael Ferguson Scholarship

Jessie Paré, meeting specialist for the Society of Gynecologic Oncology, received the D. Michael Ferguson Scholarship, named after the late former senior director of programs and meetings at the Million Dollar Round Table. Funded by the MDRT Foundation, the \$1,000 scholarship contributes toward the registration fee and related expenses to attend the Professional Convention Management Association annual meeting.







Phil Lesser Scholarship

Awarded annually to four individuals, the scholarship enables recipients to attend Association 101 foundation courses in association management. This year's recipients are Laura Barker, membership and communications specialist for the REALTORS Land Institute: Daniel Cox. administrative assistant for the American Burn Association; Eric Larson, education coordinator for NAMA; and Hazel Oreluk, director of research for the American Orthopaedic Foot & Ankle Society.

The scholarship is named for Philip Lesser, PhD, CAE, vice president and lead consultant for Bostrom consulting practice, whose commitment and expertise in strategic planning, volunteer and staff development, organization structure, and bylaws are just a few ideals and characteristics that recipients embody. This scholarship is made possible by Bostrom.



John J. Prast CAE Scholarship (Million Dollar Round Table)

Emily Fairall, MBA, marketing manager for the Association of Nutrition & Foodservice Professionals, was awarded the John J. Prast CAE Scholarship, which covers the cost of the CAE application fee, study course registration, and assistance with standard study materials. The scholarship was established in the name of the Million Dollar Round Table's retired chief executive officer, John J. Prast, CAE, an association professional who strongly supported the value of the CAE.

With Much Gratitude to Our Donors

We owe so much to our many generous donors who have supported us throughout the years.

For a list of our donors and to donate to our Foundation, visit http://bit.ly/2VSLy2N





PARTNERS Make it POSSIBLE

We could not do everything we do without the generous support of our many partners, sponsors, and volunteers. It is due to their time and generosity that we are able to administer high-impact, quality learning, and networking experiences for our members.

Association Forum Partners

Strategic Partners

















Year Round Partners































PARTNERS Make it POSSIBLE

Holiday Showcase Partners

CEOnly® Summit Partners

Supporting Partner

Breakfast Partner



Title Partners







Closing Reception Partner





CEOnly® Reception Partner



Opening Reception Partner





Brunch Partner



Brunch Keynote Partner





Corporate Social Responsibility Partner



Registration Partner



Education Partners











Experience Partners







































Left to right: Marc Anderson, Michelle Mason, Mitchell Dvorak, Colleen Lawler, Geoffrey Brown, Carol Pape, Gregory Heidrich, Lynne Thomas Gordon and Rob Paterkiewicz



2018-2019 Association Forum Board of Directors

Our board represents the wide diversity of organizations that form and support the Chicago-area association community.



(automatically succeeds from Chair-Elect) Lynne Thomas Gordon, CAE Executive Director American Association of Orthodontists



CHAIR-ELECT (automatically succeeds from Secretary-Treasurer) Mitchell Dvorak, MS, CAE Executive Director International Association of Oral and Maxillofacial Surgeons



SECRETARY-TREASURER (one-year term) Geoffrey Brown, CAE Chief Executive Officer National Association of Personal Financial Advisors



IMMEDIATE PAST CHAIR Rob Paterkiewicz, CAE, MBA, IOM Executive Director & CEO Selected Independent Funeral Homes



DIRECTORS (three-year term) Marc Anderson Executive Vice President Choose Chicago



(three-year term) Kimberly Mosley, CAE President American Speciality Toy Retailing Association



(three-vear term) Carol Pape, CAE Chief Operating Officer Association of Professional Chaplains



Gregory Heidrich Executive Director Society of Actuaries



Brad Kent, CTA Senior Vice President/Chief Sales & Services Officer Visit Dallas



Colleen Lawler, CAE, IOM Executive Director Society of Cardiovascular Anesthesiologists



Paul Pomerantz, FASAE, CAE Chief Executive Officer American Society of Anesthesiologists



Butch Spyridon President/CEO Nashville Convention & Visitors Corporation



EX-OFFICIO MEMBER Michelle I. Mason, FASAE, CAE President and CEO Association Forum



LEGAL COUNSEL Jed R. Mandel, J.D. Partner Chicago Law Partners LLC

To learn more about the dedicated and passionate Association Forum team visit: http://bit.ly/2EoyE1t



Be A Welcoming Environment

We are a welcoming environment that actively seeks to enhance the larger community by recognizing the whole is greater than the sum of its parts. We will make everyone who interacts with us feel welcomed, represented, engaged, inspired and empowered.

Embrace Innovation and Quality

We love to try new ideas and seek inspiration from inside and outside the association community—we value improvements big and small. Experimenting with breakthroughs is encouraged and celebrated; however, we know when to pull the plug. We aim to continuously improve.

Have Fun and Stay Positive

It's a fact that you generally spend more time with your co-workers than you do with your own family. We strive to make our work environment one that is tun, positive and an overall great place to work.

Open and Honest Communication and Teamwork

You don't know what you don't know! Effective communication is key. We shall cultivate an environment where we speak openly, honestly and with the goal of building a better team. Candor is constructively embraced. We will work collaboratively to deliver value to members.

Accountability—Own It

We hold each other accountable and expect people to respectfully ask questions and raise concerns. Because work requires interdependent teams and collaboration, we will trust and depend on each other to be responsive and to deliver value and quality services to stakeholders.

Win with Integrity

We operate ethically, contributing our time, talents and know-how to advance our communities where we work and live. We commit to growing our association in ways that benefit the environment and society.