WAKE-UP CALL

HOW CONSULTANTS ARE HELPING ASSOCIATIONS RISE TO THE NEW CHALLENGES OF A POST-PANDEMIC FUTURE  6

BUILD TRUST FOR A PRODUCTIVE RELATIONSHIP  3

5 QUESTIONS FOR YOUR NEXT RFP  4
Connections can be powerful, and so can you.

Do more with connected software from MemberClicks
From financial planning to online learning to executive search, consultants have learned to pivot fast in response to the pandemic. They’re helping their clients to do the same.

**Cool in a Crisis**

*By Mark Athitakis*

6

**From Where I Sit**

A Year of Reinvention

*By David Martin*

2

**Upfront**

Nurture the Relationship

Five Smart Questions to Ask in Your Next RFP

3

11

**Consulting Services Directory**
Greetings, fellow association professionals! I think it is safe to say that at the start of 2020 no one saw the tumultuous year we would have ahead and the significant transformation associations would face. Organizations have felt the public health and economic impact of the COVID-19 pandemic, and they've been called on to consider how they can support a broad movement for criminal justice reform and racial equality. As consultants, we have found ourselves in the unique position of advising association clients on some of the same issues we are addressing within our own businesses.

In recent years, diversity, equity, and inclusion (DEI) have received increased attention in the association world. We have seen organizations address these issues more fervently and openly this year. Associations have been taking tangible steps to foster greater inclusion not only in their hiring processes, but also within their membership ranks. The services of DEI consultants are more sought-after than ever, and new positions are being created within organizations for directors of DEI.

At the same time, associations are addressing the operational and financial changes brought on by the pandemic. Most spring, summer, and now autumn meetings have gone virtual, and many organizations are already planning for virtual conferences through mid-2021. The ASAE Collaborate forum has been filled with extensive conversations and excellent ideas about new approaches, recommendations for virtual platforms, and consultants' expertise. Staff, CEOs, strategy consultants, attorneys, and vendors have all stepped up to offer their ideas.

The pandemic has forced organizations to look at their operations from top to bottom. Some are offering new membership models in an effort to bring in new members and encourage current members to remain involved. Any programs that were languishing but hanging on may have gone to the chopping block more quickly.

A whole new vocabulary has been introduced. Who knew we would be discussing “Zoom bombing,” “Zoom fatigue,” or “virtual happy hours”? It has been an exhausting seven months for almost everyone. Association staff members and consultants are living in an “always on” world. Managers are trying to be supportive and deal respectfully with the full array of their employees’ personal situations, as well as with the technical challenges of coordinating remote teams.

Associations are still sorting out the operational issues associated with remote work, but many are discovering numerous upsides to the arrangement. Among them are better work-life balance, less commuting time, more inter-departmental interaction, a smaller office footprint with possibly lower real estate costs, and access to a larger national talent pool. Many are evaluating how and when to safely bring staff back to the office, while some are discussing whether to go virtual permanently.

In this guide, you will find consultants with a range of expertise—everything from diversity and inclusion to information technology to business operations. They’re here to support associations as they navigate these times, offering the knowledge and perspective needed to turn 2020’s challenges into positive, long-lasting changes.

David Martin, chair of ASAE’s Key Consultants Committee, is CEO and managing partner of Sterling Martin Associates in Washington, DC. Email: dmartin@smartinsearch.com
A partnership between an association and a consultant will be best positioned to achieve its goals when the two have a good relationship—and building one requires a little work.

“Any relationship you have is about trusting that provider with a key part of your association’s opportunity for success,” says Laurie Kulikosky, CAE, deputy director of the American Society of Transplant Surgeons. “Creating those relationships is really important. It’s an actual ongoing relationship that you want to have, and that needs care and feeding from both sides.”

A few key steps will help you establish a solid foundation for working together.

**Start on the same page.** Tim Hopkins, a senior consultant at McKinley Advisors, says it’s important to set out with a shared understanding of the work ahead. “The initial kickoff meeting should have a list of questions from both the client side and consultant side, so you come to alignment up front,” Hopkins says. “That provides clarity, and it allows for the client to ask questions that enable the consultant to showcase their knowledge and share similar scenarios they’ve seen in other organizations and begin to brainstorm potential solutions.”

Kulikosky agrees that a good start matters. “It’s really important for your association to put in the work ahead of time to outline what you’re looking to get out of the relationship,” she says.

Cost is also an area where clarity is important. “When costs aren’t clearly laid out in advance of the work, that can lead to a problem,” Hopkins says.

**Plan your next steps.** “You’ve put a lot of time and effort into defining how to start the relationship, but perhaps not a lot of thought into how to continue it,” Kulikosky says. “It helps to have a main point of contact and for that main point of contact to understand strategically what you want to get out of the relationship. Where do you see the work going? What does it look like at the three month, six months, or one year down the line?”

**Remember everyone is part of the team.** A commitment to collaboration will improve focus. “Treat the consultant as a member of your team, since they are on the outside looking in,” Hopkins says. “It’s important to bring them in and foster a level of trust so they can understand the true inner workings as best as possible, and that will enhance what they deliver in the end.”

**Communicate regularly.** Keeping information flowing is essential to keeping the work on track and maintaining trust. “You can schedule regular check-ins so that things don’t get away from you, so that the relationship doesn’t get away from you,” Kulikosky says. “Is there something new that is happening with the association? Having standing check-ins is helpful.”

Hopkins adds that, for consultants, overcommunication is a good thing. “The last thing clients want is to be surprised by anything, especially when it comes to their expectations and needs,” he says. “Overcommunication can lead to clarity, and that goes a long way in the success of a project.” —Rasheeda Childress
FIVE SMART QUESTIONS TO ASK IN YOUR NEXT RFP

Requests for proposals are often more like obstacle courses than platforms for consultants to meaningfully show what they can do. Here are some questions to help you find just the right partner to meet your business needs.

1. **What is your vision?** Instead of concentrating on the format of the RFP and asking consultants to jump through hoops, focus on what your organization is trying to do. Ask the consultant to provide their vision of how they would make that happen.

2. **What sets you apart?** Ask what is unique about the consultant and their company that is going to be particularly helpful to you in solving the challenges outlined in your RFP.

3. **What’s your solution?** Again, focus more on what you are trying to get done and less on how you want it done. Outline the business problem you’re trying to solve. Then let the consultant tell you how they would solve the problem—not how he or she would manage your way of solving the problem.

4. **What’s your story?** Give respondents the chance to tell their story and show what their core differentiator is—for example, by describing what they’ve done for other organizations that was particularly valuable. RFPs are often like grids, Breeden says. They adhere to a rigid structure that does not allow for much storytelling or personalization, and they often relegate descriptive answers to an appendix. Those narratives are critical and should be collected in the body of the RFP, he says.

5. **What have we missed?** Ask the consultant what questions you didn’t ask in the RFP that you should have—and how they would answer. “The upside is you may get some innovative ideas even before you hire somebody,” Breeden says. You might not agree with it, but the response shows the consultant can be innovative in their thinking.

“You’re looking for somebody who’s going to be willing to push back and tell you that you should do some things differently, and maybe you’re wrong about some of your assumptions,” he says. In a way, “you’re asking them to consult for you before you even engage them.” —Lisa Boylan
Spark Growth

To get results, association leaders need to connect marketing tactics with organizational strategy.

The team at Halmyre specializes in tailoring growth strategies to provide

- Revenue and pricing optimization,
- Better member experiences,
- Unique value propositions,
- Insightful marketing intelligence, and
- Member personas.

When it’s time to do things differently, Halmyre provides the marketing leadership you need.

halmyre.com
From financial planning to online learning to executive search, consultants have learned to pivot fast in response to the pandemic. They’re helping their clients to do the same.

BY MARK ATHITAKIS
The COVID-19 pandemic hasn’t changed everything about associations. They’re still in the business of educating members and giving them opportunities to meet and network. But there’s no question that the novel coronavirus has forced associations to act more quickly than usual to address lockdowns, remote work, and more.

Associations have traditionally relied on consultants to address issues that are beyond the scope of staff, and one thing the pandemic has revealed is that consultants’ guidance is as essential as ever.

The shifts are visible in a variety of areas that rely on consultants’ expertise. But they’re particularly acute in finance, as associations scramble to manage (or dip into) reserves; learning, as meetings pivot to virtual and hybrid formats; and executive hiring, where the skill sets demanded of leaders have changed substantially in recent months. Consultant experts who work in all three of those arenas agree that it’s critical for associations to adapt but also to stay steady and strategic, preparing for an environment that is likely to be radically changed even after the current crisis is over.

**A FINANCIAL WAKE-UP CALL**

The spring of 2020 delivered a double whammy to the finances of many associations. A stock-market tailspin erased years of above-average gains in reserves, while global stay-at-home orders and travel restrictions forced the cancellation of in-person conferences that are the biggest revenue driver for many associations. Those two impacts served as a much-needed wake-up call for associations to think about their financial safety nets, says Rob Olcott, FASAE, CAE, principal of the Olcott Group, a nonprofit financial consulting firm.

“Associations and other nonprofit organizations are being forced to take a hard look at their financial circumstances and will need to be more open to looking at strategies that they may not have looked at before,” he says.

The conventional wisdom about the amount of reserves an association needs to have on hand is varied—recommendations run anywhere from three to 12 months of operating expenses. But a more productive conversation, Olcott says, is sparked when association leaders think about what their goals are, determine what risks are involved, and then set sensible savings targets. And though the pandemic was a quintessential “black swan” event that can’t in itself be planned for, wise associations expect and prepare for the occasional disruptive event. “You might build a model which says, ‘OK, we think once every 20 years there could be a 10 percent decline in attendance at our annual convention, and the dollar impact would be X. So we need to build that into our assumptions about the size of our reserves.’”

As associations work to get back to financial stability, A. Michael Gellman, founder of the consulting firm Fiscal Strategies 4 Nonprofits, recommends they narrow their horizons in the short term—think quarterly budgets, not annual ones. “I hope we can eventually abandon that—it’s not a permanent thing,” he says. “But it works for now in the pre-recovery phase, and it’s driven by the fact that we’re reacting to uncertain changing conditions. We can’t do one-week budgets, but an annual budget is sort of meaningless in this environment.”

But even once annual budgeting returns to something closer to normal, Olcott suggests that associations looking for financial guidance should ask consultants to deliver tailored approaches, and they should consider more than a firm’s past performance.

“Groups selecting an investment advisor would ask in an RFP, ‘What has your performance looked like over the past five or 10 years?’ But there’s a good reason for the disclaimer ‘past performance is no guarantee of future results,’” he says. “Investment returns over the next 10 years are not likely to match returns from the last decade.”

**LEARNING LESSONS**

Just as associations have hustled to stabilize their finances, they’ve also rushed to shift their educational programming to online platforms. The abundance of free or low-cost options has been a mixed blessing in that regard. Zoom, for instance, is easy to use, but it’s not the right format for every form of association learning, and Zoom fatigue is real.

Whether online or in person, education is “about designing experiences,” says Josh Yavelberg, cofounder of Flying Cloud Solutions, an educational technology consulting firm. “And with any experience, you need to think about who the audience is, who you’re bringing into the room, why you’re bringing them there, and how you engage them.”

The variety of online and mobile tools ought to be used to fit learning into members’ busy lives. At Yavelberg’s former association, the National Recreation and Park Association, he learned that many members were too on-the-go to sit still for a webinar. “They’re maintenance workers, and they’re not sitting in front of a computer all day,” he says. “If you’re not delivering content that’s meaningful to them, they’re going to go on YouTube and figure it out. So you have to focus
Consultant experts agree that it’s critical for associations to adapt but also to stay steady and strategic, preparing for an environment that is likely to be radically changed even after the current crisis is over.

Bottom line: Associations are still sorting out how to be confident not just in their next major hire, but in the process that led to it.

“It’s hard to say there’s a best practice yet,” Martin says. “Both the organizations and search firms have had to be flexible and adopt new approaches quickly. We’ve all had to make it up a little bit as we’ve been going along.”

MARK ATHITAKIS is a contributing editor to Associations Now. Email: mathitakis@asaecenter.org

STILL HIRING
Despite restrictions on travel and financial belt-tightening, associations are still pushing forward with searches for CEO roles and other top executive positions, says David Martin, CEO of Sterling Martin Associates, an executive search firm for associations. But search committees’ expectations of candidates have changed markedly, as has the search and interview process.

“There’s been more of an emphasis on crisis management,” he says. “Search committees really want to know if [candidates have] dealt with something major like this in the past, and how it turned out.”

Search committees are also looking for “new normal” skill sets, he says, like the ability to manage teams remotely and to be decisive on tough financial matters like cutting budgets and instituting furloughs and layoffs. But because the stakes are higher, many committees are anxious about hiring a leader they haven’t had an opportunity to meet in person. So Martin’s firm talks with them about adding layers to the process to provide more assurance.

In some cases, clients have held “social” Zoom calls with candidates in addition to more formal interviews to get a better sense of cultural fit. And that’s meant that the candidates have had to improve their virtual-interviewing game as well, Martin says. His firm also coaches job seekers, and he advises them to have mastered their Zoom 101 skills, lest they look unprepared for virtual management. His top tips: Don’t be confused about audio, video, and screen-share settings; think about the lighting in the room where you’ll be interviewed; and look into the camera, not at the screen, when you’re speaking.

Some clients, Martin says, are looking into safe ways to conduct hybrid interviews, where early rounds are handled online but final ones are done in person. Such discussions about process turn on feelings about the candidates as well as the comfort level of committee members; one of them might have to be recruited for a socially distanced walk-and-talk or meal.
Talley Management Group, Inc.

Creating Stronger Communities and Human Connections to Enhance Global Society since 1987.

Full-service Management
Meeting & Event Management
Consulting Services
Virtual & Hybrid Meeting Strategy & Management

talley.com
talley@talley.com
# Consulting Services Directory

All listings in this directory are paid listings. Information was provided by each company.

<table>
<thead>
<tr>
<th>Services</th>
<th>2040 Digital LLC</th>
<th>AChurch Consulting</th>
<th>ALTAI Systems AMS Solution</th>
<th>AMPED Association Management</th>
<th>ARTISAN E-Learning</th>
<th>ASSOCIATION DEVELOPMENT SOLUTIONS (ADS)</th>
<th>ASSOCIATION EXECUTIVE GROUP LLC</th>
<th>ASSOCIATION HEADQUARTERS, INC.</th>
<th>ASSOCIATION METRICS, INC.</th>
<th>ASSOCIATION STRATEGIES, INC.</th>
<th>ASSOCIATION STRATEGIES Rewired</th>
<th>BEACONFIRE, A DIVISION OF ALLEGIANCE FUNDRAISING GROUP</th>
<th>BEYOND DEFINITION</th>
<th>BLOOM &amp; RED SOCIAL MEDIA OFFICE</th>
<th>BOSTROM STRATEGIC CONSULTING</th>
<th>BROWN &amp; COMPANY</th>
<th>CIMATRI</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMMUNICATIONS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PUBLIC RELATIONS</td>
<td>MEDIA RELATIONS</td>
<td>MEDIA TRAINING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PUBLISHING</td>
<td>MEDIA</td>
<td>SOCIAL MEDIA</td>
<td>DIGITAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WEB SERVICES (DEVELOPMENT</td>
<td>DESIGN)</td>
<td>CONTENT STRATEGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FINANCIAL</td>
<td>INSURANCE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACCOUNTING</td>
<td>AUDIT SERVICES</td>
<td>FINANCIAL CONSULTING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INSURANCE (LIFE, HEALTH, LIABILITY, ETC.)</td>
<td>RETIREMENT PLANS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INVESTMENT CONSULTING</td>
<td>ADVISORY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOVERNANCE</td>
<td>STRATEGY</td>
<td>FUTURES THINKING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENVIRONMENTAL SCANNING</td>
<td>SCENARIO DEVELOPMENT</td>
<td>FUTURES RESEARCH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOVERNANCE</td>
<td>BOARD DEVELOPMENT</td>
<td>STRATEGY CONSULTING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEADERSHIP DEVELOPMENT</td>
<td>ORGANIZATIONAL DEVELOPMENT</td>
<td>ETHICS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARKETING</td>
<td>MEMBERSHIP</td>
<td>MEETINGS</td>
<td>REVENUES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONFERENCES</td>
<td>PLANNING</td>
<td>LOGISTICS</td>
<td>EVENTS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXPANDING MARKETS (INTERNATIONAL</td>
<td>PARTNERSHIPS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FUNDRAISING</td>
<td>DEVELOPMENT</td>
<td>GRANT PROPOSAL WRITING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARKETING SERVICES</td>
<td>BRANDING</td>
<td>DESIGN</td>
<td>WRITING</td>
<td>SALES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MEMBERSHIP (RECRUITMENT</td>
<td>RETENTION</td>
<td>RENEWAL</td>
<td>REINSTATEMENT)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NONDUES REVENUE</td>
<td>SPONSORSHIPS</td>
<td>AFFINITY PROGRAMS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESEARCH (QUALITATIVE</td>
<td>QUANTITATIVE)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OPERATIONS</td>
<td>ORGANIZATION MANAGEMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXECUTIVE RECRUITMENT</td>
<td>EXECUTIVE COACHING</td>
<td>STAFF DEVELOPMENT</td>
<td>DIVERSITY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR</td>
<td>COMPENSATION</td>
<td>BENEFITS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEGAL SERVICES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROFESSIONAL DEVELOPMENT</td>
<td>CREDENTIALING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CERTIFICATION</td>
<td>TESTING (INDIVIDUALS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDUCATION</td>
<td>TRAINING</td>
<td>CE MANAGEMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROFESSIONAL SPEAKING</td>
<td>FACILITATION</td>
<td>SPEAKER DEVELOPMENT</td>
<td>INSTRUCTIONAL DESIGN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STANDARDS DEVELOPMENT</td>
<td>ACCREDITATION (PROCESSES</td>
<td>ORGANIZATIONS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TECHNOLOGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLOUD</td>
<td>NETWORK SERVICES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DATA ANALYTICS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROJECT MANAGEMENT</td>
<td>VIRTUAL CIO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STRATEGIC CONSULTING</td>
<td>DIGITAL STRATEGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SYSTEM SELECTION SERVICES (AMS, FMS, LMS, CMS, ETC.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All listings in this directory are paid listings. Information was provided by each company.
<table>
<thead>
<tr>
<th>CLA</th>
<th>CRYSTAL LAKE PARTNERS, LLC</th>
<th>CUSTOM MANAGEMENT GROUP</th>
<th>DELCOR TECHNOLOGY SOLUTIONS</th>
<th>EIREAFRACKS LLC</th>
<th>FIGHTA</th>
<th>FORESSIGHT ALLIANCE, LLC</th>
<th>FORESSIGHT FIRST LLC</th>
<th>FUSIONS</th>
<th>GIG LAW, PC</th>
<th>GLC - A MARKETING COMMUNICATIONS AGENCY</th>
<th>GRAHAM PELTON</th>
<th>HALLWRE</th>
<th>HOLMES CORPORATION</th>
<th>INDUSTRY INSIGHTS</th>
<th>MARKETING GROUP INTERNATIONAL (MGI)</th>
<th>MCI GROUP</th>
<th>MCI USA</th>
<th>MCKINLEY ADVISORS</th>
<th>MEMBERSHIPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMMUNICATIONS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PUBLIC RELATIONS</td>
<td>MEDIA RELATIONS</td>
<td>MEDIA TRAINING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PUBLISHING</td>
<td>MEDIA</td>
<td>SOCIAL MEDIA</td>
<td>DIGITAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WEB SERVICES (DEVELOPMENT</td>
<td>DESIGN)</td>
<td>CONTENT STRATEGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FINANCIAL</td>
<td>INSURANCE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACCOUNTING</td>
<td>AUDIT SERVICES</td>
<td>FINANCIAL CONSULTING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INSURANCE (LIFE, HEALTH, LIABILITY, ETC.)</td>
<td>RETIREMENT PLANS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INVESTMENT CONSULTING</td>
<td>ADVISORY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOVERNANCE</td>
<td>STRATEGY</td>
<td>FUTURES THINKING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENVIRONMENTAL SCANNING</td>
<td>SCENARIO DEVELOPMENT</td>
<td>FUTURES RESEARCH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOVERNANCE</td>
<td>BOARD DEVELOPMENT</td>
<td>STRATEGY CONSULTING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEADERSHIP DEVELOPMENT</td>
<td>ORGANIZATIONAL DEVELOPMENT</td>
<td>ETHICS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARKETING</td>
<td>MEMBERSHIP</td>
<td>MEETINGS</td>
<td>REVENUES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONFERENCES</td>
<td>PLANNING</td>
<td>LOGISTICS</td>
<td>EVENTS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXPANDING MARKETS (INTERNATIONAL</td>
<td>PARTNERSHIPS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FUNDRAISING</td>
<td>DEPARTMENT</td>
<td>GRANT PROPOSAL WRITING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARKETING SERVICES</td>
<td>BRANDING</td>
<td>DESIGN</td>
<td>WRITING</td>
<td>SALES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MEMBERSHIP (RECRUITMENT</td>
<td>RETENTION</td>
<td>RENEWAL</td>
<td>REINSTATEMENT)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NONDUES REVENUE</td>
<td>SPONSORSHIPS</td>
<td>AFFINITY PROGRAMS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESEARCH (QUALITATIVE</td>
<td>QUANTITATIVE)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OPERATIONS</td>
<td>ORGANIZATION MANAGEMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXECUTIVE RECRUITMENT</td>
<td>EXECUTIVE COACHING</td>
<td>STAFF DEVELOPMENT</td>
<td>DIVERSITY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR</td>
<td>COMPENSATION</td>
<td>BENEFITS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEGAL SERVICES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROFESSIONAL DEVELOPMENT</td>
<td>CREDENTIALING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CERTIFICATION</td>
<td>TESTING (INDIVIDUALS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDUCATION</td>
<td>TRAINING</td>
<td>CE MANAGEMENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROFESSIONAL SPEAKING</td>
<td>FACILITATION</td>
<td>SPEAKER DEVELOPMENT</td>
<td>INSTRUCTIONAL DESIGN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STANDARDS DEVELOPMENT</td>
<td>ACCREDITATION (PROCESSES</td>
<td>ORGANIZATIONS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TECHNOLOGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLOUD</td>
<td>NETWORK SERVICES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DATA ANALYTICS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROJECT MANAGEMENT</td>
<td>VIRTUAL CIO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STRATEGIC CONSULTING</td>
<td>DIGITAL STRATEGY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SYSTEM SELECTION SERVICES (AMS, FMS, LMS, CMS, ETC.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All listings in this directory are paid listings. Information was provided by each company.
<table>
<thead>
<tr>
<th>MIGHTY CITIZEN</th>
<th>MINDING YOUR BUSINESS</th>
<th>NONPROFIT HR</th>
<th>PARTNERS IN ASSOCIATION MANAGEMENT</th>
<th>RAYBOURN GROUP INTERNATIONAL</th>
<th>RESULTS TECHNOLOGY INC. / BLANKEN consulting</th>
<th>SMITHBUCKIN</th>
<th>STERLING MARTIN ASSOCIATES</th>
<th>SUNTRUST BANK - INSTITUTIONAL INVESTMENTS</th>
<th>TALLEY MANAGEMENT GROUP INC.</th>
<th>THE LEADERS’ HAVEN</th>
<th>THE LEARNING STUDIO, INC.</th>
<th>TVD ASSOCIATES, INC.</th>
<th>WILLOW MARKETING</th>
<th>XCENTIUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMUNICATIONS</td>
<td>PUBLIC RELATIONS</td>
<td>MEDIA RELATIONS</td>
<td>MEDIA TRAINING</td>
<td>PUBLISHING</td>
<td>MEDIA</td>
<td>SOCIAL MEDIA</td>
<td>DIGITAL</td>
<td>WEB SERVICES (DEVELOPMENT</td>
<td>DESIGN</td>
<td>CONTENT STRATEGY</td>
<td>FINANCIAL</td>
<td>INSURANCE</td>
<td>ACCOUNTING</td>
<td>AUDIT SERVICES</td>
</tr>
</tbody>
</table>

All listings in this directory are paid listings. Information was provided by each company.
2040 Digital LLC
6701 Democracy Blvd.
Bethesda, MD 20817
Kevin Novak, CEO
240-292-9311
contact@2040digital.com
www.2040digital.com
2040 Digital is a full-service strategic solutions firm that helps you navigate today’s complex, constantly-evolving digital business environment. We are specialists in not-for-profits, B2B publishers, B2C publishers, associations, government, and businesses in general. Everything we do is geared to transforming your organization and fulfilling its potential in a dynamic and ever increasingly digital world. We work with you to build a relevant narrative that singles you out in your market and target market sectors.

Achurch Consulting
11519 Tavernay Pkwy.
Charlotte, NC 28262
Julie Davis, Director of Marketing
703-304-9994
info@achurchconsulting.com
www.achurchconsulting.com
Achurch Consulting specializes in helping organizations implement their business and technical strategies through Virtual Workforce Consulting. Platform Implementations and Adoption, Virtual Event Program and Project Consulting, and/or Fractional CIO Services. We bring together systems, technology, processes, and most importantly, the people who make your organization successful.

Allegiance Fundraising Group
200 International Dr., #130
Portsmouth, NH 03801
Ben Lamson, VP of Sales
844-888-7654
sales@allegiancefundraising.com
www.allegiancefundraising.com
Our strategic consulting and turnkey loyalty programs are proven to increase renewal response by rewarding members with high-quality benefits tailored to your association. Our MemberCard program and innovative mobile app benefits platform will inspire your members to renew annually to continue saving year after year.

AltaI Systems AMS Solution
209 West St., #201
Annapolis, MD 21401
Mike Frye, Partner
888-631-8992
sales@altaisystems.com
www.altaisystems.com
Our association management solution goes beyond traditional business software by providing a full business platform built within Microsoft Dynamics. All of AltaI’s association-based functionality resides inside the platform solution to provide virtually unlimited access to cutting-edge Microsoft technology like Power BI, artificial intelligence, customer journeys, and automated workflows that will satisfy requirements today and well into the future.

Amped Association Management
1818 Parmenter St., #300
Middleton, WI 53562
Lynda J. Patterson, FASAE, CAE, President and Owner
608-251-5940; Fax: 608-492-0523
lpatterson@manageassociations.com
www.manageassociations.com
AMPED partners with your organization to bring you creative, forward-thinking solutions during busy times, staff retirements, or transitions. We are leaders in full-service management and integrated solutions that blend our operations with your existing staff, live and virtual learning, consulting services, and strategic planning. We embrace change! Put us to work for you. See our ad on this page.

Alordon LLC
111 Rockville Pike, #600
Rockville, MD 20850
Greg Plotts, Partner—Nonprofit and Association Industry Group
301-231-6200; Fax: 301-231-7630
gplotts@aronsonllc.com
www.aronsonllc.com
Alordon LLC provides comprehensive assurance, tax, and consulting solutions tailored to your nonprofit’s financial, operational, and compliance needs. We are committed to working with your nonprofit leaders and board members to provide support on areas critical to your long-term success.

Artisan E-Learning
1015 Atlantic Blvd., #279
Atlantic Beach, FL 32233-3313
Amy Morrissey, President
904-800-9395
info@artisanelearning.com
www.artisanelearning.com
Artisan E-Learning has been developing custom e-learning since 2004. We help our clients provide effective, engaging online training to their employees, volunteers, and members. Our specialty is making e-learning easy for our clients. Our team guides you through our proven process from start to finish resulting in e-learning that sticks. See our ad on page 15.

Association Development Solutions (ADS)
150 N. Michigan Ave., #800
Chicago, IL 60601
Tyler Eble, Vice President
312-235-6658; Fax: 312-278-0810
tebie@adsfundraising.com
www.adsfundraising.com
Our comprehensive suite of fundraising services is specifically designed around the unique needs of associations, blending modern strategies with traditional methodology to help you achieve your nondues revenue goals. We provide personalized solutions and hands-on support for any stage of your fundraising program, from initial consultation and planning to implementation.

Association Executives Group, LLC
7044 S. 13th St.
Oak Creek, WI 53154
Denise Harris, President/CEO
414-908-4911; Fax: 414-768-8011
dharris@associationeg.com
www.associationeg.com
For more than 30 years, Association Executives Group (AEG) has provided full-service solutions and outsourced services for associations, societies, foundations, and trade organizations. AEG’s team is positioned to provide a customized approach that fits your organizational needs. In addition to full-service management, rely on AEG for conference and event manage-
ment, membership development, website design and development, technology solutions, finance, and more. AEG’s nationally published writers, award-winning designers, and experienced onsite IT team are ready to assist you.

ASSOCIATION HEADQUARTERS, INC.
1120 Rt. 73, #200
Mt. Laurel, NJ 08054
Nick Spencer, Director of Sales
856-380-6870; Fax: 856-439-0525
nspencer@ahint.com
www.associationheadquarters.com
AH is a professional services firm offering full-service, hybrid, and project solutions to more than 40 nonprofit organizations. We focus on custom solutions, such as strategic planning, technology assessments, website builds, database integrations, accounting, recruitment, and nondues revenue growth. Our meetings and events and marketing teams help your organization achieve greatness.

ASSOCIATION MANAGEMENT CENTER
8735 W. Higgins Rd., #300
Chicago, IL 60631
Mike Norbut, Vice President of Business Development
847-375-4700; Fax: 847-375-6401
info@connect2amc.com
www.connect2amc.com
Founded on the principles of customer intimacy and mission-driven leadership, Association Management Center is passionate about and committed to furthering our clients’ causes. A trusted partner since 1974, AMC provides full-service management and consulting services to leading national and international organizations, helping them reach goals and achieve what they believe. See our ad on page 16.

ASSOCIATION METRICS, INC.
P.O. Box 16091
Oklahoma City, OK 73113
Larry Seibert, President
317-840-2303
info@associationmetrics.com
www.associationmetrics.com
Association Metrics is the thought leader in voice-of-the-member research. Our research analyses, designed exclusively for associations, take the guesswork out of strategic and tactical planning, which leads to higher retention and increased nondues revenue. Our analytic services measure member loyalty/engagement and assess member benefits, publications, meetings, education, and advocacy.

ASSOCIATION STRATEGIES, INC.
P.O. Box 25131
Alexandria, VA 22313
Pamela Kaul, President
703-683-0580
connect@assnstrategies.com
www.assnstrategies.com
Association Strategies, Inc., is an executive-search and transition-management firm dedicated to recruiting top-notch talent in trade associations, professional societies, foundations, and nonprofit organizations. For over 30 years, our award-winning team has successfully guided a wide range of organizations through the critical process of succession, selection, and integration of new leaders.

To-Do List

☐ Engage members with cutting-edge e-learning courses

☐ Be the go-to resource for professional development in my industry

☐ Help my members grow professionally

☐ Build a partnership with an e-learning content developer that makes me look good!

Let us help craft your perfect solution.

Artisan E-Learning
Custom E-Learning Development
www.artisanelearning.com | 904.800.9395 | info@artisanelearning.com
ASSOCIATIONS REWIRED
6338 Villa Ln.
Falls Church, VA 22044
David Schulman, President
703-406-9554
info@associationsrewired.com
www.associationsrewired.com
Was your association ready for the wholesale shift to digital? It’s not just about the tools; it’s how they reveal your members’ needs. We develop and implement digital strategies designed to play a more dynamic role for the next generation of membership, and to identify and create new revenue streams.

BEYOND DEFINITION
8505 Fenton St., #212
Silver Spring, MD 20910
Debbie Bates-Schrott, Founder and CEO
301-595-8844 x101; Fax: 301-495-8877
hello@beyond-definition.com
www.beyond-definition.com
Beyond Definition exists to create the unexpected. We are a team of strategists and creatives focused on pushing the boundaries of what’s possible and delivering more for our clients. From discovery and diagnostics, to strategy development, to multichannel implementation, we help associations, foundations, and more to move their missions forward.

BEACONFIRE RED, A DIVISION OF ALLEGIANCE FUNDRAISING GROUP
2300 Clarendon Blvd., #925
Arlington, VA 22201
Ben Lamson, VP of Sales
844-858-7654
sales@allegiancefundraising.com
beaconfire-red.com
Beaconfire RED works exclusively with nonprofits, associations, and social enterprises to transform and grow their brands to have greater impact. Our vision is that every nonprofit, association, and social enterprise will be empowered by digital strategies and technologies to make real and positive change in the world.

BLOCH & REED ASSOCIATION ADVISORS
7132 Dornough Ln.
Bradenton, FL 34202
Ralph Bloch, Principal
941-306-5222
info@blochreed.com
www.blochreed.com
Strategy planning: We’ll help align your organization’s strategy and culture. Governance: We help transform board members from micromanagers into insightful leaders. Issues with your association management company? We excel at assessing or resolving difficult situations, and, when appropriate, conducting AMC searches. Looking for a CEO? We’ll manage the recruitment process for you.

BOLDR STRATEGIC CONSULTING
2926 Mainstone Dr.
Fairfax, VA 22031
Tracy Betts, CEO
703-451-8675
info@boldrstrategy.com
www.boldrstrategy.com
Our proprietary approach to digital transformation helps associations uncover and understand customer needs and tie those needs back to the technology that serves them. We facilitate expansive thinking that results in easy-to-implement, future-forward technology roadmaps. Discover new revenue streams. Reimagine how you support members. Humanize your systems.

Strategic Event Planning for a Virtual World
Stay connected with your members and volunteers with a hybrid/virtual event. AMC offers a full suite of customized support for your next
• conference
• board meeting
• governance session
Learn more at connect2amc.com/events

AMC Consulting Services: Strategic Event Management • Content Strategy • Marketing
BOSTROM
CONSULTING
35 East Wacker Dr., #850
Chicago, IL 60601
Dede Gish-Panjada, VP, Consulting
312-596-4247; Fax: 312-644-8557
solutions@bostrom.com
www.bostrom.com
Bostrom specializes in consulting to global societies, trade groups, and not-for-profits from offices in Chicago and DC. Bostrom has a proven track record helping organizations identify, create, and realize value for members and customers through our great people, experience in association management, and an agile approach to personalized solutions. See our ad on this page.

CIMATRI
400 Oronoco St.
Alexandria, VA 22314
Rick Bawcum, CEO / Founder
571-249-2719
info@cimatri.com
www.cimatri.com
CIMATRI is a digital strategy consulting firm focused exclusively on associations and nonprofits. Our consultants average 20-plus years leading successful technology transformation, including real-world association experience. Our practice areas include technology assessments, strategic planning, and vCIO engagements. The CIMATRI team will help you meet the challenges of a changing world. See our ad on page 18.

CLA
901 North Glebe Rd., #200
Arlington, VA 22203
Nat Bartholomew, CPA, Principal in Charge
703-825-2168
nat.bartholomew@claconnect.com
www.claconnect.com
CLA’s consulting services provide the clarity and direction necessary to become more efficient, effective, and sustainable, while enhancing your member value proposition, member engagement, and ultimately ensuring your relevance. No surprises for management; no surprises in the boardroom. Just ask our 2,000-plus association clients (consulting, audit, tax, outsourcing, wealth advisory).

CRYSTAL LAKE
PARTNERS, LLC
494 N. Owen St.
Alexandria, VA 22304
Kristine Metter, MS, CAE, President
703-405-7727
kmetter@crystallakepartners.com
www.crystallakepartners.com
In today’s unsettled environment, it’s critical to hire consultants who really know association management. Turn to Crystal Lake Partners to help you envision new operating models or provide interim support. With deep experience in revenue generation, member experience, and events, we can help you develop short- and long-term strategies that assure organizational health and exceptional member service.

Discover. Diagnose. Deliver.
Looking for big picture, proactive solutions to help propel your association into the future? Bostrom Consulting offers a wide range of a la carte consulting services led by a team of innovative thought leaders. We are driven by our passion for helping associations achieve maximum success.

The end of our engagement is the beginning of your next chapter!
Delivering Strategic Digital Solutions for Associations

Let’s Discuss Your Digital Needs

Assessment
- Technology Assessment
- Security & Compliance
- Application Evaluation
- Data Governance

Strategy
- Technology Roadmap
- Business Continuity
- Business IT Alignment
- Program Management

Virtual Talent
- Technology Leadership
- Project Management
- Innovation Coach
- Website Transformation

Research
- Benchmarks
- Best Practices
- Tools and Templates
- Data-Driven Frameworks

571-249-2719 | www.CIMATRI.com | info@CIMATRI.com
CUSTOM MANAGEMENT GROUP
154 Hansen Rd., #201
Charlottesville, VA 22911
Allison Travis, Principal
434-971-4788; Fax: 434-977-1856
cmg@custommanagement.com
www.custommanagement.com
CMG is a full-service association management company (AMC) providing management services for local, national, and international membership societies, associations, foundations, social organizations, and consortia. With proven experience in building membership, conducting large conferences in the U.S. and internationally, managing financial assets, and developing online and print communications, CMG can help your association achieve its goals. Our services are not “one size fits all,” but are tailored to the individual needs of each client.

DELCOR TECHNOLOGY SOLUTIONS
8380 Colesville Rd., #550
Silver Spring, MD 20910
Pete Leinbach, Director of Marketing
301-585-4222
info@delcor.com
www.delcor.com
Since our founding in 1984, hundreds of association and nonprofit organizations worldwide have turned to DelCor as a strategic partner. We offer our clients a unique blend of cutting-edge IT knowledge and extensive experience serving the association and nonprofit community. See our ads on this page and the inside back cover.

EUREKAFACTS LLC
51 Monroe St., #PE 10
Rockville, MD 20850
Jorge Restrepo, CEO
240-403-4800
info@eurekafacts.com
https://www.eurekafacts.com
EurekaFacts delivers smart research solutions for missions that matter. Since 2003, we have collaborated with association leaders to shape successful programs, communications, and member strategy through data collection and advanced analytics. We provide actionable insights for your most vexing questions. Headquartered in the Washington, DC, area, EurekaFacts is ISO 20252-certified to the highest-quality standard in market and social research.

FÍONTA
1150 18th St., NW, #200
Washington, DC 20036
Lisa Rau, Founder, Chief Growth Officer
202-296-4065
info@fionta.com
www.fionta.com
Headquartered in Washington, DC, Fíonta has provided services to over 1,000 associations and nonprofits. A Salesforce.org Premium Partner, Fíonta has expertise migrating associations to Salesforce, as well as implementing and extending Fonteva, an AMS built on Salesforce. Staff are certified in Nonprofit Cloud, Community Cloud, Pardot, Marketing Cloud, and more.

FORESIGHT ALLIANCE, LLC
1424 F St., NE
Washington, DC 20002
Christopher Kent, Partner/Futurist
202-525-7193
hello@foresightalliance.com
www.foresightalliance.com
Foresight Alliance is a rigorous, creative, futures-oriented consulting company. We help our clients understand how the future might unfold and what they need to do now to anticipate and shape it. Our methodologies deliver potent new organizational opportunities, more robust strategies, and wiser decisions. We excel at making information about the future relevant to our clients.

Need Some IT Clarity?
The DelCorians Can Help

Partnering with associations and nonprofits to bring technology into alignment with your mission. How mature is your IT?
come to us because they know we have the skill and will to lead them to launch and support them for the long term. fusionSpan is a Salesforce Silver Partner and also partners with many other industry leaders to support our clients’ needs. We are a growing, 80-person company headquartered in Rockville, MD.

GK Law, P.C.
1055 Thomas Jefferson St., NW, #500 Washington, DC 20007
Richard B. Bar, Association Practice Group Leader
Katharine F. Meyer, Principal
202-342-5200; Fax: 202-342-5219
info@gklaw.com
www.gklaw.com

GK Law, P.C. has more than 125 years of combined experience representing trade, professional, and tax-exempt organizations. We handle issues involving corporate governance, antitrust, tax, contracts, employment, regulatory matters, credentialing, intellectual property, COVID-19, and more. Our attorneys successfully and passionately promote and protect the interests of clients and their members.

GLC - A MARKETING COMMUNICATIONS AGENCY
9855 Woods Dr., #105 Skokie, IL 60077
Joe Stella, VP, Business Development
847-205-3127; Fax: 847-564-8197
info@glcdelivers.com
www.glcdelivers.com

GLC helps associations engage their members with content marketing strategies and award-winning graphic design, websites, magazines, and journals. GLC also delivers on-demand marketing and communications services and drives virtual event revenue with virtual exhibit solutions.

GRAHAM-PELTON
5 Penn Plaza, 23rd Fl.
New York, NY 10001
Elizabeth Zeigler, President and CEO
800-608-7955
inside@grahampelton.com
www.grahampelton.com

Graham-Pelton is a leading fundraising consulting firm with offices around the globe and is the trusted advisor and partner to leading impact-driven institutions across all sectors of the nonprofit world. The firm customizes fundraising services to the needs of the client and the institution’s culture, providing campaign management, planning studies, board training and development, major gift counsel, interim staffing, and other uniquely tailored services. Graham-Pelton’s mission is clear: Elevate philanthropy so nonprofits flourish.

HALMYRE
350 - 1 First Canadian Pl.
Toronto, Ontario M2J 1E7
Christine Saunders, President
866-425-6973
hello@halmyre.com
www.halmyre.com

Do you need growth? Get what you need to grow in the short- and long-term: Unique value propositions, brand strategies, pricing strategies, and customer experience. We are marketing consultants who advise on the best investment of your limited resources to grow. Let us help.

See our ad on page 6.

HOLMES CORPORATION
2975 Lone Oak Dr., #180 Eagan, MN 55121-1553
Diane Taylor, SVP Strategic Partnerships
651-905-2600; Fax: 651-905-2669
info@holmescorp.com
www.holmescorp.com

Take your certification and training to the next level with Holmes Corporation. For 50 years, we have partnered with leading industry associations to expand their credentials through the design, promotion, and global distribution of premium-quality learning systems.

INDUSTRY INSIGHTS
6235 Emerald Pkwy.
Dublin, OH 43016
Greg Manns, CPA, Sr. Vice President
614-389-2100 x108; Fax: 614-389-3816
info@industryinsights.com
www.industryinsights.com

Trusted, responsive experts specializing in high-quality survey research for associations since 1980. We are a group of data scientists, CPAs, and IT professionals who are passionate about conducting survey-based research to fulfill the informational needs of associations and their members. Our results help associations and their members succeed.

See our ad on this page.

MARKETING GENERAL INCORPORATED (MGI)
625 N. Washington St., #450 Alexandria, VA 22314
Rick Whelan, President
703-706-0350; Fax: 703-549-6057
info@mgimedia.com
www.marketinggeneral.com

Marketing General Incorporated is North America’s most experienced association marketing agency. MGI is celebrating its 41st year as a full-service strategic partner that designs and implements programs that grow membership numbers, dues, and nondues revenue. Widely used by the entire membership profession, MGI’s Membership Marketing Benchmarking Report is now in its 12th year.

See our ad on the back cover.
Matrix Group is a leading digital marketing and consulting agency in the Washington, DC, area specializing in web design, development, AMS, virtual meeting platform, integration, branding, mobile, and e-marketing services. Clients hire us to solve these challenges: Increase members or stem membership decline; increase member/customer retention with a compelling set of web, mobile, social, and AMS offerings; reach new audiences with a clear brand; and increase staff productivity by integrating various backoffice systems.

MCI Group/MCI USA
7918 Jones Branch Dr., #300
McLean, VA 22102
Amy Lestition Burke, CAE, Senior Vice President, Association Solutions
703-506-3260; Fax: 703-506-3266
associationsolutions@mci-group.com
www.mci-group.com/usa
MCI works with our association partners to inspire possibilities, ensure relevance, and maximize growth. For more than 30 years, MCI has offered practical, innovative solutions in key performance areas. From increasing member and customer engagement to growing attendee and sponsorship revenues, we help your association adapt for what’s next. See our ad on this page.

Mckinley Advisors
1227 25th St., NW
Washington, DC 20037
Jay Younger, FASAE, President & CEO
202-233-6250
jyounger@mckinley-advisors.com
www.mckinley-advisors.com
As a flexible and highly collaborative partner, McKinley Advisors translates complex challenges into clear and actionable direction. We are a leading association consulting firm that has partnered with hundreds of diverse organizations. Our team’s capabilities in strategy, research, analytics, and marketing services produce extraordinary insights to empower clients’ missions.

MemberClicks provides all the tools member-based organizations need to thrive under one roof. See our ad on the inside front cover.

Mighty Citizen
2400 Weberville Rd., Bld. B
Austin, TX 78702
Nicole Araujo, CAE, Client Engagement Director
512-960-8085
naraujo@mightycitizen.com
www.mightycitizen.com
Driven by data and a belief in human-centered design, Mighty Citizen produces measurable results. As an award-winning, full-service agency, we offer user research, strategy, messaging, branding, design, marketing campaigns, content, fundraising, website design/development, and more. We challenge clients to think deeply and apply the right technology to achieve results.

Minding Your Business
605 North Michigan Ave., 4th Fl.
Chicago, IL 60611
John Folks, President
312-870-7102
john.folks@myb.net
www.myb.net
We help associations grow. Through our data-driven approach to organizational transformation, strategic planning, program assessment, and value creation, we translate research into business intelligence so leaders can make better decisions and with more confidence. Call us if you need help delivering more impact and boosting your bottom line.

Nclud
1342 Florida Ave NW
Washington, DC 20009
Kerry Gunther, Director, Association Solutions
202-684-8984
hello@nclud.com
www.nclud.com
Since 1998, we have designed and developed more than 100 websites for trade and professional associations. We provide a customized solution for each association that we work with and understand the unique challenges that member-based associations face—from association management system integration to nondues revenue generation.
ing your association for a digital future, we support implementation of your important projects and initiatives. .orgSource’s experienced advisors are here to help.

**PARTNERS IN ASSOCIATION MANAGEMENT**
325 John Knox Rd., #L103
Tallahassee, FL 32303
John Ricco, CAE, Vice President
866-587-7620; Fax: 850-222-3019
info@yoursearchisdone.com
www.yoursearchisdone.com

Partners Strategic Solutions is the consulting division of Partners in Association Management. Our firm has worked with organizations with budgets on governance, strategic planning, and business analysis at the state, regional, and national level.

**RAYBOURN GROUP INTERNATIONAL**
3502 Woodview Trace, #300
Indianapolis, IN 46286
Leslie Murphy, FASAE, CAE, President
800-362-2546
info@raybourn.com
www.raybourn.com

RGI specializes in helping associations understand the needs of their stakeholders, including the value, benefits, and services they seek. Our results-oriented consulting services are designed to provide your organization with a customized, detailed, and actionable plan that ensures a thriving, healthy association for years to come.

**RESULTS TECHNOLOGY INC. / BLANKEN CONSULTING**
5705 Mahogany Cir., #108
Gaithersburg, MD 20878
Rhea Levinson Blanken, FASAE, Founder & Chief
301-407-1357
rheaz@resultstech.com
www.resultstech.com

Rhea Blanken builds partnerships with her clients to illuminate, expose, and expand their capacity for creativity in delivering meaningful outcomes—able to surpass their belief for what’s possible. She’s a gifted coach, a creativity guru, and curious co-explorer with her clients. Rhea would be honored to support your commitments.

**SMITHBUCKLIN**
330 N. Wabash Ave.
Chicago, IL 60611
Katie Callahan-Giobbi, Head of Business Development
800-539-9740
solutions@smithbucklin.com
www.smithbucklin.com

SmithBucklin is the association management and services company more organizations turn to than any other. We apply extensive experience, knowledge, and leading practices to help volunteer-governed organizations optimize their performance and enable a future of relevancy and innovation. Our mission is to achieve the missions of the client organizations we serve.

**STERLING MARTIN ASSOCIATES**
1025 Connecticut Ave., NW, #1000
Washington, DC 20036
David Martin, CEO and Managing Partner
202-327-5485
info@smartinsearch.com
www.smartinsearch.com

Sterling Martin Associates is a national executive search firm that specializes in finding talented CEOs, executive directors, and other senior staff for the nation’s associations and nonprofit organizations. Since 2006, Sterling Martin Associates has built a track record of success in placing top leaders for our client organizations.

---

**NONPROFIT HR**
1441 L St., NW 12th Fl
Washington, DC 22202
Patty Hampton, Vice President & Managing Partner
202-785-2060
info@nonprofithr.com
www.nonprofithr.com

Nonprofit HR focuses exclusively on the talent management needs of social sector organizations. We focus on project-based HR strategic and advisory services, HR outsourcing, talent acquisition, DEI, and search. Nonprofit HR also offers customized trainings, research, and events, all to strengthen the people management capacity of the social impact workforce.

**.ORGSOURCE**
2033 N. Milwaukee Rd.
Riverwoods, IL 60015
Sherry Budziak, Founder and CEO
847-275-1840
sherry@orgsource.com
www.orgsource.com

.orgSource works directly with association leadership teams, providing strategies and data-driven solutions that reflect our deep understanding of association challenges and approaches for overcoming them. Our success spans 15 years and represents more than 200 client engagements. From developing an integrated strategic plan to preparing your association for a digital future, we support implementation of your important projects and initiatives. .orgSource’s experienced advisors are here to help.

**Groundbreaking research — just for associations.**

Willow Marketing is a full-service marketing agency specializing in association work for three decades. Our experience and unique approach allows us to tell association stories that are timely and relevant, increase stakeholder engagement, and create meaningful brand experiences. We know research is key to understanding your members’ perceptions, and shaping your brand, website, and member communications — that’s why we’re here to share our insights with you.

Willow Marketing is a full-service marketing agency specializing in association work for three decades. Our experience and unique approach allows us to tell association stories that are timely and relevant, increase stakeholder engagement, and create meaningful brand experiences. We know research is key to understanding your members’ perceptions, and shaping your brand, website, and member communications — that’s why we’re here to share our insights with you.

Explore Willow Marketing’s association attitudinal survey findings:
willowmarketing.com/associations-survey-results/
SUNTRUST BANK - INSTITUTIONAL INVESTMENTS
1445 New York Ave., NW, #300
Washington, DC 20005
Jerrol Charles, Director, Client Development
202-879-6445
jerrol.charles@suntrust.com
SunTrust has more than 100 years of experience serving the evolving and increasingly complex needs of nonprofit organizations. Our team understands the unique characteristics of associations and can craft a tailored investment program for your organization. We provide investment and administrative solutions to help you achieve meaningful and measurable results.

TALLEY MANAGEMENT GROUP, INC.
19 Mantua Rd.
Mount Royal, NJ 08061
Joseph Sapp, MBA, CAE, Chief Operating Officer
856-423-7222
talley@talley.com
www.talley.com
With over 30 years of experience in the association management industry, Talley Management Group, Inc., provides full-service association management, in-person and virtual meeting management, and consulting services to over 26 organizations. Its global experience and local connections have allowed TMG to develop partnerships, expanding the AMC model internationally. See our ad on page 10.

THE EUBANK & BERRY GROUP AT MORGAN STANLEY
1747 Pennsylvania Ave., NW, #900
Washington, DC 20006
Ted Berry, Vice President, Financial Advisor
202-778-1588; Fax: 202-778-1270
edward.a.berry@morganstanley.com
https://advisor.morganstanley.com/eubank-and-berry-group
The Eubank & Berry Group at Morgan Stanley helps individuals, their families, small businesses, and nonprofit organizations fulfill their respective missions by aligning their financial resources, obligations, and values.

THE LEADERS’ HAVEN
4086 Country Overlook Dr.
Fort Mill, SC 29715
Cynthia Mills, CMC, CPC, CCRC, FASAE, CAE, President & CEO
704-604-3005
cynthiamills@theleadershaven.com
www.theleadershaven.com
The Leaders’ Haven customizes virtual and in-person facilitation of strategic frameworks, board governance, leadership development, and executive coaching. Through an evolutionary experience, leaders and teams go beyond business as usual and fulfill their true calling, so they can continuously transform to exceed the expectations of the people they serve.

Need Digital Strategy Results?
XCentium delivers heroic member engagement and ROI. Our expertise includes:

- Digital Experience Platforms
- Personalization & A/B Testing
- Customer Journeys
- Marketing Automation
- Content Management
- Commerce for Associations
- Digital Asset Management
- AI Based Search
- Data Driven Insights
- Cloud Migration
- Integrations with MMS and LMS

For more information: xcentium.com/asae
THE LEARNING STUDIO, INC.
116 E. Knighton Pl.
Elmhurst, IL 60126
Debra Zabloudil, President
630-936-3068
info@learningstudio.biz
www.learningstudio.biz

The Learning Studio is “all things” association education. With deep knowledge and expertise in adult learning, and a business sense in how to assure the education engine is contributing to the organization overall, we are the experts you need at your side. We specialize in education and content strategy work, instructional design, facilitating workshops for members and staff on an array of leadership issues, and keynote presentations. There has never been a more important time to develop a strategy to fuel your educational portfolio into 2021 and beyond.

TVD ASSOCIATES, INC.
405 N. Stanwick Rd.
Moorestown, NJ 08057
Todd Von Deak, President
888-859-8832
info@tvdassociates.com
www.tvdassociates.com

TVD Associates (TVDA) brings tested approaches to unique challenges. Our focus areas include strategic plan development, the creation of membership, as well as marketing strategies, board development, and managing events of all sizes. Reach out and let TVDA put decades of experience to work for your organization.

WILLOW MARKETING
3590 N. Meridian St., #200
Indianapolis, IN 46208
Brad Gillum, CEO/President
317-257-5225
info@willowmarketing.com
www.willowmarketing.com

Willow Marketing is a full-service marketing and communications agency helping associations nationwide tell their stories, connect with stakeholders, and create better member experiences. With three decades of experience working with associations, we understand your industry—and our research is leading the way. Explore our association attitudinal survey findings: https://willowmarketing.com/associations-survey-results/

See our ad on page 22.
Innovative?

Take the self-assessment at DelCor.com.

Our consulting services:

• Technology Management
• Managed Services (MSP)
• Assessments & System Selection
• Digital Workplace
• Cloud Services & Cybersecurity
• CIO-as-a-Service
• Virtual Events Tech Strategy
Marketing is an essential function for a thriving association. For over 40 years, professional and trade associations have turned to Marketing General Incorporated (MGI) for successful marketing solutions.

You want long-term and profitable relationships with your members, customers, and prospects. MGI supports your efforts with best practices marketing tools, including data analytics, research, social media, telemarketing, and digital advertising.

Let MGI help to grow the effectiveness of your marketing efforts. For a no-obligation consultation, contact MGI at info@MarketingGeneral.com.