

The Impact of COVID-19 on Your Organization

March 2020



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Better Information. Better Solutions.

Prepared for: **csae** | **scda**[®]

Survey Objectives and Methodology

This survey was conducted on behalf of the Canadian Society of Association Executives. The goal of the survey was to obtain preliminary information on the impact of COVID-19 on member organizations. We asked a series of questions in the following topic areas:

- Revenue Projections
- Staff Infrastructure
- Actions Taken / Activities and Programs
- Payroll + Employment Standards Continuity
- Technology and Tools
- Preparedness / Business Continuity
- How Can CSAE Help You
- About Your Organization

The survey launched on March 20th and closed five days later on March 25th. In that time period we were able to collect information from senior staff of 220 member organizations. This represents a response rate of 15%.

The following report looks at the results in total and broken out into the following groupings.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50

Survey Objectives and Methodology (Cont'd)

Definitions: Mean and Median

In tables related to projected revenue loss, we show both “means” and “medians”. The mean is simply the arithmetic average of a set of numbers. We use average and mean interchangeably. It is the sum of all values divided by the number of items in the list.

The mean can be dramatically affected by extreme values in the dataset e.g. a very high reported loss. For this reason, we have also shown medians. The median is the “middle” value and is unaffected by extreme values. When the data are arranged in order of magnitude, half of the data will be smaller than the median and half will be larger.

Highlights

Revenue Projections

- ✓ One-half (49%) of members state that they are extremely/very concerned about long-term sustainability of their organization.
- ✓ Fifty-five percent of members stated that, under current conditions, their organization can remain financially viable for 12 months or less.
- ✓ Forty-seven percent of members felt that it was too early to predict revenue loss. The remaining 53% predicted the following average losses:
 - Next three months – Approximately \$200K (\$203,051)
 - Next six months – Approximately \$370K (\$370,874)
 - Next 12 months – Approximately \$785K (\$785,159)

Staff Infrastructure

- ✓ Just over a (56%) of respondents state that their organization has moved to a 100% virtual workplace, while 2 out of 10 (21%) said that they have moved to a partially virtual workplace. Fifteen percent already had a 100% virtual operation.
- ✓ Approximately a third of members (34%) stated that extra hardware or services were purchased to accommodate to the current situation.

Highlights (Cont'd)

Actions Taken / Activities and Programs

- ✓ The top two actions taken because of COVID-19 have been to cancel or delay in-person member education (66%), followed by cancelling or delaying a conference (58%).
- ✓ Just over a half (56%) of organizations stated canceled activities could have generated revenue. On average, members indicated that 20% of their annual revenue will be lost.
- ✓ One half of respondents (51%) have engaged in advocacy activities on behalf of their organization's members as a result of COVID-19.

Payroll + Employment Standards Continuity

- ✓ Almost 9 out of 10 (88%) of organizations have asked their employees to work from home. Ten percent have laid off employees.
- ✓ Just over a third (35%) of members anticipate having to lay off staff within the next 3 months. Almost one-half (49%) of organizations with an operating budget over \$2M are planning to take this action.

Highlights (Cont'd)

Technology and Tools

- ✓ Approximately two-thirds (65%) of associations have a cloud based payroll system. Just over one half of organizations (52%) have a cloud-based accounting system.
- ✓ A shift to policies that are more “virtual” focused was mentioned by 38% of respondents.
- ✓ The most popular systems for conducting virtual meetings are Zoom (57%), GoToMeeting (30%) and Teams (23%).

Preparedness

- ✓ Just over a quarter (27%) of organizations already have an up to date Business Continuity Plan. Eighty percent of respondents said that their organization has no Business Continuity Plan in place.

Highlights (Cont'd)

How CSAE Can Help

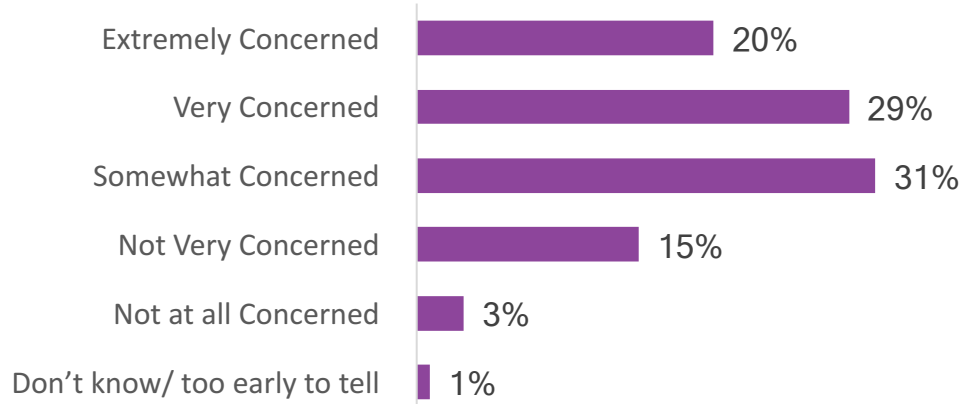
- ✓ Respondents think that their organization would benefit most from continuity planning information (69%), recommendations regarding IT tools (54%), and a survey template that could be sent to their members to gauge their response to COVID-19 (45%).
- ✓ In response to an open-ended question, respondents were most frequently looking for assistance in their advocacy efforts:
 - Advocating for emergency government financial support
 - Lobbying government for support
 - Assisting small business through government funding

Summary Tables - Contents

TOPIC	PAGE	TOPIC	PAGE
Concerns about the long-term sustainability of your organization	9	Issued records of employment	29
Period during which organizations could remain financially viable	10	Employees or their immediate families with COVID-19	30
Total losses over the next 3 months	11	Had new policies in place restricting employees	31
Cumulative losses over the next 6 months	12	Cloud-based payroll system	32
Cumulative losses over the next 12 months	13	Cloud-based accounting system	33
Workplace accommodations during the COVID-19	14	Do you require original receipts and signatures?	34
Availability of infrastructure	15	Changed policies to be more "virtual" focused	35
Purchasing extra hardware or services	16	Systems used for meetings during COVID-19	36
Types of extra hardware purchased	17	Already have an up to date Business Continuity Plan in place?	37
Actions taken because of COVID-19	18	Tested Business Continuity Plan in the last 18 months	38
Other activities cancelled or delayed	19	Statements about Business Continuity Plan	39
Would these cancelled activities generate revenue?	20	Having an emergency communication phone tree in place	40
Percentage of annual revenue lost due to other programs	21	What would be of benefit to you and your organization	41
Change of activities or programs from in-person to virtual	22	Other ways that CSAE could help with COVID-19	42
Infrastructure in place for changing activities from in-person to virtual	23	Type of organization	43
Engaging in any advocacy activity on behalf of your members as a result of COVID-19	24	Role within organization	44
Types of advocacy activities as a result of COVID-19	25	Staff size	45
Asking employees to work from home	26	Operating budget	46
Laying off employees	27	Association composition	47
Anticipating employee lay offs	28	Final comments	48

Concerns about long-term sustainability

Q1. Given the disruptions that you're experiencing what is your level of concern related to the long-term sustainability of your organization?

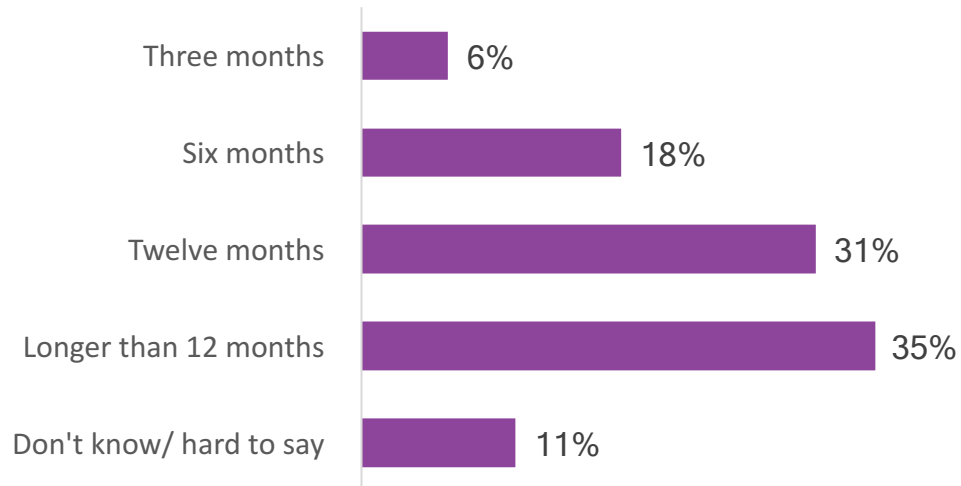


- One-half (49%) of members state that they are extremely/very concerned about long-term sustainability of their organization.
- The highest levels of concern are expressed by Foundations/ Charities and organizations with a smaller operating budget.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	218	58	88	20	17	34	49	64	53	50
Extremely Concerned	20%	21%	14%	5%	47%	32%	25%	19%	23%	16%
Very Concerned	29%	28%	30%	20%	18%	41%	27%	34%	32%	20%
Somewhat Concerned	31%	33%	32%	50%	24%	21%	29%	28%	32%	38%
Not Very Concerned	15%	17%	17%	20%	12%	6%	18%	14%	11%	18%
Not at all Concerned	3%	2%	6%	5%	0%	0%	2%	3%	2%	6%
Don't know/ too early to tell	1%	0%	2%	0%	0%	0%	0%	2%	0%	2%

Period during which organizations could remain financially viable

Q2. Under current conditions, how long could your organization remain financially viable?

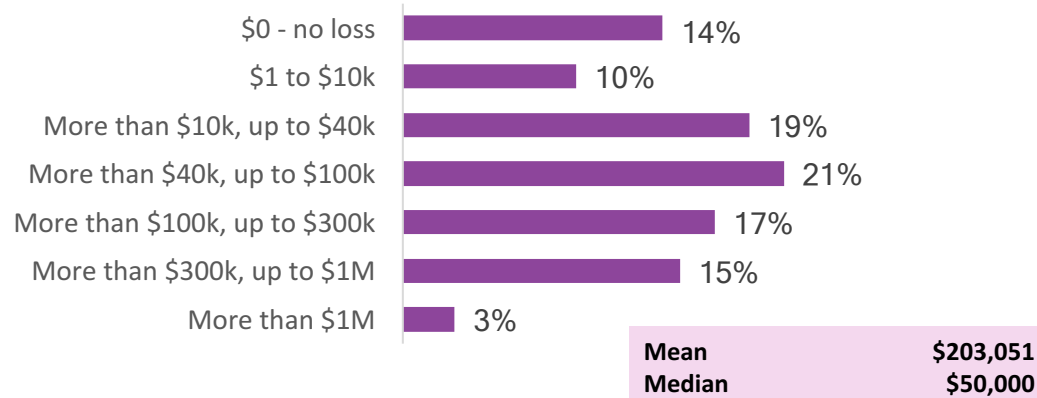


- Fifty-five percent of members stated that, under current conditions, their organization can remain financially viable for 12 months or less.
- Approximately one-third (35%) believe they can remain viable for more than 12 months.
- Concerns regarding financial viability are fairly evenly distributed by organization type and operating budgets.

	Type of Organization						Operating Budget			
	TOTAL	Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Three months	6%	3%	0%	10%	6%	23%	2%	12%	2%	4%
Six months	18%	24%	11%	5%	18%	29%	22%	15%	21%	14%
Twelve months	31%	26%	37%	40%	29%	20%	31%	27%	34%	32%
Longer than 12 months	35%	35%	40%	40%	35%	20%	31%	35%	36%	40%
Don't know/ hard to say	11%	12%	11%	5%	12%	9%	14%	11%	8%	10%

Total loss over the next 3 months

Q3. Based on any cancellations or interruptions that you may be experiencing, what is your anticipated revenue loss over the following time periods?

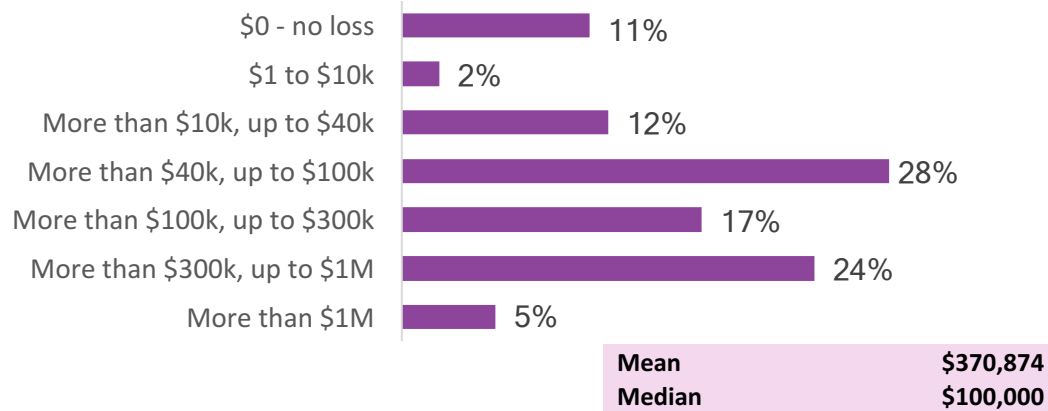


- We asked respondents to estimate their revenue loss over three time periods – three months, six months and 12 months.
- Forty-six percent indicated that it was too early to predict their losses.
- The remaining 54% predicted the following average loss of approximately \$200K (\$203,051) over the next three months.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL	104	27	42	9	8	18	24	29	31	19
\$0 - no loss	14%	7%	21%	22%	13%	6%	29%	14%	3%	16%
\$1 to \$10k	10%	7%	12%	11%	0%	11%	13%	17%	3%	0%
More than \$10k, up to \$40k	19%	26%	26%	0%	0%	11%	25%	21%	13%	16%
More than \$40k, up to \$100k	21%	19%	19%	11%	38%	28%	29%	14%	23%	21%
More than \$100k, up to \$300k	17%	19%	5%	44%	25%	28%	4%	21%	29%	16%
More than \$300k, up to \$1M	15%	11%	17%	11%	25%	17%	0%	14%	26%	21%
More than \$1M	3%	11%	0%	0%	0%	0%	0%	0%	3%	11%
Mean \$	203,051	364,856	122,357	171,667	205,000	160,847	30,344	124,138	299,003	404,368
Median \$	50,000	75,000	32,500	120,000	142,500	50,000	20,000	40,000	200,000	100,000

Cumulative losses over the next 6 months

Q3. Based on any cancellations or interruptions that you may be experiencing, what is your anticipated revenue loss over the following time periods?

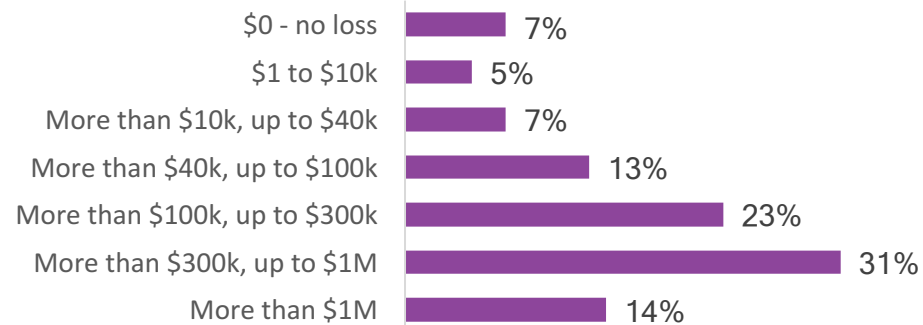


- The average predicted loss over the next six months is approximately \$370K (\$370,874).
- This amount is more than double amongst Trade and Industry associations (\$826,662).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL	92	20	37	10	7	18	22	25	24	20
\$0 - no loss	11%	5%	14%	20%	14%	6%	27%	4%	4%	10%
\$1 to \$10k	2%	5%	0%	10%	0%	0%	5%	4%	0%	0%
More than \$10k, up to \$40k	12%	5%	19%	0%	0%	17%	18%	16%	4%	10%
More than \$40k, up to \$100k	28%	25%	38%	0%	0%	39%	27%	28%	25%	25%
More than \$100k, up to \$300k	17%	15%	14%	20%	57%	11%	23%	24%	8%	15%
More than \$300k, up to \$1M	24%	25%	16%	40%	29%	28%	0%	24%	50%	25%
More than \$1M	5%	20%	0%	10%	0%	0%	0%	0%	8%	15%
Mean \$	370,874	826,662	157,459	454,500	337,143	265,389	59,818	201,700	565,989	721,200
Median \$	100,000	182,500	60,000	282,500	250,000	100,000	45,000	100,000	400,000	225,000

Cumulative losses over the next 12 months

Q3. Based on any cancellations or interruptions that you may be experiencing, what is your anticipated revenue loss over the following time periods?



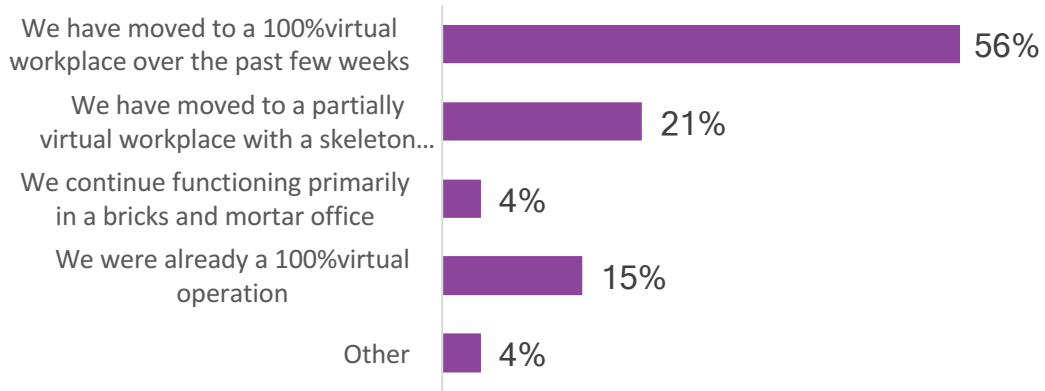
Mean \$785,159
Median \$270,000

- Over the next 12 months, the anticipated revenue loss is approximately \$785K (\$785,159).
- Again, this amount is much higher amongst amongst Trade and Industry associations.

	Type of Organization						Operating Budget			
	TOTAL	Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL	84	18	34	10	6	16	21	24	23	16
\$0 - no loss	7%	6%	9%	10%	0%	6%	14%	4%	4%	6%
\$1 to \$10k	5%	6%	6%	10%	0%	0%	19%	0%	0%	0%
More than \$10k, up to \$40k	7%	6%	9%	0%	17%	6%	19%	4%	0%	6%
More than \$40k, up to \$100k	13%	6%	24%	0%	0%	13%	10%	21%	9%	6%
More than \$100k, up to \$300k	23%	22%	24%	20%	17%	25%	29%	29%	22%	6%
More than \$300k, up to \$1M	31%	33%	26%	40%	50%	25%	10%	42%	48%	25%
More than \$1M	14%	22%	3%	20%	17%	25%	0%	0%	17%	50%
Mean \$	785,159	1,195,833	277,162	1,958,000	606,667	748,125	95,405	355,000	1,243,043	1,720,313
Median \$	270,000	500,000	125,000	400,000	450,000	385,000	35,000	260,000	500,000	1,300,000

Workplace accommodations during the COVID-19

Q4. As a result of the COVID-19 crisis which of the following best describes your association workplace?

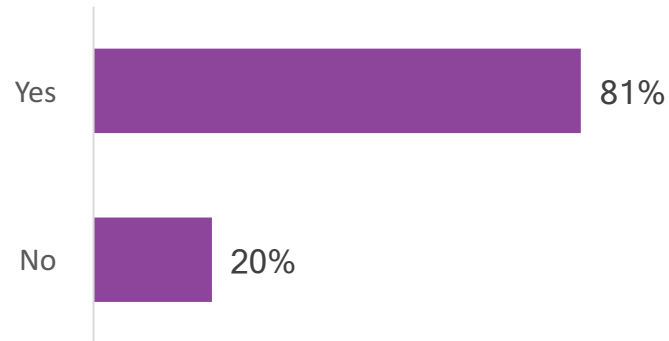


- Just over (56%) of respondents state that their organization has moved to a 100% virtual workplace, while 2 out of 10 (21%) said that they have moved to a partially virtual workplace. Fifteen percent already had a 100% virtual operation.
- The highest percentage of organizations that moved to a 100% virtual workplace was among Trade and Business organizations (71%) and institutions with the operating budget over \$2M (68%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
We have moved to a 100% virtual workplace over the past few weeks	56%	71%	57%	45%	35%	43%	47%	44%	64%	68%
We have moved to a partially virtual workplace with a skeleton staff in a bricks and mortar office	21%	10%	16%	30%	41%	40%	12%	23%	25%	26%
We continue functioning primarily in a bricks and mortar office	4%	12%	1%	0%	0%	3%	6%	5%	6%	0%
We were already a 100% virtual operation	15%	3%	20%	25%	24%	9%	31%	21%	4%	4%
Other	4%	3%	6%	0%	0%	6%	4%	8%	2%	2%

Availability of infrastructure

Q5. Did you already have that infrastructure in place that allowed you to make that transition?

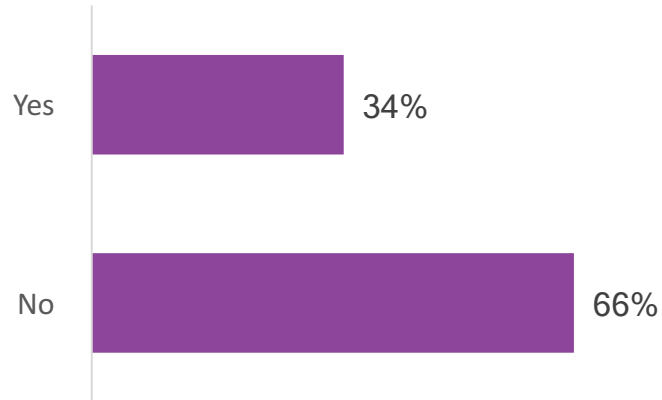


- Eighty-one percent of respondents stated that their organization already had infrastructure in place that allowed them to make this transition.
- This percentage is relatively consistent across organization types and operating budgets.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	169	47	65	15	13	29	29	44	47	47
Yes	81%	81%	80%	80%	77%	83%	90%	75%	72%	87%
No	20%	19%	20%	20%	23%	17%	10%	25%	28%	13%

Purchasing extra hardware or services

Q6. Did you have to purchase extra hardware or services?



- Approximately a third of members (34%) stated that extra hardware or services were purchased for accommodating to current situation.
- The lowest proportion of companies which purchased extra hardware or services was among Foundations/ Charities (15%)

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	169	47	65	15	13	29	29	44	47	47
Yes	34%	34%	40%	33%	15%	31%	31%	32%	32%	40%
No	66%	66%	60%	67%	85%	69%	69%	68%	68%	60%

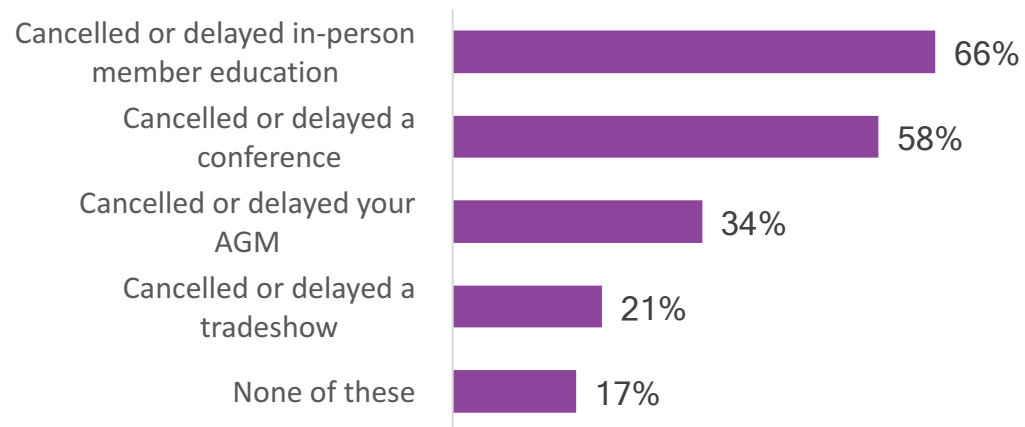
Types of extra hardware purchased

Q7. What hardware or services did you have to purchase?

Laptops	Zoom subscription	IT services	Printer/Scanners
<ul style="list-style-type: none"> laptops and enabling virtual software Laptops and monitors laptops, software, etc. – technology Had to rent several lap-top computers for staff who work off of desktop computers exclusively in the office, and seek tech support to migrate those staff to those laptops Laptops for stuff 	<ul style="list-style-type: none"> laptop, Zoom subscription, and website developer support person Set up VPN for staff who did not already have it. Added Zoom teleconference service ZOOM Zoom Pro account Zoom, plus new laptops for some staff. Zoom. 	<ul style="list-style-type: none"> IT consulting More cell phone service; more IT support time to set up IT services to allow for remote access We are looking at greater capacity for our virtual meetings. 	<ul style="list-style-type: none"> One printer, one scanner Printer add to our webinar services to be able to hold additional members Printer for a staff person who did not have one at home printer/scanners for staff, looking into VOIP options. scanners, printers Stand alone printers
Video Conferencing software	Various Subscriptions for online services	Technology improving virtual connection capacity	Other
<ul style="list-style-type: none"> Extra laptops. VPN licenses, Video Conferencing software licenses, extra band width capacity from Bell Monitors, improved remote access for office staff, increased number of accounts for video and conference calling services Video conferencing services videoconferencing capability Videoconferencing hardware, webinar and virtual meeting software. 	<ul style="list-style-type: none"> online subscription of Adobe/remote software IT services to allow for remote access Video conferencing services Virtual meeting services 	<ul style="list-style-type: none"> We are looking at greater capacity for our virtual meetings. Stronger servers to accelerate the speed of connection to the office online meeting resources new virtual sharing platform 	<ul style="list-style-type: none"> various small office equipment supplies Wi-fi extender Moved to MS 365, updated phone system Google G-Suite for Business additional teleworker phone lines

Actions taken because of COVID-19

Q.8 Which of the following actions have you taken because of the COVID-19 crisis?

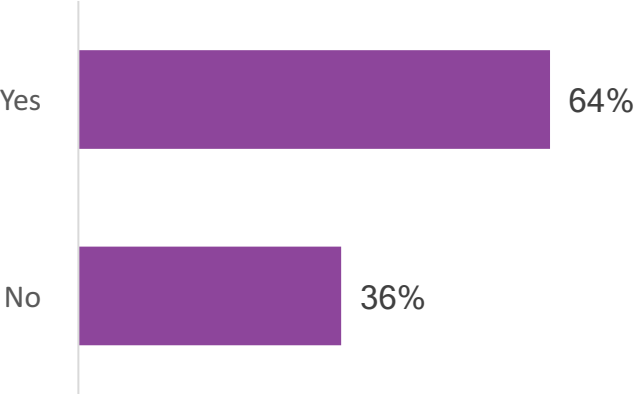


- The top two actions taken because of COVID-19 were cancelling or delaying in-person member education (66%), followed by cancelling or delaying a conference (58%).
- The highest proportion of institutions cancelling in-person member education was reported by Professional/ Occupation organizations. (72%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	57	89	20	17	35	49	66	53	49
Cancelled or delayed in-person member education	66%	67%	72%	55%	47%	66%	63%	67%	64%	71%
Cancelled or delayed a conference	58%	56%	60%	55%	71%	57%	63%	49%	62%	61%
Cancelled or delayed your AGM	34%	37%	36%	35%	24%	31%	41%	30%	40%	29%
Cancelled or delayed a tradeshow	21%	23%	24%	5%	12%	23%	16%	20%	26%	20%
None of these	17%	18%	14%	30%	18%	17%	18%	18%	19%	12%

Other activities cancelled or delayed

Q.9 Are there other programs or activities that have been cancelled or delayed?

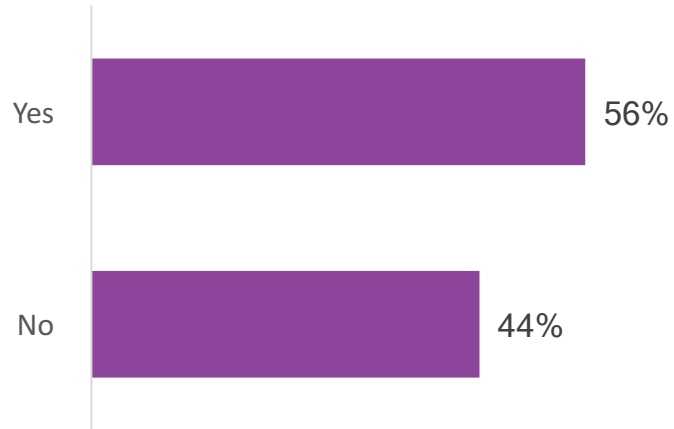


- Approximately two thirds of organizations (64%) also had to cancel or delay other activities.
- The highest portion of cancelations/delays of other activities was among Foundations/ Charities (77%), and associations with an operating budget over \$2M (78%)

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	215	57	89	18	17	33	47	65	52	49
Yes	64%	61%	58%	61%	77%	79%	38%	66%	73%	78%
No	36%	39%	42%	39%	24%	21%	62%	34%	27%	22%

Would these cancelled activities generate revenue?

Did these programs or activities generate revenue?

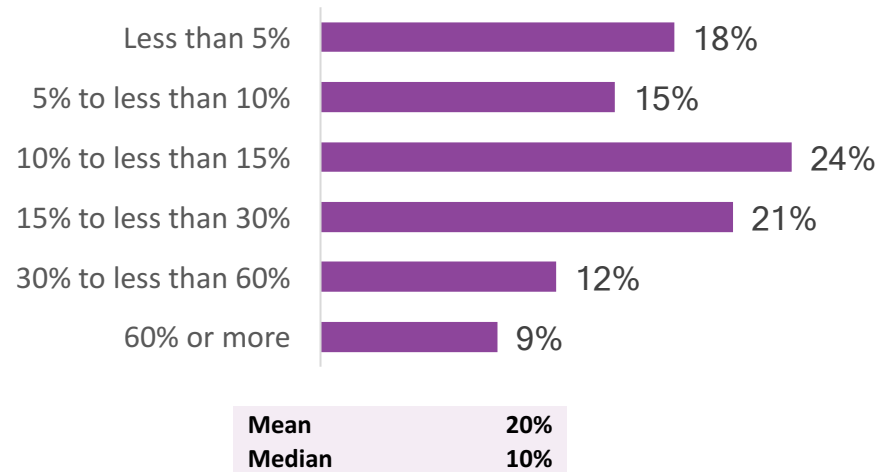


- Just over a half (56%) of organizations stated that activities that have been cancelled could have generated revenue.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	138	35	52	11	13	26	18	43	38	38
Yes	56%	63%	42%	55%	54%	73%	56%	58%	50%	58%
No	44%	37%	58%	46%	46%	27%	44%	42%	50%	42%

Percentage of annual revenue lost due to cancellation/delay of other programs or activities

What percentage of your annual revenue was lost due to other programs or activities that have been cancelled or delayed?

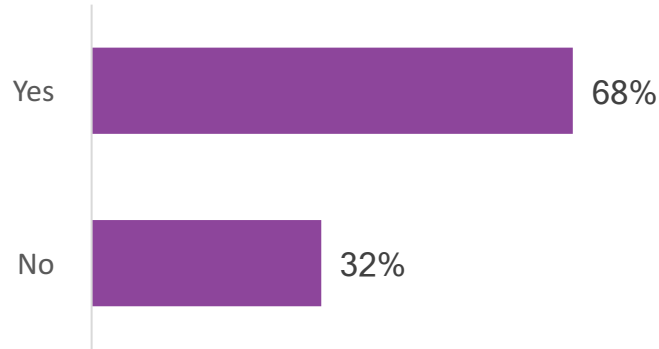


- We asked participants to estimate percentage of annual revenue which was lost due to other programs or activities that have been cancelled or delayed. On average, members stated that 20% of their annual revenue will be lost.

	Type of Organization						Operating Budget			
	TOTAL	Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL	66	18	19	6	6	17	9	25	16	16
Less than 5%	18%	22%	26%	0%	0%	18%	22%	20%	13%	19%
5% to less than 10%	15%	11%	5%	33%	17%	24%	0%	20%	6%	25%
10% to less than 15%	24%	22%	26%	17%	67%	12%	44%	16%	19%	31%
15% to less than 30%	21%	22%	21%	50%	17%	12%	11%	24%	31%	13%
30% to less than 60%	12%	17%	0%	0%	0%	29%	22%	12%	19%	0%
60% or more	9%	6%	21%	0%	0%	6%	0%	8%	13%	13%

Change of activities or programs from in-person to virtual

Q.10 Have you changed any activities or programs from in-person to virtual over the past few weeks e.g. member education or your AGM?

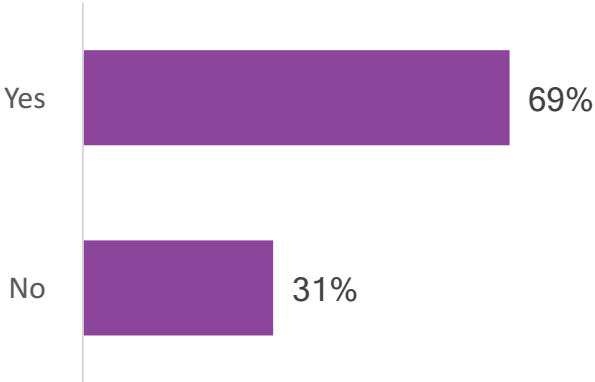


- Almost 7 out of 10 participants (68%) stated that there was a change of activities or programs from in-person to virtual.
- The highest proportion of activity shifted to a virtual mode was among Health, Social, Education, Religion organizations (75%) and those with an operating budget of over \$2M (78%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Yes	68%	67%	69%	75%	65%	63%	59%	62%	72%	78%
No	32%	33%	32%	25%	35%	37%	41%	38%	28%	22%

Infrastructure in place for changing activities from in-person to virtual

11. Did you already have the infrastructure in place to do this?

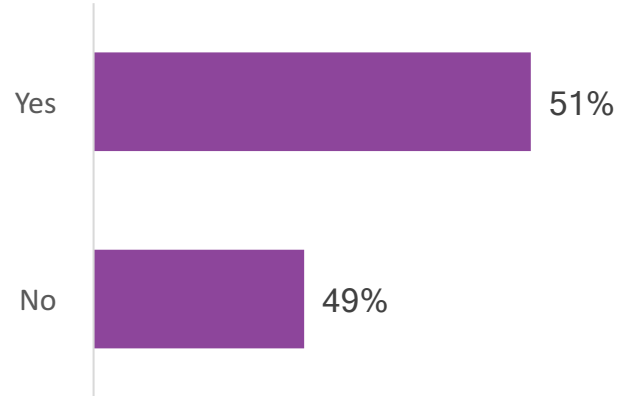


- Around 7 out of 10 respondents (69%) stated that there was already infrastructure in place for accommodating to changes.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	149	39	61	15	11	22	29	41	38	39
Yes	69%	67%	67%	67%	82%	73%	66%	71%	68%	69%
No	31%	33%	33%	33%	18%	27%	35%	29%	32%	31%

Engaging in any advocacy activity on behalf of your members as a result of COVID-19

Q.12 Have you engaged in any advocacy activities on behalf of your members as a result of COVID-19?



- One half of respondents (51%) have engaged in advocacy activities on behalf of their organization's members as a result of COVID-19.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Yes	51%	62%	45%	45%	59%	51%	35%	50%	66%	52%
No	49%	38%	55%	55%	41%	49%	65%	50%	34%	48%

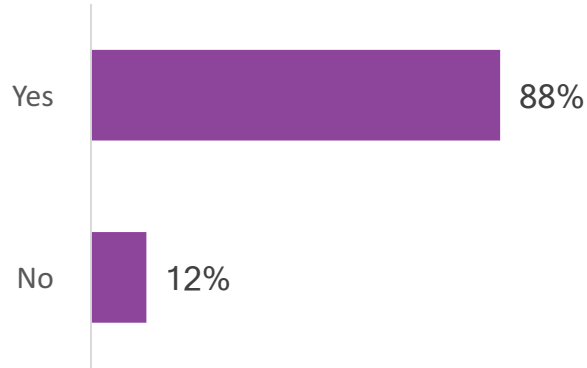
Types of advocacy activities on as a result of COVID-19

Please describe this activity:

FINANCIAL ASSISTANCE	SAFETY MEASURES	GOVERNMENT ADVOCACY	EI BENEFITS
<ul style="list-style-type: none"> Financial assistance and transportation Financial support for members - mandated closure and not eligible for EI. Letters to Minister Morneau re financial support for our members. Over 70% are in private practice. 	<ul style="list-style-type: none"> As emergency first responders, we are advocating for health and safety measures for the fire service. Advocating for funding for the association With respect to examinations for our residents and supporting measures to ensure our members are protected with appropriate safety attire Food insecurity, food safety 	<ul style="list-style-type: none"> Government advocacy Government outreach provincially and federally. Collaboration with multiple provincial and federal partners Government relations with the province Letters to government regarding physician fees for virtual care and relaxation of rules around paperwork 	<ul style="list-style-type: none"> Active lobbying for EI benefit improvements and access to surgical masks and gloved Support for team members re: layoffs EI access for self-employed clarification of EI benefits for laid off workers
REPRESENTING INDUSTRY INTERESTS	SUPPORT OF SCHOOLS	INCLUSION ON THE LIST OF ESSENTIAL BUSINESSES	INFORMATIONAL SUPPORT
<ul style="list-style-type: none"> Joint industry statement Ending industry specific impacts of COVID-19. Planning conference calls and member outreach Working with Industry, Science and Economic Development Canada and the Canadian Manufacturing Coalition to highlight manufacturing issues across Canada. 	<ul style="list-style-type: none"> Advising educational accredited schools what will be acceptable to maintain their accreditation status. Advocated for pay during school closures for non-unionized members Direct communications with school boards 	<ul style="list-style-type: none"> Advocating for our members to be included in definition of essential industries Defining essential services and if our industry qualifies with the province. Keeping the construction sector as an essential service Lobbied the Province regarding the provision of essential services 	<ul style="list-style-type: none"> Assistance with links to government programs and information Interpreting information from the Province and communicating/providing impact to the Province

Asking employees to work from home

Q.13 Have you asked employees to work from home?

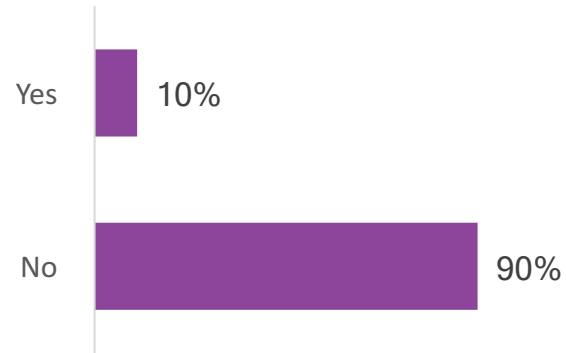


- Almost 9 out of 10 (88%) of organizations have asked their employees to work from home.

	TOTAL	Type of Organization					Operating Budget			
	TOTAL	Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	58	89	19	17	35	48	66	53	50
Yes	88%	85%	90%	90%	88%	89%	73%	85%	94%	100%
No	12%	16%	10%	11%	12%	11%	27%	15%	6%	0%

Laying off employees

Q.14 Have you laid off any employees?

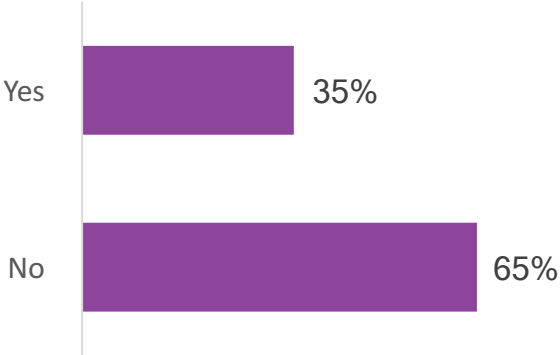


- The vast majority of respondents (90%) stated that employees were not laid off at their organization.
- The highest proportion of lay offs was among Foundation/ Charitable organizations (24%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	57	89	20	17	35	48	66	53	50
Yes	10%	9%	6%	5%	24%	20%	2%	14%	9%	12%
No	90%	91%	94%	95%	77%	80%	98%	86%	91%	88%

Anticipating employee lay offs

Q.15 Do you anticipate having to lay off staff within the next 3 months?

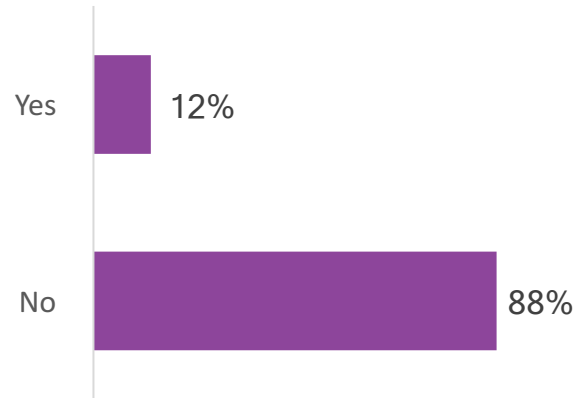


- Just over a third (35%) of participants anticipate having to lay off staff within the next 3 months. Almost one-half (49%) of organizations with an operating budget over \$2M are planning to take this action.

	Type of Organization						Operating Budget			
	TOTAL	Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	218	57	88	20	17	35	48	66	53	49
Yes	35%	42%	22%	25%	35%	63%	17%	30%	45%	49%
No	65%	58%	78%	75%	65%	37%	83%	70%	55%	51%

Issued records of employment

Q16. Did you have to issue Records of Employment for any employees?

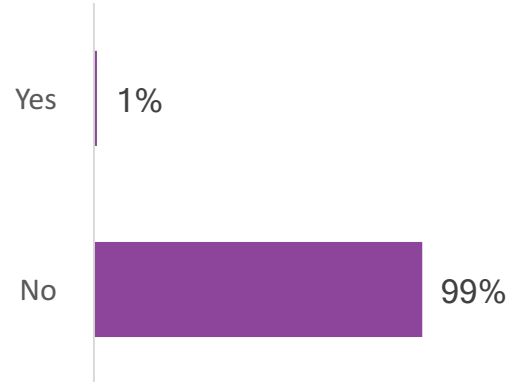


- Twelve percent of respondents stated that they had issued Records of Employment for any employees. This was twice as likely (24%) at Foundations/ Charities.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	218	58	88	19	17	35	49	65	52	50
Yes	12%	7%	8%	5%	24%	31%	8%	14%	12%	14%
No	88%	93%	92%	95%	77%	69%	92%	86%	89%	86%

Employees or their immediate families had a presumptive or confirmed case of COVID-19

Q.17 Have any employees or their immediate families had a presumptive or confirmed case of COVID-19?

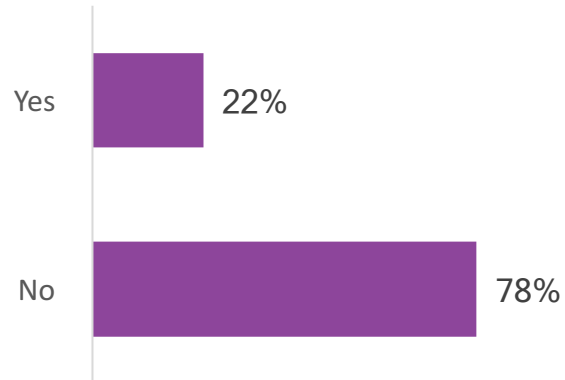


- Only 1% of respondents said that they have any employees or their immediate families had a presumptive or confirmed case of COVID-19.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Yes	1%	0%	3%	0%	0%	0%	0%	2%	0%	4%
No	99%	100%	97%	100%	100%	100%	100%	99%	100%	96%

Had to put new policies in place restricting employees from returning to work prior to mandated work stoppages?

Q.18 Did you have to put new policies in place restricting employees from returning to work prior to mandated work stoppages due to COVID-19?

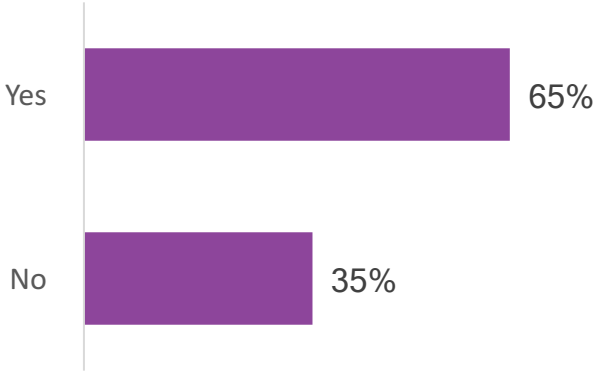


- Twenty-two percent of respondents stated that they have put new policies in place restricting employees from returning to work prior to mandated work stoppages due to COVID-19.
- The highest proportion of organizations which has to do so was among those with an operating budget of over \$2M.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	58	89	20	17	34	49	65	53	50
Yes	22%	22%	15%	15%	35%	41%	14%	19%	23%	36%
No	78%	78%	85%	85%	65%	59%	86%	82%	77%	64%

Cloud-based payroll system

Q.19 Is your payroll cloud based?

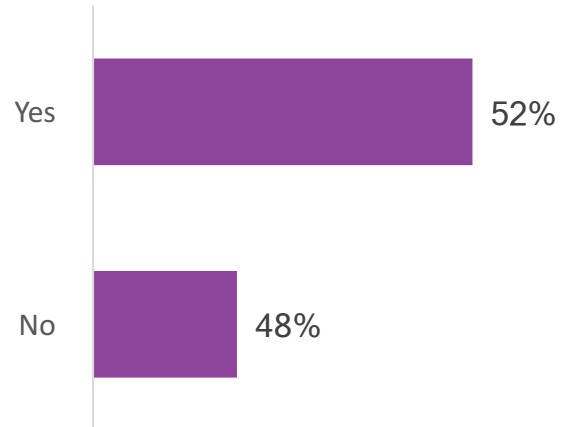


- Around two-thirds (65%) of associations have a cloud based payroll system.
- The highest portion of organizations that have a cloud based payroll system is among Foundations/Charities (82%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	57	89	20	17	34	49	65	52	50
Yes	65%	56%	71%	60%	82%	59%	51%	59%	79%	74%
No	35%	44%	29%	40%	18%	41%	49%	42%	21%	26%

Cloud-based accounting system

Q.20 Is your accounting system cloud based?

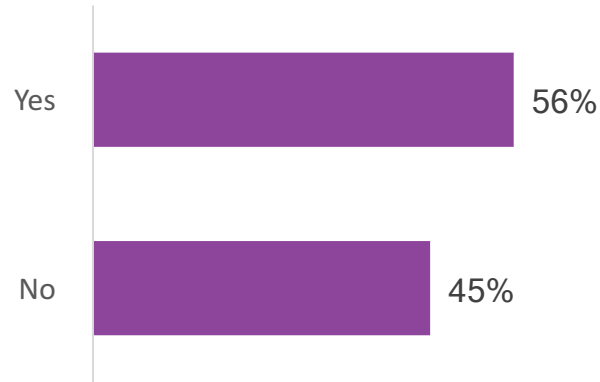


- Just over a half of organizations (52%) have a cloud-based accounting system.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Yes	52%	45%	60%	45%	47%	49%	49%	47%	55%	60%
No	48%	55%	40%	55%	53%	51%	51%	53%	45%	40%

Do you require original receipts and signatures?

Q.21 Do you require original receipts and signatures?

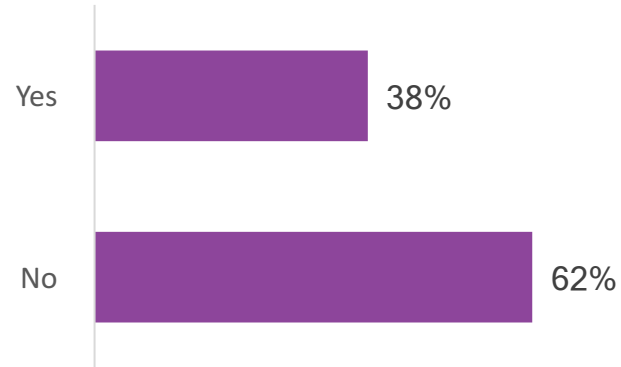


Over half (56%) of organizations stated that they require original receipts and signatures. Three quarters (75%) of Foundations/ Charities require them.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	16	34	48	66	52	50
Yes	56%	67%	43%	55%	75%	59%	65%	53%	52%	54%
No	45%	33%	57%	45%	25%	41%	35%	47%	48%	46%

Changed policies to be more "virtual" focused

Q.22 Have you changed policies to be more "virtual" focused?

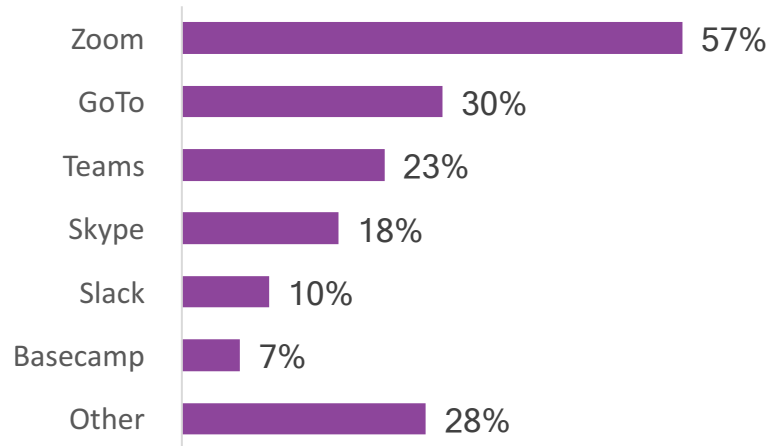


- A shift to policies that are more "virtual" focused was mentioned by 38% of respondents. This is most often the case amongst associations with an operating budget over \$2M. (54%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	58	89	20	17	34	49	66	52	50
Yes	38%	38%	36%	25%	47%	47%	16%	41%	40%	54%
No	62%	62%	64%	75%	53%	53%	84%	59%	60%	46%

Systems used for meetings during COVID-19

Q.23 What system or systems are you using for meetings during COVID-19?

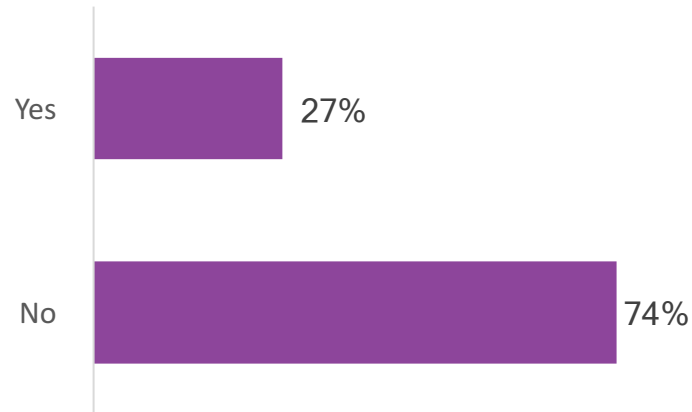


- The most popular systems for conducting virtual meetings are Zoom (57%), GoToMeeting (30%) and Teams (23%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	213	55	87	19	17	34	47	66	50	49
Zoom	57%	56%	60%	58%	65%	44%	60%	50%	56%	65%
GoToMeeting	30%	27%	35%	32%	24%	24%	19%	35%	36%	27%
Teams	23%	27%	21%	26%	18%	24%	9%	9%	38%	41%
Skype	18%	16%	17%	21%	24%	18%	15%	15%	12%	31%
Slack	10%	11%	10%	11%	6%	9%	4%	6%	12%	18%
Basecamp	7%	4%	7%	5%	18%	6%	4%	5%	10%	8%
Other	28%	27%	24%	26%	35%	35%	28%	36%	16%	27%

Already have an up-to-date Business Continuity Plan in place

Q.24 Did you already have an up to date Business Continuity Plan in place?

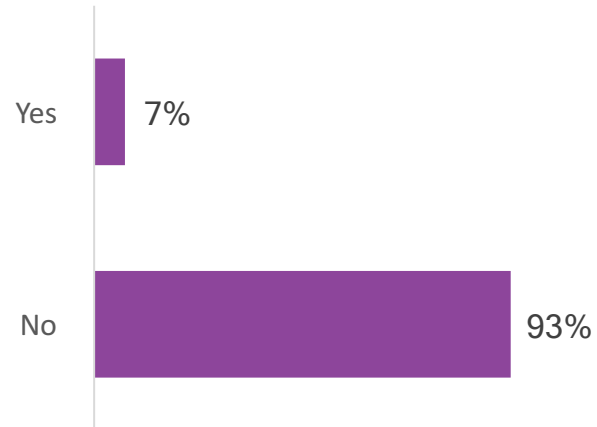


- Just over a quarter (27%) of organizations already have an up-to-date Business Continuity Plan.
- The biggest portion having a Business Continuity Plan in place is among Professional/ Occupation organizations (34%).

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	58	89	19	17	35	49	66	52	50
Yes	27%	21%	34%	26%	24%	20%	18%	24%	33%	32%
No	74%	79%	66%	74%	77%	80%	82%	76%	67%	68%

Tested Business Continuity Plan in the last 18 months

Q.25 Had it been tested in the last 18 months?

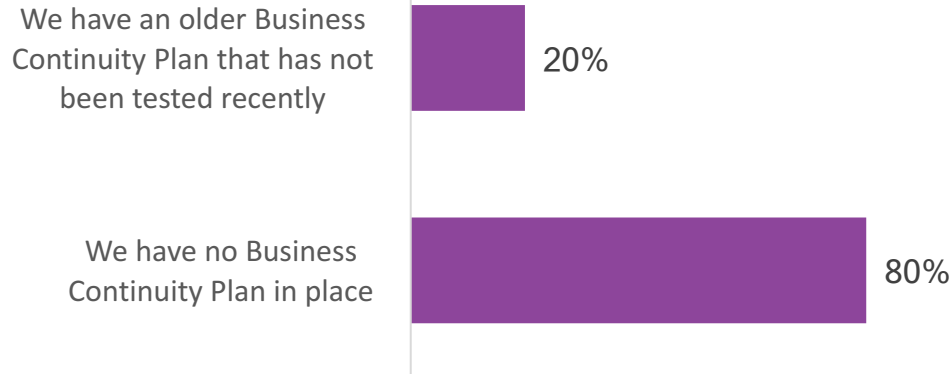


- The Business Continuity Plan was tested during the last 18 months at only 7% of organizations.
- However, one quarter (25%) of institutions with operating budgets over \$2M have tested this plan.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	58	12	30	5	4	7	9	16	17	16
Yes	7%	8%	10%	0%	0%	0%	0%	0%	0%	25%
No	93%	92%	90%	100%	100%	100%	100%	100%	100%	75%

Statements about Business Continuity Plan

Which of the following reflect your Business Continuity Plan?

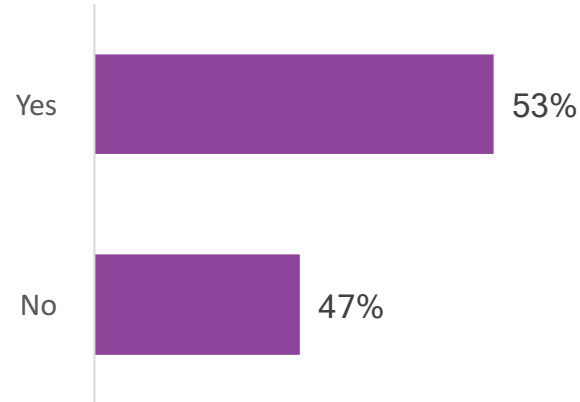


- Eighty percent of respondents said that their organization has no Business Continuity Plan in place. This is less often the case amongst organizations with operating budgets in excess of \$2 M.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	160	45	59	14	13	28	40	50	35	33
We have an older Business Continuity Plan that has not been tested recently	20%	24%	15%	7%	15%	32%	10%	14%	17%	46%
We have no Business Continuity Plan in place	80%	76%	85%	93%	85%	68%	90%	86%	83%	55%

Having an emergency communication phone tree in place for your employees

Q.26 Did you have an emergency communication phone tree in place for your employees?

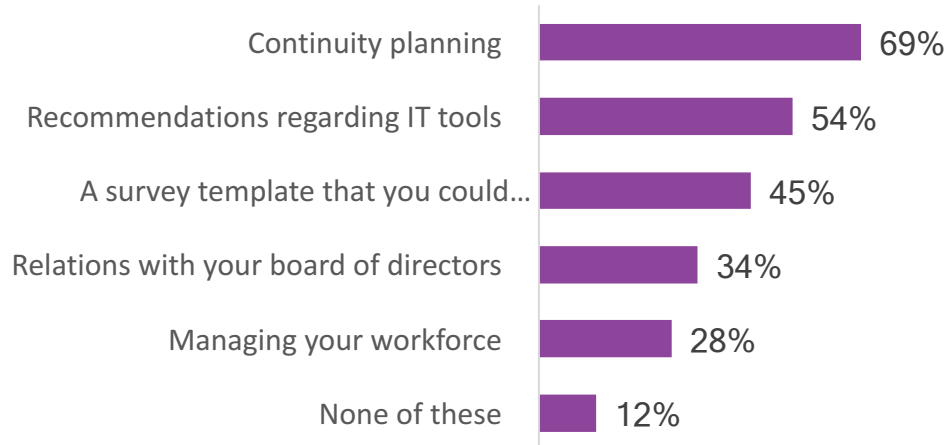


- Emergency communication phone trees are in place for employees exists in just over a half of organizations (53%). Larger organizations are more likely to have this in place.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Yes	53%	55%	54%	55%	47%	49%	33%	53%	64%	64%
No	47%	45%	46%	45%	53%	51%	67%	47%	36%	36%

What would be of benefit to you and your organization?

Q.27 Which of the following would be benefit to you and your organization?



- Respondents think that their organization would benefit most from continuity planning information (69%), recommendations regarding IT tools (54%), a survey template that could be sent to their members to gauge their response to COVID-19 (45%).

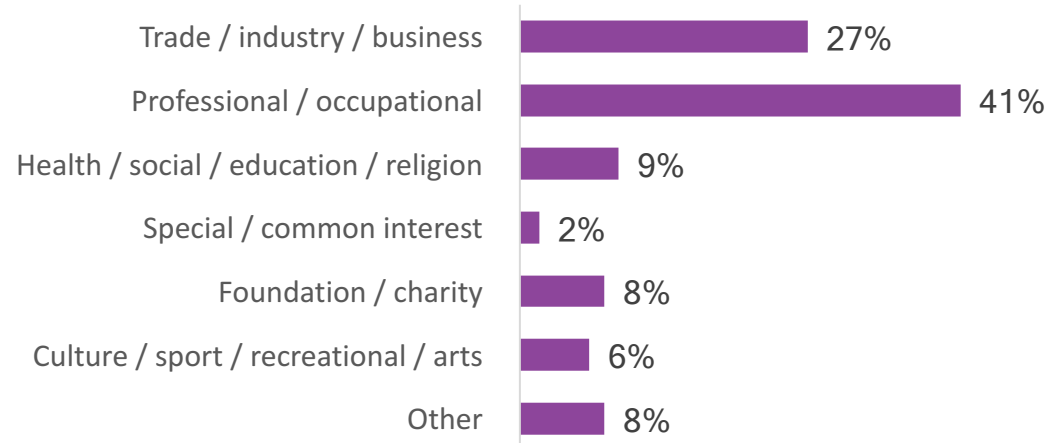
	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	213	56	86	20	16	34	46	65	51	49
Continuity planning	69%	64%	64%	80%	94%	68%	74%	65%	73%	65%
Recommendations regarding IT tools	54%	45%	59%	60%	63%	47%	63%	55%	59%	41%
A survey template that you could send your members to gauge their response to COVID-19	45%	48%	43%	35%	56%	47%	46%	43%	51%	41%
Relations with your board of directors	34%	27%	34%	35%	56%	35%	57%	29%	31%	22%
Managing your workforce	28%	34%	21%	25%	44%	32%	26%	22%	39%	29%
None of these	12%	14%	11%	10%	0%	21%	15%	14%	4%	14%

Other ways that CSAE could help with COVID-19

FINANCIAL: Accessing and Understanding Government Funding and Programs – 57%	TECHNOLOGY ISSUES – 14%	SUBJECTS OR TOPICS OF INTEREST – 11%	EMPLOYEE ENGAGEMENT – 9%
<ul style="list-style-type: none"> • Advocating for emergency government financial support • Lobbying government for support • Assisting small business through government funding • Communication to associations regarding available government funding • No/low interest loans • Ways to calculate potential financial loss 	<ul style="list-style-type: none"> • Technology innovation and use – virtual delivery services • Solutions for overloaded systems • Connectivity issues – Sharing services • Affordable technology • Navigating technology – learning new programs 	<ul style="list-style-type: none"> • Business continuity policies and plans • Revenue generating ideas • Rebuilding plans and tools • Possible re-invention ideas • Emergency preparedness and continuity plan 	<ul style="list-style-type: none"> • Maintaining team dynamics and connections • Support for team members re: layoffs • Mental health issues • COVID-19 specific information
MANAGING LEGAL ISSUES/CANCELLATIONS – 9%	CONTINUING EDUCATION AND COMMUNICATION ISSUES – 8%	ASSOCIATION SPECIFIC ISSUES – 5%	SURVEY SPECIFIC COMMENTS - 7%
<ul style="list-style-type: none"> • The impact of conference cancellations and the impact to associations • Contract negotiations re: cancellations • Scheduling Issues – cancellations and re-booking • Issues with hotels and conference venues • Cancellations – government enforced closures 	<ul style="list-style-type: none"> • Affordable webinars • Sharing on Learning Management Systems (LMS) • Teleconferencing • Course training • Make resources available to past and non-members <p>Approximate numbers: 7</p>	<ul style="list-style-type: none"> • Association closures – assistance with this scenario • Acknowledgement of associations value and importance 	<ul style="list-style-type: none"> • Thank you – great job • Survey too long • Reduce the number of questions • More direct
<p>Don't Know/ Unsure/ No Comments - 4%</p>			

Type of organization

Q.29 Which of the following categories best describes your organization?

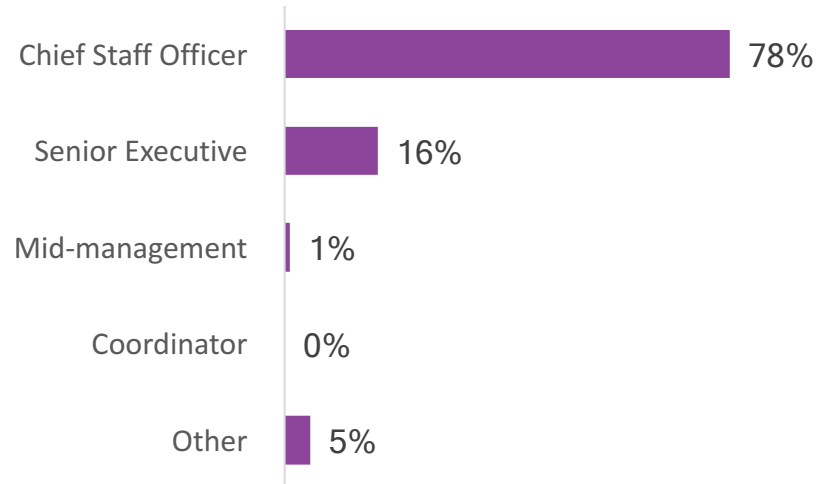


- 41% of respondents were from Professional / occupational type of organizations, followed by 27% of those employed in Trade / industry / business.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	58	89	20	17	35	49	65	53	50
Trade / industry / business	27%	100%	0%	0%	0%	0%	22%	20%	28%	36%
Professional / occupational	41%	0%	100%	0%	0%	0%	43%	43%	38%	40%
Health / social / education / religion	9%	0%	0%	100%	0%	0%	12%	5%	15%	6%
Special / common interest	2%	0%	0%	0%	0%	11%	2%	3%	2%	0%
Foundation / charity	8%	0%	0%	0%	100%	0%	10%	9%	6%	6%
Culture / sport / recreational / arts	6%	0%	0%	0%	0%	40%	2%	12%	6%	2%

Role within organization

Q.30 Which of the following best describes your role within your organization?

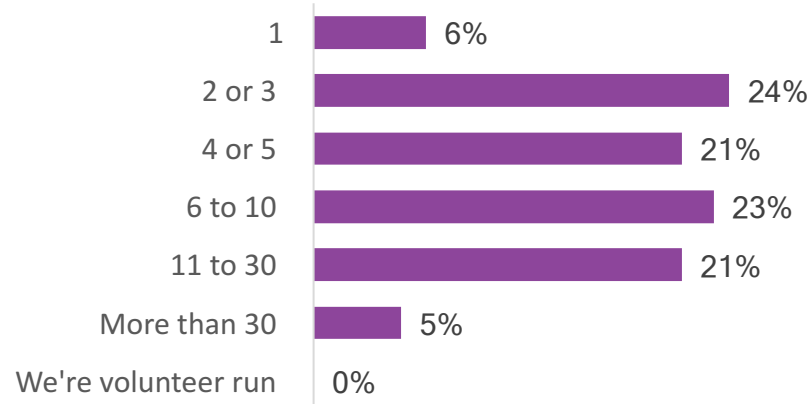


- Almost 8 out of 10 respondents (78%) were Chief Staff Officers, followed by 16% of those who were Senior Executives.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Chief Staff Officer	78%	76%	81%	75%	82%	74%	76%	77%	85%	76%
Senior Executive	16%	17%	14%	20%	12%	23%	14%	18%	11%	20%
Mid-management	1%	3%	0%	0%	0%	0%	0%	0%	4%	0%
Coordinator	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	5%	3%	6%	5%	6%	3%	10%	5%	0%	4%

Staff size

Q.31 What is your current staff size?

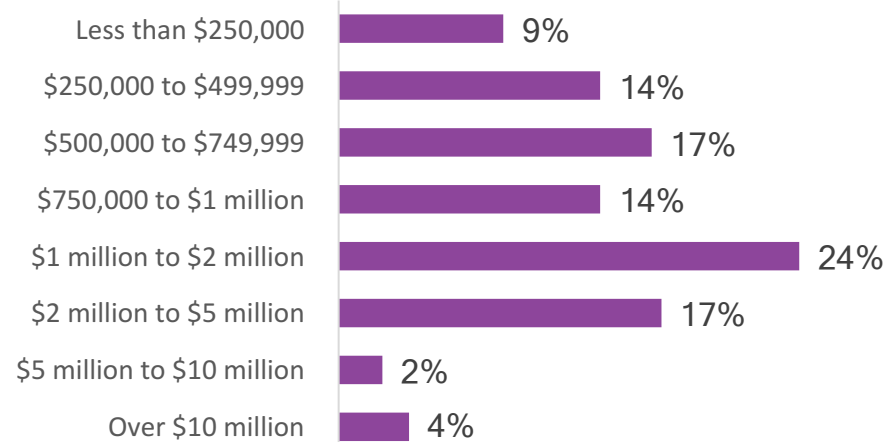


- Organizations are fairly evenly distributed by staff size – from 2 staff members to 30.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	219	58	88	20	17	35	49	65	53	50
1	6%	5%	9%	5%	12%	0%	25%	3%	0%	0%
2 or 3	24%	17%	28%	25%	35%	14%	59%	31%	4%	0%
4 or 5	21%	26%	17%	20%	6%	31%	8%	43%	23%	2%
6 to 10	23%	28%	19%	30%	12%	26%	8%	20%	49%	14%
11 to 30	21%	22%	22%	10%	18%	26%	0%	3%	23%	64%
More than 30	5%	2%	5%	10%	18%	3%	0%	0%	2%	20%
We're volunteer run	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Operating budget

Q.32 What is your current operating budget?

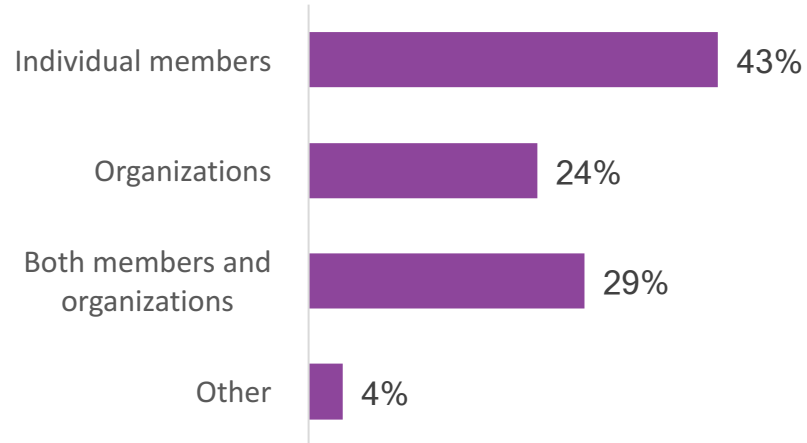


- Approximately half (54%) of the organizations participating in this survey have an operating budget under \$1M.
- Twenty-four percent have an operating budget between \$1M and \$2M.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	218	57	89	20	17	34	49	66	53	50
Less than \$250,000	9%	5%	10%	5%	12%	12%	39%	0%	0%	0%
\$250,000 to \$499,999	14%	14%	14%	25%	18%	6%	61%	0%	0%	0%
\$500,000 to \$749,999	17%	9%	19%	10%	24%	24%	0%	55%	0%	0%
\$750,000 to \$1 million	14%	14%	12%	5%	12%	21%	0%	46%	0%	0%
\$1 million to \$2 million	24%	26%	23%	40%	18%	21%	0%	0%	100%	0%
\$2 million to \$5 million	17%	25%	17%	10%	0%	18%	0%	0%	0%	74%
\$5 million to \$10 million	2%	5%	2%	0%	0%	0%	0%	0%	0%	10%
Over \$10 million	4%	2%	3%	5%	18%	0%	0%	0%	0%	16%

Association composition

Q.33 Is your association comprised of individual members, organizations, or a combination of individual members and organizations?



- Forty-three percent of respondents stated that their organization consists of individual members, followed by 29% which have both individual members and organizations, and a quarter (24%) are composed of organizations only.

	TOTAL	Type of Organization					Operating Budget			
		Trade/ Ind./ Biz	Prof./ Occ.	Health/ Soc./ Ed./ Religion	Found./ Charity	Other	<\$500k	\$500k to \$1M	\$1M to \$2M	Over \$2M
TOTAL RESPONDENTS	220	58	89	20	17	35	49	66	53	50
Individual members	43%	19%	69%	35%	29%	31%	47%	44%	34%	50%
Organizations	24%	53%	7%	10%	29%	26%	20%	18%	23%	36%
Both members and organizations	29%	28%	25%	45%	24%	34%	31%	32%	40%	12%
Other	4%	0%	0%	10%	18%	9%	2%	6%	4%	2%

Final comments

Q.35 Do you have any additional comments?

GOOD JOB BEING PRO-ACTIVE	CONFERENCES MIGHT BE CANCELLED	WOULD LIKE TO SEE THE RESULTS	CONCERNS
<ul style="list-style-type: none"> CSAE has been doing an exemplary job with COVID-19 situation. Your pro-activity and thoughtfulness is greatly appreciated Stay safe. Thanks for your advocacy work on behalf of associations.. Well done. Many thanks for asking these questions I think CSAE has been very reactive to this situation and doing a good job 	<ul style="list-style-type: none"> While we have not cancelled any events we are contingency planning for such an occurrence should the current situation continue. We have not yet had to cancel our conference; however, I am 90% confident we're going to have to. At this time, cancellation/contingency planning for this, is in full force. 	<ul style="list-style-type: none"> I am interested to see the results! I hope the results will be shared out asap, sharing is the best way for me to cope because I feel like I'm going a little stir crazy with what the right way forward is. 	<ul style="list-style-type: none"> We are the central pay office for 108 independent retail jewelers across Canada. Our contracts with suppliers state that we guarantee payment. Not sure how we are going to live up to those agreements if this goes for much longer
WHAT CAN BE DONE FOR HELPING	IT'S A SCARY TIME	OTHER	THANK YOU
<ul style="list-style-type: none"> help with how to navigate sponsorship arrangements - e.g. fulfilling their needs My members are medical clinic managers, deeply involved in this crisis. Their association has become more valuable than ever, if there's a silver lining in this crisis. I am gathering and circulating information for them. Our Google Group email forum is always active. It has been on fire lately. Like CSAE is doing, associations have the chance to step up and provide valuable connections and services 	<ul style="list-style-type: none"> Scary times. As a charity, it will be close to impossible for us to ask for donations given the current pandemic. I understand this completely. However, it could likely lead to our non existence. This is a scary time for us all Other than saying, let's hope we can survive, no. Good luck to CSAE! 	<ul style="list-style-type: none"> We serve a number of individuals in a special population who are not members It is a bit premature to know the affects of this virus. If we are in isolation for a long period of time I am sure there will be significant repercussions! I don't really have time for this, but I thought it was important! 	<ul style="list-style-type: none"> Thank for the continuous communications Thanks CSAE for your awesome communications and support to the association community Thanks for reaching out and providing the support and tools we need and anticipate needing to help with this crises. Thank you for taking such a leadership role