

# 2019 ANNUAL MEETING AND EXHIBITION

Mid-Atlantic Society of Association Executives  
**MASAE**

REACHING THE PEAK OF ASSOCIATION LEADERSHIP

Hard Rock Hotel and Casino  
Atlantic City, NJ

December 11-12, 2019



As a CAE Approved Provider educational program related to the CAE exam content outline, this program may be applied for 7.5 credits toward your CAE application or renewal professional development requirements.



## Message from the MASAE Board of Directors

### Welcome to the Mid-Atlantic Society of Association Executives (MASAE) 2019 Annual Meeting.

We are thrilled to welcome you to Atlantic City and the Hard Rock Hotel & Casino for an all-access pass for two days of education and ample opportunities to reconnect with colleagues and make new friends.

What makes MASAE meetings special are the conversations. They happen all around us – in educational sessions, on the exhibit hall floor, in the hallways, and even at the bar. While MASAE certainly does not have the corner on discussions, it does have the strength that comes from the knowledge that everyone you will talk with at an MASAE event has roots in our community.

A strong network of colleagues, ready to help with ideas and support is here, over the next two days for your taking. Want to meet someone new, and don't know where to start? Approach any member of the MASAE Board and we'll be happy to make a few introductions.

As with any conference of this size, there are a few thank yous to make:

- To MASAE's dedicated program committee whose commitment has brought us a first-class educational program headlined by speakers with national stature.
- To MASAE's passionate exhibitors whose experience has saved us all at one point or another and whose vision our industry continues to benefit from.
- To MASAE's committed staff, who are the glue and have taken on the challenge of guiding an organization of peers with a determination to help take MASAE to new heights.

This year's educational line up is a roster of speakers with a national reputation for their insights as well as their ability to deliver an inspiring and conversation starting message. Our exhibit hall is strengthened by the return of old friends and the return of MASAE's hosted buyer program.

Thank you again for taking time out of your busy schedule to be here with us in Atlantic City. It's going to be a great two days.

Sincerely,  
MASAE Board of Directors



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Kyle Fernley



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# BREAKOUT MEETINGS AT HARD ROCK HOTEL & CASINO ATLANTIC CITY

## LET US HOST YOU...

With 2,000 rooms and over 150,000 square feet of meeting and event space, Hard Rock Hotel & Casino Atlantic City can fill any bill. From intimate board meetings to large scale events and conferences, Hard Rock Hotel & Casino Atlantic City is designed to accommodate groups of all sizes. For the largest gatherings, Hard Rock Live at Etes Arena can stage a general session of 7,000 people or a 300+ booth trade show.

There are 2,000 guest rooms and suites between two hotel towers, a 120,000 square-foot casino floor with 120 table games and 2,200 slots, 20+ restaurants including quick bites to buffet and sit-down dining, two VIP player lounges, lively bars, an indoor swimming pool, 50,000 square ft. fitness center and spa, and retail including two Rock Shops.

Hard Rock Hotel & Casino Atlantic City offers exceptional amenities including a 10-song iTunes playlist upon check-in, a Fender® electric guitar, floor amp and headphones upon room request, as well as a Crosley turntable that includes a carefully curated collection of 10 iconic records in a program known as the Sound of Your Stay®. Our rooms also include free Wi-Fi, LCD TV, cable television, clock radios and hair dryers.

## YOUR EVENT, OUR RED CARPET.

Set on 17-acres, with the legendary Jersey Shore boardwalk as its backdrop, Hard Rock Hotel & Casino Atlantic City has become the go-to meetings destination.

Our 29,000-square-foot Seminole Ballroom divisible into six sections can be configured to accommodate everything from spectacular banquets and corporate events to intimate private concerts. We also have plenty of other space for your breakouts, offices, or whatever you can dream of.

**The Hard Rock Hotel & Casino is offering a room rate of \$69 per night. Please call 609-449-6860 and mention the group code "GAE1219" to make your reservation. Reservations can also be made online at: [www.hardrockhotels.com/atlantic-city](http://www.hardrockhotels.com/atlantic-city).**



# SCHEDULE AT A GLANCE

Tuesday, December 10	
6:30 p.m. – 8:00 p.m.	CEO Discussions Dinner Gordon Ramsey Steak at Harrah's

Wednesday, December 11	
9:30 a.m. – 10:00 a.m.	First Time Attendee Welcome Reception
10:00 a.m.	Exhibit Hall Opens
10:30 a.m. – 10:45 a.m.	Welcome
10:45 a.m. – 12:00 p.m.	Opening Keynote "The Evolving Association Business Model"
12:00 p.m. – 12:30 p.m.	MASAE Business Meeting & Presentation of Awards
12:30 p.m. – 1:15 p.m.	Lunch & Exhibits
1:30 p.m. – 2:30 p.m.	Breakout Session One
	<b>EXECUTIVE:</b> "Getting to Association 4.0: Moving from Strategic Planning to Integrated Strategy"
	<b>ASSOCIATION 101:</b> "Surviving your AMS Migration"
	<b>MEETINGS AND EVENTS:</b> "Cutting Edge Legal Issues for Meetings & Events"
2:45 p.m. – 3:45 p.m.	Breakout Session Two
	<b>EXECUTIVE:</b> "Explicit Content [Strategy] Warning"
	<b>ASSOCIATION 101:</b> "5 Fixes to Boost Online Member Engagement in 2020"
	<b>MEETINGS AND EVENTS:</b> "Negotiating Beyond the Typical Venue Contract"
4:00 p.m. – 5:00 p.m.	Speed Networking Reception with Exhibitors
5:00 p.m. – 6:00 p.m.	Free Time
6:00 p.m. – 8:00 p.m.	MASAE Annual Reception

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## SCHEDULE AT A GLANCE

Thursday, December 12	
8:00 a.m. – 9:00 a.m.	Breakfast & Exhibits
9:00 a.m. – 10:15 a.m.	Opening Keynote: “Strategic Integration”
10:15 a.m. – 11:00 a.m.	Break with Exhibitors
11:00 a.m. – 12:00 p.m.	Breakout Session Three
	<b>EXECUTIVE:</b> “Are You Ready for Strategic Planning?”
	<b>ASSOCIATION 101:</b> “5 Steps to Creating a Data Analytics Program”
	<b>MEETINGS AND EVENTS:</b> “The Marriage of Meetings and Membership”
12:00 p.m. – 1:00 p.m.	Lunch & Exhibits
1:15 p.m. – 2:15 p.m.	Breakout Session Four
	<b>EXECUTIVE:</b> “Gamification: The Future of Member Engagement”
	<b>ASSOCIATION 101:</b> “Association Research Reveals the Stickiest New Member Engagement Programs”
	<b>MEETINGS AND EVENTS:</b> “Meeting Refresh: 3 Areas to Focus on First”
2:15 p.m. – 3:15 p.m.	Closing Keynote: “YESCALATE: Get to Yes Faster using the Brain’s Own Shortcuts”
3:15 p.m. – 3:30 p.m.	Closing Remarks & Door Prize Giveaway





## CONFERENCE SESSION DESCRIPTIONS

### Tuesday, December 10

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6:30 p.m. – 8:00 p.m.

**CEO Discussions Dinner** (Limited to 25 People)  
**Gordon Ramsey Steak at Harrah’s**

Dean West, FASAE and President of Association Laboratory, will present new data on emerging strategies being pursued by associations based on the company’s industry leading environmental scan of the association strategy environment, Looking Forward™. Following this brief presentation, he will moderate a discussion among participants on the value of these strategies to help association deal with a complex and dynamic environment and the potential implications on association structure and governance.

After this session, attendees will be able to:

- Understand emerging strategies associations are pursuing to adapt to a changing environment
- Discuss implications on operations and governance

*Note: This session is for professional members only (not associate members). An additional fee of \$150 will apply for this optional session. The dinner is limited to the first 25 people who register.*

### Wednesday, December 11

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8:00 a.m. – 9:30 a.m.

**Board Meeting**

9:30 a.m. – 10:00 a.m.

**First Time Attendee Welcome Reception**

10:00 a.m.

**Exhibit Hall Opens**

10:30 a.m. – 10:45 a.m.

**Welcome**

10:45 a.m. – 12:00 p.m.

**Opening Keynote:**

*“The Evolving Association Business Model”*

**Speaker: Dean West, FASAE**

Associations operate in a complex and dynamic environment. Knowing what works and will not work moving forward is critical.

This session highlights information collected from more than 200 association CEOs by Association Laboratory through, Looking Forward™, the nation’s most comprehensive and sophisticated environmental scan of the association strategy environment.

The study assesses more than 50 environmental factors in five domains and more than 50 implications on association strategy. From workforce and technology to economic implications and the changing role of government, you will learn about the most substantial factors

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## CONFERENCE SESSION DESCRIPTIONS

impacting association members and how these changes are influencing association membership, meetings, education and government affairs strategy.

For the first time ever, sector-wide data has been collected on more than 30 strategies associations are implementing to successfully adapt to a changing environment to improve Mission-based and business outcomes. Review what your peers in associations believe is essential to success and to position associations for continued growth.

After this session, attendees will be able to:

- Identify key environmental changes impacting association members
- Understand implications on association strategy
- Understand key strategies associations are pursuing to adapt to a changing environment.



**DEAN WEST**

**DEAN WEST** is a global association thought leader and futurist who has spent two decades researching the future of the association business model, the environment facing association members and the implications on association strategy and leadership. His career in the association sector spans a spectrum of experiences ranging from state lobbyist to chief staff officer.

An engaging, provocative and conversational speaker, he understands the unique needs of association leaders working in a complex, dynamic environment. From volunteer leadership to meetings and membership engagement, Mr. West uses the Association Laboratory's peer-based research to outline unique insights, inform and inspire association leaders.

Dean West is the founder and President of Association Laboratory. Association Laboratory specializes in the research and development of association business strategy. The company serves a global client base of leading associations through offices in Chicago, IL and Washington, DC.

Dean West is a Fellow of the American Society of Association Executives. He authored the chapter on Membership Research for the ASAE book, Membership Essentials and the chapter on Marketing Professional Development Programs in the ASAE book, Core Competencies in Professional Development. Mr. West is a former member of the Board of Directors for the Association Forum of Chicagoland, Past Chairman of ASAE's Professional Development Council and past member of ASAE's Membership Council. He is lead researcher on Looking Forward™, the nation's most comprehensive environmental scan of the association environment and Planning for the Meetings of Tomorrow, a technology environmental scan funded by the PCMA Foundation discovering changing uses of technology by meeting planners and attendees.

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## CONFERENCE SESSION DESCRIPTIONS

12:00 p.m. – 12:30 p.m.

12:30 p.m. – 1:15 p.m.

1:30 p.m. – 2:30 p.m.

### MASAE Business Meeting & Presentation of Awards

#### Lunch & Exhibits

#### BREAKOUT SESSIONS

#### EXECUTIVE: “Getting to Association 4.0: Moving from Strategic Planning to Integrated Strategy”

**Speakers: Sherry Budziak, CEO and Founder, .orgSource and Kevin Ordonez, Technology Strategy, .orgSource**

In an era of almost constant disruption, associations need to become more responsive to members’ needs while meeting their ever-increasing expectations. Forward-looking association leaders are re-imagining the 20-year-old strategic planning process and integrating it with the entirety of the organization. In this session, we’ll look at a new approach to strategic planning that meshes the broad direction set by the board with operational plans and resource allocations driven by staff who see the day-to-day realities of the business.

After this session, attendees will be able to:

- Describe and understand the broader market and professional development trends impacting their associations.
- Rethink the traditional strategic planning process to ask the right questions to get to the heart of the organization’s goals.
- Build a plan that takes the organization from strategy to implementation.



**SHERRY BUDZIAK**

Entrepreneur **SHERRY BUDZIAK** is an innovative leader who turns strategy into results through technology. She has more than 20 years of leadership and executive consulting experience helping organizations achieve their digital transformation by improving operational efficiencies and member experiences, identifying opportunities for innovation and new product development, and aligning resources to support strategic and integrated plans. In 2005, Sherry founded .orgSource, a strategy, technology and communications consulting firm that has served more than 100 associations and nonprofits in Chicago and beyond to ensure clients’ long-term success, relevancy and growth. Sherry also is co-founder and managing director of .orgCommunity, an organization for association leaders and industry suppliers to connect and participate in relevant education and dynamic discussions with peers on topics impacting the nonprofit, association profession and other member-based organizations.



## CONFERENCE SESSION DESCRIPTIONS



**KEVIN ORDONEZ**

For more than two decades **KEVIN ORDONEZ** has been dedicated to serving the association community as a vendor partner, volunteer, speaker, author and consultant. Throughout his career he has focused on leveraging all things digital to advance the cause of associations, helping them integrate strategy, manage change and use technology to achieve their objectives.

As .orgSource's technology lead, Kevin works with clients to envision their digital future and then guides them through the process of achieving the vision. Whether developing a digital strategy, creating a multi-year technology roadmap, focusing on a specific system implementation, or undertaking a performance improvement project, Kevin draws upon insights that can only come from someone who has the hands-on experience of working for an association, as well as the entrepreneurial spirit of a founder of leading association management software companies. In total Kevin has served 1,000s of associations, providing technology insight, product development, implementation methodologies and strategic planning.

Along with .orgSource founder and CEO Sherry Budziak, Kevin is the co-founder of .orgCommunity, an organization that provides hand-crafted connections, inspiration and solutions to association leaders and industry suppliers through education programs, networking events and a robust online community.

Kevin is an active participant in the association community, having served on the Association Forum of Chicagoland board of directors and on various volunteer committees. He frequently serves as a thought leader, lending his expertise to a variety of organizations. He also serves as an advisor to Work XO which helps companies measure, analyze and activate their organizational culture.

### **ASSOCIATION 101: "Surviving your AMS Migration"**

**Speaker: Kim Russell, Data Operations Manager, Society of Hospital Medicine**

This session will review tips for making the most of your association's move from one Association Management System to another.

After this presentation, attendees will be able to:

- Understand real-world strategies for navigating an AMS switch.



## CONFERENCE SESSION DESCRIPTIONS



**KIM RUSSELL**

**KIM RUSSELL** joined the Society of Hospital Medicine in January, 2012. As SHM's Data Operations Manager, she collaborates with different departments about the best uses of the data and marvels at how many ways people can abbreviate the word hospital.

This is her first position with an association; however, she spent 12 years in the online department of a different type of non-profit commonly called a "local newspaper."

Kim graduated from Rowan University with a BA in Communications. She is a member of MASAE and ASAE. She's a proud resident of New Jersey and finds the tidy rows and columns on spreadsheets oddly comforting.

### **MEETINGS AND EVENTS: "Cutting Edge Legal Issues for Meetings & Events"**

**Speaker: Joshua Grimes, Esq.**

Legal Weed; GDPR; AirBnb; Crisis Planning; Guns in Meetings -- Constant global change means changes for meetings. Controversy in Washington and threats of terrorism discourage attendees from traveling. GDPR imposes tough data protection laws that restricts use of personal information. AirBnb and other "Sharing Economy" businesses create havoc for hotel room blocks and increased risks. And societal changes like legal marijuana and increased acceptance of guns can affect a meeting host's liability.

Without a Crystal Ball it's tough to plan for these changes. Yet solid planning is what successful planners and suppliers must do.

This fast-paced and interactive presentation will identify the most recent and critical developments to impact meetings in 2019 and beyond. Topics will include:

- Marijuana usage & guns in meetings.
- Combatting sexual harassment and other improper conduct.
- Cancellation for Force Majeure occurrences and objectionable social legislation.
- AirBnb and other "sharing economy" businesses.
- GDPR data protection and online security.

We will discuss the creative and innovative legal responses meeting professionals should consider now, to allow events to go forward successfully with minimal risk.



## CONFERENCE SESSION DESCRIPTIONS



**JOSHUA L. GRIMES,  
ESQ.**

**2:45 p.m. – 3:45 p.m.**

**JOSHUA L. GRIMES, ESQ.**, Attorney at Law, Grimes Law Offices, LLC, based in Philadelphia, is a leading attorney in the association, nonprofit, meeting, and hospitality industries. He is a specialist in all matters relating meetings and conventions, as well as association & nonprofit governance.

Mr. Grimes' expertise includes preparing and negotiating all types of meeting industry contracts. He also advises clients on avoiding liability risks. In addition, many organizations rely on Mr. Grimes to aggressively represent their interests when disputes arise, including in litigation, mediation, and other resolution procedures.

### **BREAKOUT SESSIONS**

#### **EXECUTIVE: "Explicit Content [Strategy] Warning"**

In Looking Forward™, the nation's most comprehensive scan of the association business environment, 53% of association chief staff officers indicated they were pursuing content strategies to improve information impact and 85% were creating more robust content.

From thought-leadership strategies to content-based revenue models, Content Strategy is the most innovative tool being pursued by professional societies to create deeper, more meaningful relationships with members to improve Mission impact and business results.

This presentation, built on research into association content strategy, lessons highlighted at the recent Association Laboratory Content Strategy Summit and case studies from professional societies will introduce best practices in creating, sustaining and monetizing content strategy.

#### Educational Objectives

- Understand the business rationale for content strategy.
- Identify the principal challenges facing successful content strategy
- Identify solutions to effectively creating and sustaining successful content strategy

#### **Speaker: Dean West**



**DEAN WEST**

**DEAN WEST** is the founder and President of Association Laboratory. Association Laboratory specializes in the research and development of association business strategy. The company serves a global client base of leading associations through offices in Chicago, IL and Washington, DC.

Dean West is a Fellow of the American Society of Association Executives. He authored the chapter on Membership Research

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## CONFERENCE SESSION DESCRIPTIONS

for the ASAE book, Membership Essentials and the chapter on Marketing Professional Development Programs in the ASAE book, Core Competencies in Professional Development. Mr. West is a former member of the Board of Directors for the Association Forum of Chicagoland, Past Chairman of ASAE's Professional Development Council and past member of ASAE's Membership Council. He is lead researcher on Looking Forward™, the nation's most comprehensive environmental scan of the association environment and Planning for the Meetings of Tomorrow, a technology environmental scan funded by the PCMA Foundation discovering changing uses of technology by meeting planners and attendees.

### **ASSOCIATION 101: "5 Fixes to Boost Online Member Engagement in 2020"**

**Speaker: John Hooley, President, Resurgent**

Your website is the 24/7 representative of your association. However, most associations make mistakes that frustrate members and hurt retention. Designed for the busy executive director, marketing, and communication staff, you'll discover exactly what to do to improve your member experience online. This session includes 2 peer-to-peer learning opportunities where participants are challenged to work together to apply the ideas and share their analysis with their peers.

After this presentation, attendees will be able to:

- Execute a 3-minute test to get actionable feedback on what on your website is hurting your association.
- Understand the 2 most common mistakes associations make creating an intuitive experience.
- Learn a simple fix that led to a 2x increase in engagement and 750,000 new visitors annually.



**JOHN HOOLEY**

**JOHN HOOLEY** is the President of Resurgent, a digital agency that helps associations improve recruitment, retention, and non-dues revenue. He's a Zend Engineer for PHP, a Certified Customer Acquisition Specialist, a graduate of Goldman Sachs 10,000 Small Businesses, and a Marine Corps veteran.

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## CONFERENCE SESSION DESCRIPTIONS

### MEETINGS AND EVENTS: “Negotiating Beyond the Typical Venue Contract”

#### Speaker: Panel

Negotiating a hotel or convention center contract with the most favorable terms for the organization is job one for a business event strategist. The property sales team, on the other hand, wants to get the best deal for the venue. In today’s climate of evolving market conditions and new risks, some negotiations can be intense. In this role-play session, individuals from both sides of the table negotiate sensitive clauses, and a panel of subject matter and legal experts offer their expertise.



**HEATHER SEASHOLTZ, CMP**

- **HEATHER SEASHOLTZ, CMP**, Director, Meetings & Events, Talley Management Group, Inc. - Since 2000, Heather has been in the meeting and event management industry on both the supplier partner and client sides of our industry. She has planned meetings in healthcare, scientific, corporate and not for profit environments. She is a Certified Meeting Professional and is a finalist for the 2019 Business Event Strategist of the Year award from Professional Convention Management Association (PCMA).



**JOSHUA L. GRIMES, ESQ.**

- **JOSHUA L. GRIMES, ESQ.**, Attorney at Law, Grimes Law Offices, LLC - Joshua L. Grimes, Esq., of Grimes Law Offices based in Philadelphia, is a leading attorney in the association, nonprofit, meeting, and hospitality industries. He is a specialist in all matters relating meetings and conventions, as well as association & nonprofit governance.

Mr. Grimes’ expertise includes preparing and negotiating all types of meeting industry contracts. He also advises clients on avoiding liability risks. In addition, many organizations rely on Mr. Grimes to aggressively represent their interests when disputes arise, including in litigation, mediation, and other resolution procedures.

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## CONFERENCE SESSION DESCRIPTIONS



**JACKIE KAVCAK**

- **JACKIE KAVCAK**, Director of Sales Meetings & Conventions US, Tourism Vancouver - Jackie Kavcak started her career in her hometown New Orleans with United Exposition Services (now GES) where some of her key clients were the NCAA Final Four and the NFL Superbowl. Jackie's move to Washington, DC, began her career in the Destination Marketing Organization (DMO) world with the New Orleans Convention & Visitors Bureau. After a couple of years of selling her hometown in her newly adopted city, she accepted a position with Tourism Vancouver, where she is currently the Director of Sales, Meetings & Conventions, US, and celebrated her 19th year with Tourism Vancouver in April. Jackie has exceeded sales results, proven strategic leadership experience and is passionate about promoting Vancouver. One of her biggest career accomplishments was leading the Vancouver community in securing a 55,000-person meeting, coming soon in 2025.



**ROBERT SMITH**

- **ROBERT SMITH**, Director of Meetings, AERA  
Robert Smith, CMP, CMM is the Director of Meetings for the American Educational Research Association. He has more than 20 years in the meetings industry with both associations and corporate organizations designing and executing meetings and events from small executive board meetings to 17,000 person city-wide annual meetings. Has spent the last seven years focused on the design of content and facilitation curriculum. In 2017, he was the chair of PCMA Education Conference, and served on the 2019 PCMA Convening Leaders Content Committee. Also, serves as a faculty member for the MPI Potomac Chapter's CMP Study Group.

4:00 p.m. – 5:00 p.m.

### **Speed Networking Reception with Exhibitors"**

Join our exhibitors for a speed networking reception featuring passed wine and hors d'oeuvres. For each vendor an attendee visits, they will receive a red raffle ticket. The more vendors you visit, the more tickets you will receive for a chance to win a \$250 Amazon Gift Card.

6:00 – 8:00 p.m.

### **Reception**

## **Thursday, December 12**

8:00 a.m. – 9:00 a.m.

### **Breakfast**

9:00 a.m. – 10:15 a.m.

### **Opening Keynote: "Strategic Integration"**

#### **Speaker: Gabriel Eckert**

Organizations spend countless dollars and time creating strategic plans. Why is it, then, that so many fail? This interactive session will

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**GABRIEL ECKERT**

explore tips, tools, and techniques to move beyond strategic planning and transform your organization. Based on research and case studies, the session will provide insight on essential elements for implementing organizational strategy.

**GABRIEL ECKERT, FASAE CAE**, serves as the Chief Executive Officer of the Building Owners and Managers Association of Georgia. He is a past chair of the Certified Association Executive (CAE) Commission and is also a past chair of the Georgia Society of Association Executives Foundation. He has been named a Fellow by the American Society of Association Executives (ASAE) and as one of the Top 40 Under 40 in Association Management by USAE and the Association Forum of Chicagoland. Gabriel is also a nationally recognized strategic planning facilitator, board governance consultant, and speaker. Additionally, Gabriel is co-author of two of ASAE’s most popular books, “From Insight to Action: 6 New Ways to Think, Lead and Achieve” and “Strategic Integration: Tips, Tools, and Techniques to Move Beyond Strategic Planning and Transform Your Organization.”

**10:15 a.m. – 11:00 a.m.**

**11:00 a.m. – 12:00 p.m.**

### **Break with Exhibitors**

### **Breakout Sessions**

#### **EXECUTIVE: “Are You Ready for Strategic Planning?”**

**Speakers: Karen Silberman, CAE, Executive Vice President, American Chiropractic Association & Ray Tuck, Past President, American Chiropractic Association**

A strategic plan is one of the most important documents within an organization, second only to the bylaws and governance documents. The strategic plan is a roadmap to guide your organization, it safeguards the organization from changing direction with every new leader, provides the framework for the annual budget, and ensures alignment between committees, volunteers and organizational goals. Strategic planning is also one of the most time consuming and expensive projects an organization undertakes. This session will explore how to determine a strategic plan scope of work, preparing board and staff, logistical considerations and keys to operationalizing the strategic plan, including identifying key performance indicators and dashboard metrics. The session will be led by an Executive Director and board President, providing the concurrent vantage point of staff and volunteer leader.

After this presentation, attendees will be able to:

- Make the case to their volunteer leaders that investing in a strategic planning effort will advance the organization and its mission.
- Plan for a strategic planning initiative including a drafting a project

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## CONFERENCE SESSION DESCRIPTIONS

timeline and identifying appropriate staff and volunteers to lead the effort.

- Identify key performance indicators and draft an organizational dashboard.



**KAREN SILBERMAN**

**KAREN SILBERMAN** serves as the executive vice president of the American Chiropractic Association. She came to ACA with a history of driving organizational change, creating performance oriented cultures and driving membership growth and value. Prior to the ACA, she served as executive director of the Federal Bar Association (FBA), where she eliminated a budget deficit, significantly increased membership and doubled program revenues. Before FBA, she served as executive director at both the Society of Human Resource Management Foundation and the National Coalition for Promoting Physical Activity.

Karen graduated from Indiana University with a master's degree in Public Affairs. She also holds a bachelor's degree in Sociology from Oberlin College. In addition, she earned a Certified Association Executive (CAE) credential and served as the chair of the Friends of the National Zoo.



**RAY TUCK**

**RAY TUCK** served as the President of the American Chiropractic Association (ACA) from 2017-18. His experience at the ACA includes serving as strategic planning and finance chair. He was instrumental in the development of the association's strategic plan. He led the organizational restructuring initiative which included a complete overhaul of governance, recruiting and onboarding a new executive and an organizational rebrand.

In addition to his roles at the ACA, he serves as Vice President of the Virginia Board of Medicine and as President of Tuck Chiropractic Clinic, a ten clinic regional system providing chiropractic care throughout southwest and central Virginia.

Tuck is a graduate of Radford University with a BS in Physical Sciences and received his Doctor of Chiropractic degree from the National University of Health Sciences

### **ASSOCIATION 101: "5 Steps to Creating a Data Analytics Program"**

**Speaker: Heidi Weber, MBA, CAE, Executive Director, Alpha Omega Dental Fraternity & Katherine Matthews, CAE**

Associations have data. Whether it is membership, program, advocacy, or financial, reports are generated by various data management systems for the board of directors and cohorts to review. Although Excel spreadsheets work fine, there are more robust methods to share data.

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## CONFERENCE SESSION DESCRIPTIONS

Organizations with limited resources may not realize that there are free and inexpensive tools to package data in more digestible and attractive reports. Building a data analytics program is essential to communicating today and tomorrow’s information. A data analytic program does not have to be complicated. The speakers will guide a discussion about how to build a program to effectively harness the organization’s data.

After this presentation, attendees will be able to:

- Understand the fundamentals needed to start an analytics program.
- Learn about the available tools on the market.
- Apply the suggestions and tools to their own situation.



**HEIDI WEBER,  
MBA, CAE**

**HEIDI WEBER, MBA, CAE**, is the visionary leader and facilitator of the Alpha Omega International Dental Fraternity (AO) located in Rockville, Maryland. AO is the oldest dental and medical organization with 5,000 international members in 10 countries. As the Executive Director, she has been a change agent and has championed mission driven programs to benefit the members and healthcare community.

With more than 15 years’ experience in nonprofit and corporate organizations, Heidi has provided leadership and strategic management to both professional and trade societies and their members and boards.

Heidi is a member of the American Society of Association Executives (ASAE), American Association of Medical Society Executives, (AAMSE), Association Forum of Chicago, and the Nonprofit Technology Network (NTEN). Heidi earned her Certified Association Executive (CAE) designation from ASAE in January 2017 and is a member of the ASAE Technology Council.



**KATHERINE  
MATTHEWS, CAE**

**KATHERINE MATTHEWS, CAE** is a Business Intelligence Analyst for the National Council of Architectural Registration Boards and a passionate data evangelist. In her work for NCARB, she helps the team to find and leverage insights in their data while supporting a self-service approach to analytics. Katherine is also a volunteer leader for two area user groups and is currently serving on ASAE’s Technology Section Council.

### **MEETINGS AND EVENTS: “The Marriage of Meetings and Membership”**

**Speakers: Nicole Ratner, CAE, CMP, Owner, The Next Steps, LLC & Dan Ratner, Membership and Business Development Strategist**

Meetings are at the heart of the membership value proposition while members are at the core of a successful meeting. Learn how these two significant areas of associations work synergistically to

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## CONFERENCE SESSION DESCRIPTIONS

drive organizational growth. This session will look at the In It ForEVER Principle which focuses on the four major needs of members and attendees: experience, value, engagement, and relevance.

After this presentation, attendees will be able to:

- Understand strategies and techniques for collaboration between meetings and membership stakeholders.
- Gain ideas and activities to implement at meetings and conferences to support membership development.



**DAN RATNER**

**DAN RATNER** has more than 20 years as an association professional and has specialized in membership development and retention at all levels rising to executive levels of both professional and trade associations. All of these organizations achieved records in membership growth during his tenure. The size of these organizations range from 1,200 members to 175,000 and operating budgets of up to \$60 million. His experience includes leading membership development, constituent relations, customer service, and direct sales teams. In several cases, Mr. Ratner pioneered and championed the use of social media and online meeting platforms for membership development purposes. He regularly took on the role of change agent for the culture within these organizations advocating for membership to be at the core of the overall business model.



**NICOLE RATNER,  
CAE, CAMP**

**NICOLE RATNER, CAE, CMP** has over 18 years of experience in association management with expertise in meeting and event planning, educational programming, board and committee relations, communications, and more. She is a former Executive Director of a national association where she handled the day-to-day operations, membership, marketing, meetings, and education.

She is a graduate of George Mason University with a BA in communications and previously worked for NBC4 in Washington in the Entertainment field with Arch Campbell. She formally began her association management career working for the Fairfax Bar Association and later the American Bar Association as a Meetings Coordinator. Mrs. Ratner has also served as Director of Public Relations for a law firm in Washington, DC where she was responsible for client relations, marketing and all PR for the firm founder.

12:00 p.m. – 1:00 p.m.

1:15 p.m. – 2:15 p.m.

**Lunch & Exhibits**

**BREAKOUT SESSIONS**

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## CONFERENCE SESSION DESCRIPTIONS

### **EXECUTIVE: “Gamification: The Future of Member Engagement”**

**Speaker: Willis Turner, CEO, Old Clayburn Marketing & Management Services Inc.**

Gaming is the first mass media of the 21st century. By learning how to carefully and intentionally utilize gaming techniques you can increase loyalty, enthusiasm and engagement. Implementing content from this session, professional staff and volunteers can amplify intrinsic and extrinsic motivation, and build responsive frameworks that are memorable, fun and rewarding for all participants. Explore how thinking differently about your members can create new opportunities for leading, learning and living! Leave with practice ideas on how to use Gamification in strategic planning, volunteer achievement, certification programs, membership recruitment and membership retention!

After this presentation, attendees will be able to:

- Learn three key areas where Gamification can be implemented: Events, Education and Membership
- Develop a comprehensive gaming framework for your organization
- Implement a simple gaming concept for your next event.



**WILLIS TURNER,  
CAE, CME, CSE**

**WILLIS TURNER, CAE, CME, CSE**, is President of Old Clayburn Marketing & Management Services Inc, a full service association management firm. Willis also serves as Chief Executive Officer of USA based Sales & Marketing Executives International (SMEI). Under his leadership, SMEI has broadened its scope to establish operations in China, Europe, Mexico, Japan, Vietnam and the Middle East. As a keynote speaker on professional certification, gamification and leading edge sales and marketing topics, Willis leverages his worldwide business travel and association management experiences to convey an informative and motivating message to his audiences. Willis is co-author of “42 Rules for Engaging Your Members Through Gamification,” the definitive guide for associations on this leading edge topic. He serves on the National Advisory Board for DECA Inc. and is a past advisory board member of Kaplan University and the Graduate School of Sales & Marketing Management at Syracuse University. Willis is an instructor in Sales Management at the University of British Columbia, Sauder School of Business and regularly teaches sales management and marketing classes in China, Europe and the Middle East and has been a visiting lecturer at international universities including the Sun Yat Sen EMBA program. Willis resides near Vancouver, British Columbia, Canada.

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## CONFERENCE SESSION DESCRIPTIONS

### **ASSOCIATION 101: “Association Research Reveals the Stickiest New Member Engagement Programs”**

**Speaker: Amanda Kaiser, Member Engagement Consultant, Kaiser Insights, LLC**

Do your new members renew at a far lower rate than other members of your association? If this is true, you are not alone as new members tend to be the most at-risk members for associations.

Would you like to see how associations improved their new member renewal rates by 9.7%? Dynamic Benchmarking and Kaiser Insights LLC teamed up to conduct the New Member Engagement Study. The mixed-method research explores the new member onboarding, welcoming, and orientation habits of over 160 associations. The research revealed that no matter the type, size or focus of your association a new member engagement program can work for you!

In this session, we will share many new and exciting insights from the research including the 4 strategies the best new member onboarding programs rely on. Participants will see which tactics work best along with implementation tips and leave with a step-by-step process you can bring back to the office.

After this presentation, attendees will be able to:

- Learn how to create a new member engagement program your members will love.
- Understand the key changes you can make to radically improve an existing onboarding, welcoming, or orientation program.
- Hear about the link between these underused but critical programs and overall member engagement.

**AMANDA KAISER** learned strategic marketing at Crayola, then went agency-side in the advertising world, and ultimately landed in her beloved association community where she is a member engagement consultant and keynote speaker.



**AMANDA KAISER**

Amanda has worked with dozens of associations large and small, most recently for the International Council on Systems Engineering where leadership is currently using the member research she conducted to increase member engagement. She is like an expedition leader for the association industry with her vast data set, and ability to sift through complex issues to find simple, successful actions.

Many membership organizations are facing decreasing memberships, engagement, or participation. Amanda helps association professionals

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slice through the clutter to see the solutions that will have the most significant outcome for their association. Amanda loves this work because associations have the power to improve their member's careers and workplaces, so she tells research-backed stories about the issues that matter most to associations and their members.

**MEETINGS AND EVENTS: "Meeting Refresh: 3 Areas to Focus on First"**

**Speakers: Sabina Gargiulo, Vice President of Industry Relations at AH, Beth Mauro, Senior Director of Client Services, Association Headquarters, Inc. & Brooke Passy, CMP, Meeting Manager, Association Headquarters, Inc.**

Guiding committees and association leadership can be wary of making too many changes to an event that seems to be running smoothly, yet attendees say they want to see something fresh every year. How can you make your meeting feel new while keeping your core deliverables intact and budget under control? In this session, AH Meetings and Industry Relations professionals will give examples of how you can upgrade the experience by focusing on these important three important meeting functions

After this presentation, attendees will be able to:

- Identify new technology products that facilitate audience interaction.
- Learn how new education formats, spaces and learning circles offer new ways to consumer content.
- See how new sponsorships can turn a static industry relations program into one that drives engagement for sponsors and attendees.



**SABINA GARGIULO**

**SABINA GARGIULO** is currently the Vice President of Industry Relations at AH. In this role, Sabina leads and oversees AH's Industry Relations department; a highly specialized team of rainmakers responsible for developing strategic sponsorship sales programs for AH client partners. She is also an active member of AH's new business development team, sharing responsibility for achieving AH corporate growth goals, and an integral member of the company's senior leadership team, contributing to the company's overall organizational advancement.

Sabina is also an experienced and knowledgeable conference producer with more than a decade of real-world experience in both the public and private sectors. Formerly with the Institute of International Research (IIR), one of the largest conference management companies in the world, Sabina designed and produced business conferences for Fortune 500 and 1,000 companies on an array of subjects, targeting diverse industries and sectors for both B2B and B2C.



**BETH MAURO**

**BETH MAURO** joined AH in 2015, bringing 25+ years of association, meetings, publication and marketing management skills to the table. As Senior Director of Client Services, Beth is dedicated to creating high functioning teams that deliver superior service to client partners. Among her duties are segment leadership for the Corporate and Entrepreneurial verticals and liaison to AH's team of 30+ meeting professionals. She also manages the annual AH Leadership Forum and is co-chair of the AH Foresight Committee.

Throughout her career, Beth has specialized in launching and reinventing meetings. At AH, she worked with the Commission for Case Manager Certification to launch the CCMC New World Symposium and led the relaunch of the JPMA Show, a hybrid event for suppliers and expectant parents presented by the Juvenile Product Manufacturers Association.



**BROOKE PASSY, CMP**

**BROOKE PASSY, CMP** is now serving her 5th year as the Meeting Manager for the Wound, Ostomy and Continence Nurses Society (WOCN). She has been a part of the WOCN and AH meetings team at AH for twelve years and has worked in all areas of the meeting planning process.

Brooke is also involved in the AH Social Responsibility Committee and the GPPCMA Community Service Committee, allowing her to help give back to the community, something that she is very passionate about.

Brooke's dedication to customer service and execution of events comes from her varied professional background of multiple years working in the food industry and experience in the performing arts. Brooke has a Bachelor of Fine Arts in Theater and believes that running an on-site event is just like a show; everyone must roll up their sleeves and work together for a seamless experience for the attendee/ audience. No matter what, Brooke always knows that "the show must go on!"

**2:15 p.m. – 3:15 p.m.**

**Closing Keynote:**

**"YESCALATE: Get to Yes Faster using the Brain's Own Shortcuts"**

**Speaker: Dean Minuto**



**DEAN MINUTO**

Award-winning Speaker **DEAN MINUTO** presents a summary course in brain science and behavioral psychology to help you get to yes faster with anyone, anyplace, anytime. Dean has been called The One Page Sales Coach® for his unique ability to present massively distilled summary courses for CEOs and Executives with single-sheet tools that they can use immediately to Get to Yes Faster. Every Member and Attendee needs to get to YES, whether alone or with their Team—and this keynote presents a unique set of tools distilled from more than 100 years of research in the decision sciences and applied directly in Dean's work with more than 35,000 executives in the last 27 years.

**3:15 p.m. – 3:30 p.m.**

**Closing Remarks & Door Prize Giveaway**



Costs:	Before November 15	After November 15
MASAE Members	\$250.00	\$300.00
Non-Members	\$300.00	\$350.00
CONFERENCE ADD-ON CEO Dinner Discussion (Dec. 10)	Professional Members Only: \$150.00	

**REGISTRATION INFORMATION:**

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
 Please list any special dietary or disability needs: \_\_\_\_\_  
 \_\_\_\_\_

Membership Information:  MASAE Member  Non-Member  
 What breakout session track do you plan to attend?  Executive  Association 101  Meetings & Events

**CONFERENCE ADD-ON: CEO Dinner Discussion ( Dec. 10)**  
**Professional Members Only: \$150.00 per person**  I will attend  I will not attend

**PAYMENT INFORMATION:**

Please make checks payable to MASAE  
 Check in the amount of: \$ \_\_\_\_\_  
 Charge \$ \_\_\_\_\_ to my:  Visa  Master Card  AMEX  
 Card Number: \_\_\_\_\_ CCID: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
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*Cancellations must be in writing and made no later than November 29, 2019.*

**Please return form with payment to:**  
**MASAE**  
**P.O. Box 518**  
**Mount Laurel, NJ 08054**

**Or by fax: 856-727-9504**  
**Or register online @ [www.midatlantic-sae.org](http://www.midatlantic-sae.org)**  
**Questions: 267-597-3818**