

General Session: 9:00 – 10:00 am



Forecasting a Prosperous Future

Garet Turner, *American Society of Association Executives Foundation*

Amidst a swirl of change affecting our associations and businesses, peering 5, 10, 20 years down the path at possible futures is not a luxury but an essential executive competency. While relatively few associations can embark on extensive, multi-year environmental scans to inform their planning, the leaders of all associations can take advantage of readily available resources and practice foresight for the future of their organizations.

Drawing on the ASAE Foundation's ongoing ASAE ForesightWorks research initiative, this professional-development session will connect foresight to planning by familiarizing participants with disruptors identified in the ongoing research and providing an overview of foresight discipline and its application.

The objectives of the session are:

- Raise awareness of disruptors forecast to affect associations.
- Identify both challenges and opportunities that will emerge from these drivers of change.
- Provide participants insight and ideas for how to think about drivers of change in their contexts and to better forecast and make plans around changes and implications that will affect their associations.

The overall session comprises two parts:

1. An opening keynote of 50-55 minutes that will set up why foresight is important, introduce participants to foresight tenets, provide examples of drivers of change identified in the ASAE Foundation research, and outline the framework for working with a driver of change, which we will invite participants to practice in table discussions over lunch.
2. "Topics at Tables" for approximately an hour during the lunch period. Selected "driver of change briefs" will be distributed at tables, with discussions facilitated by DFWSAE members.

Concurrent Sessions: 11:00 am – 12:00 pm



Winning Influence: How to Create a Culture of Innovation to Fight Complacency

Rome Madison, *The Superstar Academy*

Track: Association Operation/Innovation

Achieving and maintaining performance excellence in your association isn't easy or comfortable. It's Hard! For many successful organizations, complacency can easily beset leadership, slowly resulting in loss of member engagement, relevance and ultimately lost revenue. However, associations who adopt the qualities of innovative leadership build a culture that influences members at all levels to lead without a title. In this one-hour session you will learn:

- Identify the dangers of professional complacency and develop strategies to fight it.
- How to leverage the power of first impressions to project leadership influence.
- How to be brutally honest, but not brutal to affect change.
- Develop leadership momentum and influence on peers and executives.



Ready, Set, Engage! Best Practices to Retain & Inspire Association Members

Courtney Ramsey, *Courtney Ramsey Speaks, LLC*

Track: Marketing/Communications/Membership

Intriguing content...networking and relationships...a sense of being part of something bigger. What drives members to stay engaged with professional associations in 2019? How do generational differences and technology come into play? Let Courtney break it down for you! In this interactive session, leaders at every level will gain insight into the three key engagement drivers that are most important to members. Through discussion, polling, and brainstorming, participants will leave empowered with the knowledge they need to formulate a plan and communicate it to their board. Engagement and retention do not have to be frustrating. Let's unpack best practices and get to work!



Strategy Outside of the Plan

Lowell Aplebaum, *CAE, CPF, Vista Cova*

Track: CEO/Executive

In a world where the biggest constant is change and disruption, organizations today need an approach to strategy that will: Create space for leaders to co-create organizational vision before they start crafting a strategic plan Build systems to identify environmental opportunities, challenges, and trends throughout the year rather than in an annual survey Have a laser focus in serving core audiences, knowing their needs and creating best-fit aligned solutions Identify which organizational investments are driving the organization and which are dragging in the pursuit of progress Encourage innovation in value, programming, and experience by allocating resources to piloting new concepts each year This session which present a new approach to each of these five elements, creating learning experiences with practical applications that will incorporate strategy as part of an organization's daily routine.



If You Build It, Will They Come? Lessons Learned from Flipped Classrooms

Andrew Crim, *MD, CHCP, American College of Osteopathic Obstetricians & Gynecologists*

Track: Meetings/Conferences

The flipped classroom is an innovative delivery method where learners spend time outside the classroom learning via online videos or other modules and inside the class learning by doing exercises, projects, or discussions. Sounds easy, right? What do learners think? Will they use it? Is there a best practice? All good questions, most of which are never asked. But, asking these and other key questions can help you avoid common pitfalls when designing a flipped classroom experience. For background information on the flipped classroom, watch this video:

https://youtu.be/qdKzSq_t8k8

Concurrent Sessions: 2:00 – 3:00 PM



You Did What?! A Case Study in Wire Transfer Fraud

Valerie Bakies Lile, CAE, American College of Osteopathic Obstetricians & Gynecologists

Track: Association Operation/Innovation

We all strive to educate staff on the red flags of phishing messages and the myriad of other attempts to defraud. But what happens when the breach occurs outside your organization? When those who are supposed to be your front line defense and your backup in the event of security breach, well.....fail? This session will address these questions and provide valuable insight on the methods of recourse.



Association Programmatic Playbook: Leveraging Your First-Party Data for Marketing & Communications Efforts

Joe Macaluso, MultiView, Inc.

Track: Marketing/Communications/Membership

Industry and trade associations have functioned for decades using traditional best practices to recruit members, grow show attendance and promote CE credits. Now, using a combination of first-party association data, third-party industry data, and programmatic advertising, associations have the power to target members and potential member like never before. Joe uses common strategies and real-world use cases to show you how your data can be the vehicle for highly-targeted marketing and communication efforts. You may think you've read all the books on association marketing, but the book is being rewritten because of one key element: your data.



Volunteer Recruitment and Succession Planning

Brad Shanklin, Dallas HR Management Association

Track: CEO/Executive

Volunteer recruitment is not for the faint of heart! Board recruitment and succession planning is vital to the success of any association and the only thing worse than not having volunteers in place is having the wrong volunteers in place. Jim Collins taught us you not only have to have the right people on the bus, but they MUST be in the right seats. Many associations don't invest the right amount of time and focus on recruiting and placing the best volunteers on their boards and committees, and they don't always position volunteers in the right seat for success but rather in the first open seat available. This session will show proven methods for recruiting the best volunteers for the job and how to create a succession planning process to protect the volunteer process and keep fresh blood coming into the organization. **Learning Objectives:**

- Identify your biggest challenges in recruiting volunteers and how to overcome them
- How to implement a successful year-long volunteer recruitment process
- How and why to implement a succession planning process to keep your boards fresh and prepared for success



Event Safety & Reputation Management

Jeff McKissack, Defense by Design

Track: Meetings/Conferences

What happens offsite and off-the-clock can be just as detrimental to your conference or convention as any potential threat onsite or on-the-clock. How do you better mitigate the risks of violence at your event as well as to attendees of your event whether onsite or offsite? This will be the topic of this presentation.

Concurrent Sessions: 3:15 – 4:15 PM



Communication Conquered: Tools for Connecting with Your Staff, Members and Prospects

Kinsey Mahan, *MemberClicks*

Track: Association Operation/Innovation

The times they are a changin' - particularly in terms of technology. But that's not a bad thing! In fact, with advancements in workplace communication tools, associations can actually streamline - and bump up - their communication efforts.

And that doesn't just apply to internal communications – that spans to member and prospect communications as well!

So what types of tools are we talking about? Tools like Slack, Google Suite, Calendly, and more. In this session, learn how advancements in technology are affecting the workplace, what tools are really taking off, and best practices for using those tools to better communicate with your members, prospects, and staff.



Membership Benchmarking Results Report – How Does Your Association Stack-Up?

Richard Whelan CDM, *Marketing General Incorporated (MGI)*

Track: Marketing/Communications/Membership

Attendees will be the first to hear the preliminary results of the 11th Annual MGI Membership Marketing Benchmarking Report.



Fraud and Internal Control Consideration for Associations

Neely Duncan, CPA, CFE, *BKD, LLP*

Jonathan Blum, *Polsinelli*

Track: CEO/Executive

Learn tips and tricks from various perspectives on the legal/accounting impact on controls in associations. Learn how to better protect your association by implementing these internal controls in accounting, management and board levels.



How to Make Event Changing Decisions Using Data

Dharmesh Dayabhai, *Streampoint Solutions Inc.*

Track: Meetings/Conferences

For this session, we will first review the eco-system as it may be from a technological standpoint. Then we will spend 10 minutes per category for each segment such as marketing, registration, housing, lead retrieval, session, and speaker. to cover each category to a specific idea of what you would do with it currently and how this can be enhanced further with data. And what decisions would be made differently if you had data vs. no data. This will follow with a 10-minute segment for Q&A to personalize the experience a bit further to help attendees share their experiences or clear any thoughts they may have had.

2019 Association Day Breakout Session Schedule



Closing Session: 4:30 – 5:30 PM



Discussion on D&I in Associations

Trevor S. Mitchell, MBA, CAE, *American Mensa and the Mensa Foundation*

Diversity and Inclusion (D&I) is a major topic in both the non-profit and for-profit sectors. While most make efforts to incorporate D&I strategies and initiatives into their organizations, there have been varying levels of success. In this session, we will hear from a couple of Association Executives who are engaging in and working on D&I within their organization. They will share their experience and insight on this topic.