Mid-Atlantic Society of Association Executives

MASAE

ANNUAL CONFERENCE - **2020**

NOVEMBER 3 - 19

REBUILDING, RESTORING, REINVENTING:
CREATING THE NEW NORMAL

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ESSENTIALS TRACK	MEETINGS & EVENTS TRACK	EXECUTIVE TRACK
TUESDAY NOV 3	**WEDNESDAY NOV 4**	**THURSDAY NOV 5**
1:00 – 1:30 p.m. **MASAE Opening Remarks & Annual Meeting** **1:30 – 2:30 p.m.** *Opening Keynote* *If All Lives Matter, Then Why Are We Here?* sponsored by: MEET AC Atlantic City **3:00 – 4:00 p.m.** Essentials Session 1 *Board Governance Fundamentals*	**3:00 – 4:00 p.m.** **Meetings & Events Session 1** *Lessons Learned in the 11th-hour Pivot to Virtual Meetings* **4:00 – 5:00 p.m.** *Happy Hour* sponsored by: BROWN DOG MARKETING	**3:00 – 4:15 p.m.** **Executive Session 1** *Financial Modeling* sponsored by: AH
TUESDAY NOV 10	**WEDNESDAY NOV 11**	**THURSDAY NOV 12**
3:00 – 4:15 p.m. **Essentials Session 2** *The Rise (and need) of Mentorship and How to Create a Successful Program*	**3:00 – 4:15 p.m.** **Meetings & Events Session 2** *Expo Central: Make Your Exhibit Hall THE Place to Be*	**3:00 – 4:00 p.m.** **Executive Session 2** *Tips for Developing your Strategic Plan Virtually* **4:00 – 5:00 p.m.** *Happy Hour* sponsored by: OnBoard Board Management Software
TUESDAY NOV 17	**WEDNESDAY NOV 18**	**THURSDAY NOV 19**
3:00 – 4:15 p.m. **Essentials Session 3** *Contracts in the Era of COVID-19*	**3:00 – 4:00 p.m.** **Meetings & Events Session 3** *And the Award E-Goes to…* **4:00 – 5:00 p.m.** *Happy Hour* sponsored by VISTA CONVENTION SERVICES	**3:00 – 4:00 p.m.** **Executive Session 3** *Beyond Covid 19: Identifying and Addressing Today's & Tomorrow's Critical Issues* **4:00 – 5:00 p.m.** *Closing Keynote: Leading Change in the 21st Century*

Tuesday, November 3

1:00 – 1:30 p.m.

MASAE Opening Remarks & Annual Meeting

1:30 – 2:30 p.m.

Opening Keynote: If All Lives Matter, Then Why Are We Here?

sponsored by

MEET AC

Atlantic City

The brutal killing of George Floyd by a Minneapolis police officer on May 25, 2020 resulted in worldwide #BlackLivesMatter protests and renewed calls for robust police reform and eliminating systemic racism. Similar to the swift backlash that occurred with previous protests, a large segment of Americans still refuse to acknowledge the presence and pain of systemic racism and injustices and proudly retort #AllLivesMatter. Despite this divide, several organizations released statements in support of #BlackLivesMatter, but few of them ever go beyond this point, which is indicative of performative activism and allyship. This talk will explore the themes that undergird the #BlackLivesMatter Movement and offer some ideas to help people move from a performative activism and allyship to authentic activism and allyship.

Oscar Holmes IV, Ph.D.

Oscar Holmes IV, Ph.D. is the founder and CEO of WHConsulting Firm LLC and creator and host of Diversity Matters podcast which premiered in 2020. Additionally, he is an Associate Professor of Management, Associate Dean of Undergraduate Programs, and Director of Access and Outreach for Business Education at Rutgers School of Business-Camden where he teaches executive education, graduate, and undergraduate courses in Leadership and Managing Human Capital, Organizational Behavior, Conflict Resolution and Negotiation, and Crisis Management. His research examines how leaders can maximize productivity and well-being through fostering more inclusive environments and has been published in several top-tier management journals and books. He earned a Ph.D. and M.A. in Management at The University of Alabama, M.L.A. from The University of Richmond and a B.S. with honors from Virginia Commonwealth University.

He is also a 2006 alum of Stanford University's Graduate School of Business Summer Institute in General Management. While on sabbatical in fall 2016, he was a Visiting Research Professor of Management at the LeBow College of Business at Drexel University and a Research Fellow at the University of Pretoria (South Africa). He is a resident expert for Psychology Today (PT) and hosts his own PT column entitled, "Beyond the Cubicle: Managing Human Capital." He has won numerous awards for his scholarship and teaching such as being named one of Poets & Quants 40 Under 40 Best Business School Professors in the world, Philadelphia Business Journal 40 Under 40, and won the Mid-Atlantic Association of College of Business Administration Innovation in Teaching Award, the New Jersey Policy Research Organization Foundation Bright Idea Research Award, and the Rutgers University Leaders in Faculty Diversity Award. In 2018, he created and hosts, Beyond the Mill, a 6-episode Diversity Dialogues Talk Show at Rutgers-Camden. In addition to his scholarship being covered in various news outlets, he is a highly sought-after speaker, organizational consultant, and has made several media appearances that include Huffington Post Live, television, and radio interviews.

Tuesday, November 3
3:00 - 4:00 p.m.
ESSENTIALS TRACK - SESSION 1
Board Governance Fundamentals

Are you currently serving as a Board member of an association or considering Board service? This presentation will provide you with the fundamentals of what it takes to be a good Board member. We will dive into the responsibilities of a Board member while discussing fiduciary duties and any protections available to a Board member. We will also discuss how to measure the effectiveness of a Board and tips for improving the overall success of the Board.

Learning Objectives:
- Understand what Board governance is and the role of the Board and the individual Board member.
- Learn about fiduciary duties and avoiding conflicts of interest.
- Examine indemnification and other protections against liability.
- Hear about different types of Boards and how to measure Board effectiveness.
- Determine what makes a successful Board.

Kayci Petenko

Kayci Petenko is a founding partner of Fleming Petenko Law where she focuses her practice on advising a variety of tax-exempt organizations, including private foundations, public charities, and donor-advised funds.

Immediately prior to forming Fleming Petenko Law, Kayci worked for another boutique law firm providing legal advice and services to nonprofit organizations. Additionally, she was a tax associate in the Tax Advisory Group of an accounting firm, where she provided clients with a wide range of tax consulting services and specialized in state and local taxation. Kayci also has significant law firm experience representing clients in corporate, financial, real estate, and litigation matters. She has advised clients on compliance issues, corporate governance matters, and contract negotiation.

Kayci speaks frequently on legal matters related to the operation of nonprofit organizations and is an adjunct professor at Villanova University Charles Widger School of Law. In her free time, she enjoys traveling, baking, and volunteering at several nonprofits in her local community.

Noel Fleming

Noel Fleming is a founding partner of Fleming Petenko Law where he focuses his practice on serving the legal needs of nonprofit organizations primarily in the areas of corporate law and governance, charitable trusts, federal, state and local tax matters, fiduciary duties, charitable fundraising, and related matters.

He regularly acts as outside general counsel to a variety of nonprofit organizations including publicly supported charities, private foundations, trade associations, social service providers, educational institutions, and health care facilities. In this capacity, he advises these organizations on all manner of issues affecting nonprofit organizations including corporate formation and qualification for tax-exempt status, federal tax law compliance, nonprofit mergers and acquisitions, strategic alliances, corporate governance matters, charitable contribution issues, and unrelated business income tax questions.

Noel is active in the Pennsylvania nonprofit community and is a former Chair of the Pennsylvania Bar Association's Charitable Organizations Committee. He is an adjunct professor at Villanova University Charles Widger School of Law and writes and speaks frequently on legal matters related to the operation of nonprofit organizations. He has been recognized by his peers as a Super Lawyer in the field of nonprofit law.

Wednesday, November 4
3:00 - 4:00 p.m.
MEETING & EVENTS TRACK - SESSION 1
Lessons Learned in the 11th-hour Pivot to Virtual Meetings

Since March, nearly every association has had to respond to quarantine rules and quickly adapt a wide range of meetings from citywide conferences and program planning meetings to annual membership meetings. In this session, an expert panel will share first-hand experience on how they transformed marketing and sponsorship opportunities, discovered the value of an agile moderator, and converted international meetings to a 24-hour experience. This session isn't about platforms and technologies, but rather re-imagining successful and long-running meetings in order to deliver an amazing customer experience to attendees wherever they are in the world.

Learning Objectives:

- Debunk assumptions that every aspect of a live conference can and should be carried over to a virtual environment
- dentify sponsorship opportunities in a virtual environment that limits branding opportunities but creates more opportunities for data collection and longer engagement tail.
- Communicate the benefits of a virtual meeting to stakeholders who value the in- person networking benefits of live conference and drive increased registration numbers.
- Discover new staffing needs, roles and responsibilities that ensure smooth technical execution and a high level of customer service.
- Engage constituents from across the globe by delivering content when they want to consume it.
- Deliver on the fun, engagement and connections that drive attendees to live events in a virtual environment.

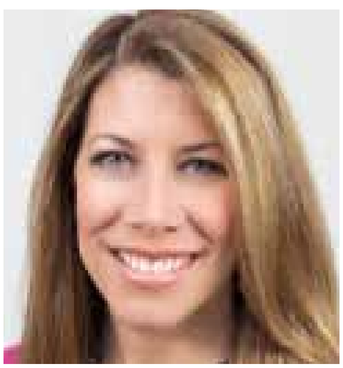
Beth Mauro

Moderator:

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.

Elizabeth Hogan, CMP

Gabrielle Copperwheat



Shannon Fagan

Panelists:

Elizabeth Hogan, CMP joined Association Headquarters in 2017 as a meeting manager for the Institute of Nuclear Materials Management and PATRAM, bringing a diverse meeting and hospitality management experience to the company. She recently joined the meeting management team for the American Society of Histocompatibility and Immunogenetics. Prior to joining AH, she served as a conference manager for AJ Jannetti and meeting manager for SMG at the Pennsylvania Convention Center. A graduate of Stockton University, Elizabeth also holds the Certified Meeting Professional certification.

Gabrielle Copperwheat has been an association executive with Association Headquarters for nearly three years serving as the Chief Operating Officer for the Controlled Release Society and Executive Director of the Insurance Society of Philadelphia. Prior to joining AH Gabrielle held a variety of marketing and client services management roles at Creative Marketing Alliance.

Shannon Fagan, CMP HMCC is the Director of Meetings and Exhibits for American Transplant Congress, a citywide meeting attracting transplant professionals from around. A 16+ year veteran of Association Headquarters, Fagan has contributed to a myriad of medical and scientific conferences and has deep expertise in program planning and exhibit management. Shannon is actively involved in industry associations and has served on the Board of the Philadelphia Chapter of PCMA and CAB for the Philadelphia Convention and Visitors Bureau. She holds the Certified Meeting Professional Certification as well as the Healthcare Meeting Compliance Certificate.

4:00 p.m. – 5:00 p.m.

Happy Hour

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BROWN DOG MARKETING

Immediately following the webinar program, please join us for a virtual happy hour to connect with fellow association executives in a casual format.

MASAE Annual Conference - 2020

Thursday, November 5
3:00 - 4:15 p.m.
EXECUTIVE TRACK - SESSION 1
Financial Modeling: How to design and deliver financial models to make critical (sound) decisions for your Association

sponsored by

The COVID-19 pandemic has forced associations to make drastic changes in how they operate and deliver services to their members. Whether facing significant decline in membership dues revenue or having to pivot from an in-person convention to a virtual event, the pandemic is forcing association leadership to make strategic financial decisions. In many cases these decisions will impact the ability of the organization to survive the current economic impact of the pandemic.

While these challenges may be difficult to navigate, successful financial modeling can be the key to ensuring association leaders have the data needed to make sound decisions. This presentation will provide association executives with an understanding of why financial modeling is important, what information and data will be needed to perform financial modeling successfully and how to communicate the results of financial modeling with their board leadership to facilitate effective decision making.

Learning Objectives:

- Describe the importance of financial modeling and how associations and nonprofit organizations can use it to assist in the decision-making process.
- Identify variables and scenarios for evaluation that provide important financial information
- Define key discussion points when working with an accountant and/or financial advisor to develop financial models
- Explain financial scenarios to volunteer leadership

Michael Pulik, CPA, CFE, CGMA

Michael Pulik, CPA, CFE, CGMA received his Bachelor of Science in Business Management with a concentration in Accounting from Monmouth University. He has held executive finance roles in both Corporate Finance and Public Accounting. He is a Certified Public Accountant, Certified Fraud Examiner and Chartered Global Management Accountant.

Michael specializes in business consulting and has extensive experience in Accounting, Financial Reporting, Internal Controls, Budgeting and Forecasting, Forensic Accounting and Process Improvement. He is a member of the New Jersey Society of Certified Public Accountants, The American Institute of Certified Public Accountants, and The Association of Certified Fraud Examiners.

Mr. Pulik serves as Association Headquarters' Chief Financial Officer as a key member of the Executive Management team. The CFO assumes a strategic role in the overall management of the company and has primary day-to-day responsibility for planning, implementing, managing and controlling all financial-related activities of the company.

Marc C. Labadie, MPAS®, CFP®, AIF®

Marc C. Labadie, MPAS®, CFP®, AIF®
Executive Vice President

In addition to overseeing RTD's business lines and strategic initiatives, Marc works directly with the firm's entity clients. He specializes in working with the boards and finance committees of national and international non-profit organizations, the retirement plan committees of small-to-middle market companies, and with attorneys or family members serving as trustees. In this capacity, he brings his formal training and experience in serving as a fiduciary to advise and educate clients placed in this important, and often unfamiliar role.

The son of a chemical engineer, Marc spent more than a few family dinners and homework sessions during his childhood, asking for the "executive summary" to a technically accurate but long-winded explanation to solve a problem. His upbringing not only fueled his work ethic and attention to detail but also his creativity. Not only can Marc analyze the issue at hand to propose a solution, the "what", but he can also effectively communicate the "why" of this solution to all stakeholders.

Marc has spent almost half of his life at RTD and is an equity shareholder and member of the firm's Board of Directors. He is actively involved in the leadership of the organization, serving as the chair of the firm's Strategic Project, Governance, and Trust & Non-Profit Committee. Sharing his expertise within the industry and community, Marc is a volunteer board member of the PLAN of PA, which specializes in integrated care management and special needs trust administration, while also serving on this non-profit organization's Trust Advisory Committee.

Kristy Cohen

Kristy Cohen
Account Executive, Association Headquarters

In her role as Account Executive at Association Headquarters, Kristy serves as the CEO of the Restoration Industry Association and Executive Director of NADCA, the HVAC Inspection, Cleaning and Restoration Association. Kristy has over 20 years of nonprofit experience driving organizational growth through strategic leadership. Her specialties include strategic planning, financial management, program development and volunteer management.

Kristy's motivation to deliver exceptional results for her association clients is driven by her passion for working with volunteer leaders, many of whom are entrepreneurs and small business owners. The opportunity to positively impact the growth and success of businesses and industries through a strong, innovative association is what Kristy enjoys the most about her work in association management.

Kristy holds a Bachelor of Science degree in Political Science from Appalachian State University. She is a member of the Mid-Atlantic Society of Association Executives (MASAE) and the American Society of Association Executives (ASAE) and recently served on the MASAE Mid-Year 2020 Committee.

Kristy is an avid sports mom who lives in Cherry Hill, NJ with her husband David and their three boys; Gabe (16), Ben (14) and Zach (12) and serves on the Cherry Hill American Little League Board of Directors.

Tuesday, November 10
3:00 - 4:15 p.m.
ESSENTIALS TRACK - SESSION 2
The Rise (and need) of Mentorship and How to Create a Successful Program

As associations continue to find ways to deliver value to members and prospective members, mentor programs, emerging leadership, and informal coaching programs continue to take center stage in filling that need. During this session, we will explore how one association created a custom mentor / mentee program to its membership while simultaneously backfilling its pipeline of volunteer leaders. We will see how this program led to a the much larger question of how the organization positioned its younger newer members for leadership, how its legacy members filled a much different role, and why these programs are fast-becoming sought after benefits for many associations.

Learning Objectives:
- How understanding your leadership path will assist both your organization and members on how to better engage in leadership opportunities.
- How to develop a simple framework for creating a mentor program and how to appropriately manage it - including, setting proper goals, accountability and growth.
- How a focus on emerging leadership can help transform the role the association plays in the lives of its members - both newer members and legacy members.
- How mentor programs and other opportunities create an intrinsic connection between organization and individual.

Brian Summers

Brian Summers oversees the day-to-day operations at CFMA and specifically heads up the development of CFMA's Conference Programming and CFMA's Leadership Development efforts. He has served in many leadership roles within CFMA, including co-chairing the Financial Survey, Education, Website Development and Conference Planning efforts. In 2019 he was presented a Chairman's Challenge Coin representing outstanding service and excellence. He was also named the third recipient of CFMA's 2014 Chairman's Award. Brian has presented and written numerous times for the ASAE/MASAE and has also served as MASAE President in 2010. Brian received a BS in Business Administration at Wilkes University and achieved ASAE's Certified Association Executive (CAE) designation 2008. Brian and his wife, Joanne, live in Lawrence, NJ with their children, Megan and Matthew as well as their dog Scully.

Brian Riggs

Brian Riggs is a native of Southern New Jersey where he currently resides with his wife and two daughters. He received his undergraduate degree from the University of North Carolina at Greensboro, his Master's degree from Rutgers University and in 2013, he graduated from Cornell University's change leadership program. Today Brian is the CEO of the Dialogue Shop, a division of Riggs Enterprise that focuses on leadership development, strategic planning and internal and external communications. More specifically, he works closely with individuals, leadership teams and organizations on developing internal and external goals, driving change through those goals and inspiring team members to embrace a purpose driven mindset. His clients reside within the for-profit and nonprofit space and range from the construction industry to banking to technology firms and hospital systems.

Wednesday, November 11
3:00 - 4:15 p.m.
MEETINGS & EVENTS TRACK - SESSION 2
Expo Central: Make Your Exhibit Hall THE Place to Be

Do the exhibitors keep sharing with you that they need more traffic? Has your organization's expo hall experience felt stale? Are attendees looking for greater insights and knowledge when interacting with exhibitors? Whether the expo is in-person, virtual or hybrid, it's key to keep your attendees in the hall and engaged with your industry partners, which leads to greater impact for the organization and the overall community. During this session, drawing from case studies, you'll hear the tips and tricks to surprise and delight your partners and attendees and ensure the expo serves as the central hub of connections and activities.

Learning Objectives:

- Understand how to drive participation in-person, virtually and/or both.
- Learn the keys to designing an expo experience that is inclusive and engaging for your stakeholders.
- Learn the key tactics to build the expo hall value that renews you exhibitors' participation and your attendees loyalty

Kathy Bradley

Kathy Bradley, CAE serves as Associate Vice President, Resource Development, Association Solutions for MCI USA. Kathy helps clients build strategies and conduct outreach programs that produce millions of dollars in new funding. Her specialties include converting one-off sales to year-round partnerships, resulting in increased revenue to her clients; market-based research to find new and innovative opportunities for engagement; message development around the basis for support; direct cultivation; and building the type of value delivery that creates longstanding relationships.

In May 2017, Kathy was named Managing Director of the Professional Development Consortium (PDC), an MCI USA full-service management client. As chief staff executive, she oversees and directs all of PDC's activities, including governance, operations, marketing, partnerships, and more.

Prior to her tenure at MCI USA, Kathy spent more than a decade honing her skills in both fundraising and events, including managing sponsorship, underwriting, and exhibit sales for trade shows with more than 350 participating supporting organizations.

Amy Lestition Burke, MA, CAE

Amy Lesition Burke, MA, CAE serves as Senior Vice President of Engagement, Association Solutions for MCI USA, a provider of full-service management and consulting services for associations, from strategic governance to non-dues revenue and virtual and in-person events. As Senior Vice President of Engagement, she builds membership recruitment and retention strategies for MCI USA's clients and leads the association solutions consulting work. Concurrently, Amy serves as Executive Director of the Special Libraries Association, a 111-year-old organization, representing individuals who research, manage, provide, and archive content, information, and data across corporate, government, association, and academic sectors. SLA members are the storytellers or "fact"tellers of information.

During her time with MCI USA, Amy has also served as COO for the Psychiatric Rehabilitation Association, implementing aggressive stakeholder-engagement strategies; as Executive Vice President of Photo Marketing Association International, managing enterprise-wide operations across four international offices; and managed a U.S. Centers for Disease Control and Prevention grant awarded to the Interstitial Cystitis Association. Amy was Executive Director of Association Media & Publishing, where she oversaw a complete name-change, rebranding, and membership restructuring. In addition, Amy served as Associate Professor at the Northern Virginia Community College where she instructed the course, Introduction to Non-Profit Management and she started her association career at the Greater Washington Society of Association Executives. Amy also serves as Executive Director for the Special Libraries Association (SLA).

Amy is originally from Buffalo, NY (Go Buffalo Bills!) and currently live outside of Washington, DC. She enjoys spending time with my family, Washington Nationals Baseball, photography, playing the piano, and baking with love.

Thursday, November 12
3:00 - 4:00 p.m.
EXECUTIVE TRACK - SESSION 2
Tips for Developing your Strategic Plan Virtually

Developing a strategic plan for your association is more important than ever. As in-person meetings continue to be canceled, Boards and association staff need to rethink their approach to developing or updating their strategic plan. This session will cover tips on how to achieve the same outcome of a traditional in-person strategic planning meeting in a virtual environment.

Learning Objectives:
- Review the basic components of a successful strategic plan
- Understand the importance of changing your mindset when it comes to strategic planning.
- Learn ways to breakup traditional meeting into different phases and formats.
- Hear tips how to set agenda and structure the meetings.
- Learn how to finalize your plan virtually.

Pete Pomilio

As an association architect for the last 15 years, **Pete Pomilio** has helped several nonprofit associations develop and advance their mission and visions, all while increasing their net assets. Prior to starting his consulting company, Association Renovation, Pete worked with two different Association Management Companies and served as Executive Director for several medical and trade associations. During his tenure, each association experienced tremendous growth, financial diversification, and expansion of member-orientated programs.

4:00 p.m. – 5:00 p.m.
Happy Hour

sponsored by

OnBoard
Board Management Software

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Tuesday, November 17
3:00 - 4:10 p.m.
ESSENTIALS TRACK - SESSION 3
Contracts in the Era of COVID-19

In-depth and fast-paced presentation on Negotiating and Contracting specific items and clauses for meetings for the next few years. Cancellation, attrition, Force Majeure and other clauses had been considered standard and unimportant and are now critical to a Meeting Planner's success. Extensive discussion on how hotels approach negotiations and contracts to give Meeting Planners an "Insider's Approach."

Learning Objectives:

- You'll see the inside secrets to design a dynamic RFP to have hotels aggressively compete for your business.
- Attendees will learn hotel revenue generation, rate quoting, meeting space assignments and insider's techniques to get the best deal possible.
- We'll examine newly critical clauses in contracts, including Force Majeure, cancellation and attrition, learning that especially in the COVID era, the planners can negotiate some exceptional terms and values.
- Attendees will receive RFP templates, booking forms and contract formats to get their RFP and Contracting skills underway immediately.

Tom Pasha

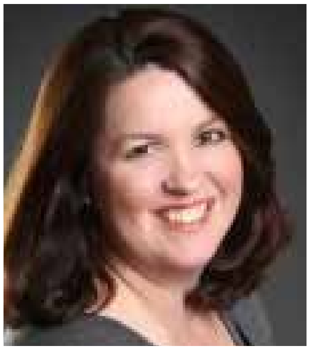
Tom Pasha has been recognized as one of the top convention planners in the industry. Starting in hotel positions of caddy, bellman, bartender and cook, Tom began his management career as a Hyatt Management Trainee in Chicago. He went to Sales Management positions throughout the Hyatt organization, working in 12 Hyatt Hotels over 20 years. Tom was Director of Sales at Hyatt Hotels in Greenville, San Antonio and Chicago O-Hare, and as Director of Sales, started the National Sales Office for Hyatt Hotels in Omaha. Tom won Sales Manager of the Year, Sales Director of the Year, Sales Team of the Year and the Donald M. Pritzker Award for Sales Excellence. Tom went into meeting planning and founded CONTACT Planning, Inc., a national meeting planning company with headquarters in Orlando. The company concentrates on corporate and association events, many with a golf element. CONTACT Planning Inc. books over 100,000 room nights and 30,000 rounds of golf at clubs and resorts nationwide, working with premier corporate and association clients.

MASAE Annual Conference - 2020

Wednesday, November 18
3:00 - 4:00 p.m.
MEETINGS AND EVENTS TRACK - SESSION 3
And the Award E-Goes to...

We've created virtual happy hours, exhibit halls and educational programs but what about your association's awards program? How do you take the fun, anticipation and excitement of an in-person awards celebration and transform it virtually? Hear from two association leaders with more than 20 years experience each around how they creatively and successfully took their awards programs virtually. You are sure to walk away with the award for best new ideas!

Learning Objectives:
- Get specific and inspired ideas from FOUR different virtual awards programs.
- Learn about different online tools and technical tools to fit every budget.
- Reimagine your awards program and its revenue opportunities.



Amy B. Lotz, CAE

Amy B. Lotz, CAE serves as Executive Vice President, Chief of Staff for MCI USA overseeing more than 150 talents in three US offices. She also serves a Interim Executive Director for the International Live Events Association (ILEA). Amy works to build strong relationships with association solutions talents across the organization to influence outcomes and maintain strategic goals.

Amy has more than 25 years of non-profit experience with national and global MCI clients including the Copper Development Association, the International Copper Association, Healthcare Convention & Exhibitors Association, and the Professional Development Consortium.

She recently produced a virtual awards program for the International Live Events Association which included both live and pre-recorded programming. For more than a decade with the Alliance for Women in Media and its sister Foundation, she was integrally involved with the growth and development of several pinnacle programs and activities, including the high-profile Gracie Awards, student initiatives and scholarships, and public-service campaigns.

For more than 13 years, Amy has directed MCI USA's longest-tenured consulting client, the Gies Foundation of the American Dental Education Association, for which she helped launch the Gies Awards to recognize exceptional contributions to oral health education including this past June as a virtual program.

Amy Lestition Burke, MA, CAE

Amy Lesition Burke, MA, CAE serves as Senior Vice President of Engagement, Association Solutions for MCI USA, a provider of full-service management and consulting services for associations, from strategic governance to non-dues revenue and virtual and in-person events. As Senior Vice President of Engagement, she builds membership recruitment and retention strategies for MCI USA's clients and leads the association solutions consulting work. Concurrently, Amy serves as Executive Director of the Special Libraries Association, a 111-year-old organization, representing individuals who research, manage, provide, and archive content, information, and data across corporate, government, association, and academic sectors. SLA members are the storytellers or "fact"tellers of information.

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4:00 p.m. – 5:00 p.m.

Happy Hour

Immediately following the webinar program, please join us for a virtual happy hour to connect with fellow association executives in a casual format.

sponsored by VISTA CONVENTION SERVICES

MEETINGS & EVENTS

Thursday, November 19
3:00 - 4:00 p.m.
EXECUTIVE TRACK - SESSION 3
Beyond Covid 19: Identifying and Addressing Today's and Tomorrow's Critical Issues

Making immediate and future decisions about the program portfolio has been a top agenda item for most associations today. Now that you have made the most critical decisions about your current programs, it's time to think strategically about the future.

You will learn a step-by-step approach to identify and prepare for the next critical issues that your association will face. This process will help you both identify known and potential issues and also help you develop action plans on how to address them even when, as with the current pandemic, the way forward isn't entirely clear.

Learning Objectives:

- Demonstrate skills to construct a strategic response strategy to a critical issue utilizing the 4C's framework:
- Translate feedback from key stakeholders to problem-framing questions.
- Categorize internal and external issues and determine priority based on impact and urgency.
- Demonstrate design thinking principles to determine innovative solutions and action planning.

Sharon Cox is a Senior Consultant at Tecker International.

Sharon Cox

Sharon Cox is a forward-thinking executive with over 25 years' experience in healthcare, providing strategic leadership and innovation at academic medical centers and teaching hospitals across the US. She is results-oriented with expert proficiency in contract and project management, regulatory compliance and readiness, and relationship and team building. Her clients have called her a transformational leader who embraces change and leads teams through innovative and rapid response to change. She has a proven history of aligning organization vision, mission, and values with long-term business strategies, action planning, and metric development. She has been successful in curating customized tools and solutions for her clients to enhance customer experience, mitigate risks, increase overall efficiencies, and improve organizational outcomes.

Committed to education, Sharon has been an adjunct professor for many years, preparing students for careers in allied health with a focus on nutrition, wellness, and sustainability. She has an innate ability to build and maintain effective and collaborative relationships and excels at facilitating team success.

Sharon is a registered and licensed dietitian in the state of North Carolina and currently serves on the Academy of Nutrition and Dietetics Board of Directors.

Jim Meffert

Jim Meffert is a Senior Consultant and Strategist with Tecker International who has broad experience in strategic planning, organizational design, program assessment, executive management coaching and advocacy strategy development.

Throughout his career, Jim has been a catalyst for growth, redesign, and dramatic change. He has worked with leaders in the public, private, and non-profit sectors and is most skilled at building the bridges between them. Jim has helped national organizations move beyond their traditional differences and paralysis by helping them to see their mutual and connected interests. He has helped rebuild troubled organizations and created national brand strategy and advocacy frameworks.

Jim has over 25 years of experience with national and regional organizations serving as CEO, leading Government Relations and Advocacy departments along with other staff positions. In addition to consulting and association management, Jim has served on numerous boards.

Cheryl Williams

Cheryl Williams is a Senior Consultant at Tecker International.

Cheryl leverages more than two decades of Fortune 50, corporate, global nonprofit and consulting experience to help clients thrive by providing best in class coaching, capacity building and communications expertise to mission-driven organizations. Cheryl has dedicated her career to helping organizations plan, develop and communicate to increase their impact. She thrives when she is working to develop breakthrough marketing communications strategies to help organizations refresh and grow their brands, increase their contributed income or enter new markets. When not helping organizations with market and communications, she's helping them plan strategically and leverage their resources effectively to reach their goals and achieve their missions.

Cheryl has extensive experience working with global organizations and understands the dynamics of planning global marketing strategies. She spent more than a year living in Singapore and was responsible for developing and implementing an external relations plan to rebuild a luxury skincare brand's reputation in four Asian countries and to establish it around the globe.

Even with a busy career, Cheryl has put aside her time and expertise to volunteer for a number of organizations including the United Lutheran Seminary, the Baltimore Design School and Baltimore Center Stage.

4:00 – 5:00 p.m.
Closing Keynote
Leading Change in the 21st Century

Marlon Argueta

Marlon Argueta is a success, management and leadership expert who has over 17 years of work and business experience in the areas of Management, Leadership and Personal Development. Marlon also has "hands on experience" managing billion-dollar projects in Fortune 500 Companies. He has been coached and trained by Tony Robbins and Brian Tracy.

Marlon's message helps connect engagement, passion, and purpose to help people take action and reach their true potential.

Marlon has a degree in Electrical Engineering, a MBA in Finance and a Project Management Professional (PMP) Certification. He is also a Brian Tracy Speaking Academy Certified Speaker.

On this presentation, Marlon will share proven leadership and change management principles that will help us drive change in these tough times. To illustrate these principles, he shares the story of a young man who came to our great country with nothing but a dream. As the story goes on, Marlon reveals each principle the young man learned while pursuing his dream.

These principles will help us drive change and inspire us to take action and discover new opportunities in these Covid-19 times.

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