



ANNUAL CONFERENCE DISRUPTION: LESSONS LEARNED FROM THE 2020 PANDEMIC

By Kristine Metter, MS, CAE | April 2020

The COVID-19 pandemic has touched the association community in extraordinary ways, and we as a community are rallying together to share resources and help each other through these trying times. In support of this effort and to capture lessons learned while they are still fresh, Crystal Lake Partners interviewed three association executives whose associations typically hold their annual meeting in March or April. In each case, the in-person event was canceled and at least some portion was converted to a virtual format.

We know everyone is busy and bombarded with information, so we are offering key insights in a bulleted format that we hope helps you get to the “aha” items quickly.

Many thanks to the following individuals for sharing their experiences.

- Shawn Boynes, FASAE, CAE, executive director, American Association for Anatomy
- Tom Menighan, BPharm, MBA, ScD(hon), executive vice president and CEO, American Pharmacists Association
- Chris Urena, MBA, CAE, chief learning officer, Endocrine Society

See page 4 for a snapshot of each association.

DATA IN – COMMUNICATION OUT

Two cornerstones of making critical decisions are data and communications. We asked these association executives about data sources and metrics that informed their decisions. We also discussed how they communicated throughout the process.

Information and Metrics

- Everyone became news junkies and monitored key agencies such as the World Health Organization, Centers for Disease Control, and international/state/local governments.
- Quantifiable data was important. Two examples are:
 - A trackable downturn in registrations and hotel room bookings coupled with an escalation of cancellations and inquiries.
 - Data from recent surveys on participants’ interest in a virtual meeting.
- The cancellation of other association meetings served as trigger points and a sign that immediate action was needed to stay in front of the developing situation.
- The network of association executives and functional peers proved to be useful sources of information and counsel.

“We are blessed with a team of professionals who are well networked with their peers in other associations, so we’re all about understanding best practices and trying to be an exemplary organization.”

– Tom Menighan, American Pharmacists Association

External Communication

- It was important to manage the timing and content of external communications through official channels.
- They communicated early and often, using all available channels such as website, social media, and blast email. A vacuum of information led to people creating their own narratives.
- Messaging didn’t have to be perfect. Just get something out the door.
- As long as there was regular communication, most people understood that information was changing rapidly.
- Member leaders were often sought out by their own networks and asked to comment.
- A single voice to all vendors and contractors assured a common understanding of the current status.

PEOPLE

The success or failure of critical decisions often stems from the people involved. This section looks at who was on the decision team and how the human factor impacted their decision making.

The Decision Team

- These associations often relied on existing senior staff leadership teams as well as key dyads, such as the finance and meetings teams working together.
- The board was universally involved, but there was variation between working with the full board or a subset (e.g., the chair, chair-elect, past-chair). In other instances, program committees or other similar groups responsible for the meeting were involved.
- While vendor, contractor, hotel, and convention center staff were consulted and served key informant roles, they were not typically part of the staff-member decision team.
- The ability to be nimble and responsive was key. In some cases, too many people were involved and that hindered coming to unity on a final decision.

The Human Factor

- Staff and volunteers needed to work through several phases from shock to acceptance at their own pace. One executive likened it to the Kubler-Ross Seven Stages of Dying.
- At times, individuals became overwhelmed by the situation and lost track of the fundamentals of making a good decision.
- People were reluctant to let go of the original meeting that they had built.

“A contingency plan is only as good as your willingness to act on it. Emotion and uncertainty can take over.”
– Shawn Boynes, American Association for Anatomy

THE DECISION

In the heat of the moment, these executives faced a mountain of challenges. Here they share the most critical challenges they faced, what they felt they got right, and what they would do differently.

Challenges in Making the Decision

- A compressed time frame and limited or scattered data compounded the decision process.
- Pulling all the information into a final go or no-go decision was difficult. It proved helpful to have a firm date by which a decision had to be made. This allowed prioritization of activities.
- Program owners sometimes struggled with setting aside the original meeting design to create something new. Leaders had to push folks to come on board.
- Trying to simultaneously lead and keep up with the volume of information was tough.

What Worked

- Open and transparent communication with staff and elected leaders.
- Clarity about where they were going.
- The decision to cancel was made as early as possible. People were grateful for having advance notice so they could adapt their plans as needed.
- The virtual experience design took into account the personal and professional needs of participants.
- A focus on accessibility through free or low-cost registration fees for the virtual offering and opening the new event to a broad audience of members and nonmembers.

What They Would Do Differently

- To fully understand the association’s range of exposure, get a better sense from hotel partners and the convention center the best- and worst-case scenarios they are facing.
- Open lines of negotiation with vendors earlier.
- Have a better contingency plan.
- Make the decision sooner.

THE VIRTUAL EVENT

These associations paid close attention to what the alternate program is and is not. They knew that they were not simply putting the conference online. They also recognized that while education is a cornerstone of an annual meeting, there are so many other elements. They took specific steps to address the community, celebration, and feeling of the meeting. [Note: this paper intentionally does not discuss sponsor, exhibitor or other corporate relations activities.]

Educational Content

- Because the full program would not be offered as originally designed, staff and volunteers had to decide what to do with all the content: move to virtual this year, move to next year's in-person meeting, offer as a future webinar, publish the abstracts, or other.
- Virtual education will be provided through both on-demand and live sessions over a defined period of time.
- Some staff did not want to trim down the program as they thought it would be a disservice to those not selected. The virtual offerings have been carefully curated into a sampling of the original program that seemed relevant for the current environment.
- All the associations paid close attention to member needs for continuing education units and publication requirements.
- They worked in advance to manage expectations for the new program and once it was locked down, they had to respond to requests for additions.

“Our annual meeting has strong, recognizable, and longstanding brand equity. The new online conference is not a replacement, but rather a new—complementary—offering.”
— Chris Urena, Endocrine Society

Community and Celebration

- Careful consideration was given to bringing forward the networking, camaraderie, celebration, and positive feel of the original meeting.
- These associations looked for opportunities to record speeches by award winners and volunteer leaders. Presenters have been encouraged to shorten their speeches to make them more accessible online.
- One association engaged its committees to host “Twitter Chats” that were held outside of regular work hours to recreate a sense of community and connection.
- One association created a look back video of the 2018 and 2019 annual meetings to capture the energy of the live meetings and surface fond memories.

LOOKING FORWARD

With the benefit of being a couple of weeks past the whirlwind period of deciding to cancel their live event, these executives were able to offer recommendations for the future and share a few key thoughts they thought would be valuable to their colleagues across the association community.

Thinking About the Future

- There is consensus that in-person meetings will be different going forward.
- Next year's meetings will likely be smaller, so consider renegotiating hotel contracts.
- What we are learning about virtual meetings now will help future meetings be more accessible.
- A virtual option should always be part of future contingency plans.

Key Words of Wisdom

- Be open, transparent, and stay connected.
- Be a partner and give people a reason to trust you.
- This is not new. Add lessons learned from this experience to those we learned after 9-11 and the 2009 recession.
- Survey regularly so you have relevant data on hand in the moment.
- Stretch yourself in designing the new program, but don't over complicate it.
- Do what is right for your organization. Don't blindly mimic other groups.
- And most importantly, things change whether you want them to or not.

ASSOCIATION SNAPSHOTS

American Pharmacists Association

Tom Menighan, BPharm, MBA, ScD (hon)
Executive Vice President and CEO

Type of association: 501(c)6, Individual member
Industry/Profession: Pharmacists, pharmacy practice
Number of members: 60,000
2017 total revenue: \$34 Million
Original anticipated attendance: 5,000
Original conference date: March 20-23, 2020
Virtual conference date(s): On-demand starting late April 2020.
Live session dates TBD

American Association for Anatomy

Shawn Boynes, FASAE, CAE
Executive Director

Type of association: 501(c)3, Individual member
Industry/Profession: Anatomical science
Number of members: 2,450
2017 total revenue: \$4 Million
Original anticipated attendance: 1,100
Original conference date: April 4-7, 2020
Virtual conference date(s): April 6-10, 2020

Endocrine Society

Chris Urena, MBA, CAE
Chief Learning Officer

Type of association: 501(c)3, Individual member
Industry/Profession: Endocrinologists, hormone disorders
Number of members: 18,000
2017 total revenue: \$28 Million
Original anticipated attendance: 9,500
Original conference date: March 28-31, 2020
Virtual conference date(s): June 8-22, 2020

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