

Mid-Atlantic Society of Association Executives

MASAE

2021 ANNUAL CONFERENCE

UPWARD

ONWARD

SIDEWAYS

Hard Rock Hotel and Casino
Atlantic City, NJ

December 8-10, 2021

Message from the President

It is with enthusiasm that we present our in-person 2021 Annual Conference, December 8-10 at the Hard Rock Hotel & Casino in Atlantic City, New Jersey! We are pleased to present two comprehensive days of learning, idea-sharing, and networking. I know I am looking forward to seeing everyone.

As I write this letter however, there is still a lot of uncertainty surrounding COVID-19. Safety is top of mind of the MASAE board and conference planning committee, and we are monitoring the situation closely. We are partnering with the Hard Rock Hotel & Casino to implement safety-protocols and will follow state and local guidelines set for in-person gatherings, as well as recommendations provided by the Centers for Disease Control and Prevention and the World Health Organization. More details will be provided as we get closer to the event.

The previous year has seen many hardships, challenges and difficulties, but we have held strong and continued the work of advancing our organizations. This year's conference theme, **Onward.Upward.Sideways**, focuses our attention on reflecting on what we've learned, sharing perspectives with peers, and building a blueprint for the future.

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 speak with at an MASAE event has roots in the nonprofit and association management community.

This year's educational lineup 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. The exhibit hall will complement the educational sessions – and allow you to see, hear and evaluate products, services and solutions, and to connect with our valued business partners.

On behalf of the MASAE Board of Directors, I want to express heartfelt appreciation for your interest in the 2021 Annual Conference. We look forward to welcoming veteran colleagues and greeting first-time conference-goers to foster connections and community building we've missed so much.



Gene S. Terry, CAE, IOM
2021 MASAE President



Atlantic City

VISTA

CONVENTION SERVICES



ATLANTIC CITY



BREAKOUT MEETINGS AT HARD ROCK HOTEL & CASINO ATLANTIC CITY



LET US HOST YOU...

With over 150,000 square feet of meeting and event space, Hard Rock Hotel & Casino Atlantic City is a performance powerhouse. From intimate board meetings, to large scale events and conferences, Hard Rock 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 2,250 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.

Experience a symphony of restaurants that include the modern Japanese flare of Kuro, Council Oak Steaks & Seafood, Il Mulino, or our newest restaurant Sandpiper Coastal Bar & Grill. Plus, the hits keep coming at the iconic Hard Rock Cafe serving up nothing but the classic favorites at our boardwalk location. This music-inspired resort highlights world class entertainment at Hard Rock Live or beachside, Sound Waves theater. Plus, Hard Rock Atlantic City features "365 Live," a program showcasing free live year-round entertainment spread across multiple stages.

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.

Hard Rock Atlantic City is pleased to welcome MASAE. To book your room online for special rates, visit: <https://book.passkey.com/go/MASAE2021>

SCHEDULE AT A GLANCE

Wednesday, December 8

6:30 p.m. – 8:00 p.m.	CEO Dinner Discussion for Senior Association Executives <i>How Will Tomorrow's Board Member Be Different?</i> (Requires additional registration fee)
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Thursday, December 9

9:30 a.m. – 10:00 a.m.	Attendee Welcome Reception
10:00 a.m.	Exhibit Hall Opens
10:30 a.m. – 10:45 a.m.	Welcome & Opening Remarks
10:45 a.m. – 12:00 p.m.	Thursday Opening Keynote: <i>Culture of Engagement: Why/How to Build A Passionate, Engaged Membership</i>
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
	EXECUTIVE: <i>Facilitation: The Essential Association Expertise</i>
	ASSOCIATION ESSENTIALS: <i>Using Your CVB as a Free Resource</i>
	MEETINGS AND EVENTS: <i>Predictions: Association Meetings, What's Next?</i>
2:45 p.m. – 3:45 p.m.	Breakout Session Two
	EXECUTIVE: <i>Top Legal Issues for Trade Associations</i>
	ASSOCIATION ESSENTIALS: <i>Behind the Scenes: Telling Your Association's Story with Video</i>
	MEETINGS AND EVENTS: <i>Maximizing Revenue For the Hybrid Event Future</i>
4:00 p.m. – 5:00 p.m.	Speed Networking with Exhibitors
5:00 p.m. – 6:00 p.m.	Free Time
6:00 p.m. – 8:00 p.m.	MASAE Annual Reception



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.

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SCHEDULE AT A GLANCE

Friday, December 10	
8:00 a.m. – 9:00 a.m.	Breakfast & Exhibits
9:00 a.m. – 10:15 a.m.	Friday Opening Keynote: <i>Learning with the Future: Continued Commitment to Foresight – (Anticipatory Learning)</i>
10:15 a.m. – 11:00 a.m.	Break with Exhibitors
11:00 a.m. – 12:00 p.m.	Breakout Session Three
	EXECUTIVE: <i>From the Ground Up – Implementing a DE&I Program Within Your Organization</i>
	ASSOCIATION ESSENTIALS: <i>Keeping Volunteers on a Positive and Productive Path</i>
	MEETINGS AND EVENTS: <i>Don't Overlook the Obvious: Safety & Site Selection</i>
12:00 p.m. – 1:00 p.m.	Lunch & Exhibits and Speed Networking Prize Giveaway
1:15 p.m. – 2:15 p.m.	Breakout Session Four
	EXECUTIVE: <i>We Recognize the Value and Importance of DE&I in Our Association! Now What?</i>
	ASSOCIATION ESSENTIALS: <i>Beyond the Webinar: Webinars as a Catalyst for Chapter Member Engagement Opportunities</i>
	MEETINGS AND EVENTS: <i>The Buck Doesn't Stop Here: Bridging the Gap between Planning and Approval</i>
2:15 p.m. – 3:15 p.m.	Closing Keynote: <i>Preparing for the New Post-COVID Reality: How to Stay Relevant and Position Yourself for Success</i>
3:15 p.m. – 3:30 p.m.	Closing Remarks & Door Prize Giveaway

CONFERENCE SESSION DESCRIPTIONS

Wednesday, December 8

6:30 p.m. – 8:00 p.m.

CEO Dinner Discussion for Senior Association Executives

How Will Tomorrow's Board Member Be Different?

Presenter: Brian Riggs

The catalysts of the 2020 / 2021 era have introduced a new era for associations and the cultures that sustain them. Sustained behavioral change as a result of COVID, Civil Unrest, the Great Resignation, along with a welcome focus on D,E and I, have created seismic shifts in individual and organizational values - and these shifts will have a lasting impact on our organizations.

During this discussion we will explore how a fundamental shift in values will transform the way our volunteer leaders interact with our association - shepherding in new cultural elements certain to redesign our governance structures.



BRIAN RIGGS

BRIAN RIGGS, CAE 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.

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.

CONFERENCE SESSION DESCRIPTIONS

Thursday, December 9

9:30 a.m. – 10:00 a.m.

Attendee Welcome Reception

This session is designed for new members, first-time attendees and people who just want to learn more about the benefits of MASAE and what to expect at the annual conference. This shortened session will be hosted by Lisa Kroll, MASAE Membership Committee Chair, Lisa Colangelo, MASAE Annual Meeting Planning Committee Member, and Taylor Griffith, MASAE Board Secretary. Whether you're a first-time attendee, returning attendee, or just want to meet new members, join us to pick up your welcome gift and ask any questions you have, during this exciting kick off!

10:00 a.m.

Exhibit Hall Opens

10:30 a.m. – 10:45 a.m.

Welcome & Opening Remarks

10:45 a.m. – 12:00 p.m.

Thursday Opening Keynote:

Culture of Engagement: Why/How to Build A Passionate, Engaged Membership

Speaker: Joshua M. Evans

Every member of your organization joined from an engaged, passionate place. During their first event they were excited and intrigued. However, with such demanding roles in their workplaces, it's understandable that their association membership would take a back seat. It can be easy for them to rationalize skipping networking events or educational sessions because of the demands of their daily life. How can we re-engage and impassion our members?

In this session you will learn practical tools to positively impact your members by reigniting their passion and re-engage their commitment. You will walk away with techniques to help them look beyond what your organization 'is' and what your organization 'does' to reveal what your professional organization truly MEANS to them and their professional success.



JOSHUA M. EVANS

JOSHUA M. EVANS is a #1 bestselling author in Leadership/Management Training, a TEDx Programmer, an organizational engagement specialist, professional corporate trainer, international speaker, and a leading expert on organizational culture!

Joshua has worked with hundreds of companies including AmericanExpress, ExxonMobil, GE, Latham & Watkins, HP, ReMax, Raytheon, Wood Mackenzie, Maersk International, Landry's, Fidelity National Title, DHL, Transamerica Life Insurance, and many others to assist them in creating the right company culture to improve employee engagement. His insights have been featured in The Wall Street Journal, Harvard Business Review, LA Weekly, Huffington Post, Inc., and many more.

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.

Joshua truly believes that for any organization to succeed they need to realize that attitude is far more important than aptitude. With 10+ years of corporate experience, Joshua marries his expertise, knowledge, and passion to help people enjoy and engage in work again, by traveling the country speaking and training audiences. It has become Joshua's mission to provide people with the tools to re-engage and love the work that they do to create healthier, more profitable businesses. He lives outside of Houston, Texas with his wife of 10 years and their three lovely children.

Joshua is on a mission to help people rediscover fulfillment, purpose, and meaning in their work.

MASAE Business Meeting & Presentation of Awards

Lunch & Exhibits

BREAKOUT SESSION ONE

EXECUTIVE:

Facilitation: The Essential Association Expertise

Speaker: Brian Riggs, Chief Executive Officer, The Dialogue Shop

Every association leader faces the challenge of facilitating, whether with boards, volunteer leaders, staff, or outside audiences. While facilitation skills are seldom taught, they play a major role in obtaining successful outcomes in almost every association. Explore the art and science of facilitation, learn how to overcome the most challenging facilitation situations, and take home critical tools that can be applied to everyday association opportunities.

Upon completion of this session, participants will:

- Embrace the power of facilitation
- Distinguish between presenting and facilitating
- Navigate difficult situations
- Apply a variety of tips and best practices in your association role
- Describe the future of facilitation

BRIAN RIGGS, CAE 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



BRIAN RIGGS

CONFERENCE SESSION DESCRIPTIONS

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.

ASSOCIATION ESSENTIALS:

Using Your CVB as a Free Resource

Speaker: Jessica Bittmann, Director of Sales, Greater Wilmington Convention & Visitors Bureau

Convention and Visitors Bureaus offer free resources that associations can take advantage of at home and also while planning events. This course is an impartial look into CVB resources, without focusing on one particular destination. It will be designed to be educational and not a sales pitch.

Upon completion of this session, participants will:

- Explore the ways that association executives can partner with local CVBs to enhance membership, to stay up to date on local events, to find venues and promote local events, and to source annual meetings.

JESSICA BITTMANN has been in the hospitality industry for over 20 years, focusing on the tourism sector since 2015.



JESSICA BITTMANN

MEETINGS AND EVENTS:

Predictions: Association Meetings, What's Next?

Speakers: Beth Mauro, Senior Director of Client Services, Association Headquarters

In 2019 all we could do was react to the reality of no live meetings and immerse ourselves in creating virtual events. As we emerge from pandemic lockdown, conversations are being had about reliance on meetings as a primary revenue driver, a vehicle for education delivery, and a big tent for networking. How has the Year with No Meetings made us think differently about the experience? Do we always need to be in person? Where are the opportunities? How do we take what worked in the virtual world and incorporate that into a live meeting?

Upon completion of this session, participants will:

- Identify opportunities to “burn it down,” sunset old practices and introducing new ones.
- Discover new sponsorship opportunities with a longer tail and better metrics to entice new sponsors
- Understand how upping your technology game at the meeting will have an impact across the association.
- Find new partners to help produce events

CONFERENCE SESSION DESCRIPTIONS

- Curate experiences within in-person events and topic-specific online events.
- Draw from across borders to expand your base



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 Baby Show, a hybrid event for suppliers and expectant parents presented by the Juvenile Product Manufacturers Association.

Prior to joining AH, Beth served as Director, Event Marketing for FW Media, where she managed the marketing and creative teams responsible for a diversified portfolio of 35 trade, professional and consumer events. Her company Mauro Barry Communications provided consulting services to AMCs, trade associations and professional organizations on a wide range of association functions. An editor and freelance writer, she has authored over 100 articles for trade and consumer publications. Her first foray into association management was as the Director, Communications and Education for the Home Sewing Association

Beth has served on the boards of New York Women in Communications, the Craft and Hobby Foundation and Bucks County Women's Initiative. A Pennsylvania native, she enjoys travelling, community service and cooking with her teenage son.

2:45 p.m. – 3:45 p.m.

BREAKOUT SESSION TWO

EXECUTIVE:

Top Legal Issues for Trade Associations

Speakers: Kayci Petenko & Noel Fleming, Founding Partners, Fleming Petenko Law

This presentation will examine key important legal issues trade association executives should be aware of to make sure their organizations are compliant with applicable laws. It will look at perplexing issues such as the proxy tax, conflicts of interest transactions, unrelated business income

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taxes, IRS Form 990 reporting, and corporate governance matters.

Upon completion of this session, participants will:

- Identify and address legal issues before they come problematic



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.



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 a 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. Kayci has been selected for inclusion as a Rising Star in Pennsylvania SuperLawyer® in the field of nonprofit law,

CONFERENCE SESSION DESCRIPTIONS

was a recipient of the American Bar Association Nonprofit Lawyer Awards: Outstanding Young Lawyer and was recognized as a Lawyer on the Fast Track by the Legal Intelligencer. In her free time, she enjoys traveling, baking, and volunteering at several nonprofits in her local community.

ASSOCIATION ESSENTIALS:

Behind the Scenes: Telling Your Association's Story with Video

Speakers: Melissa Venditti, Video Producer, Association Headquarters & Shannon Fagan, Director of Meetings and Exhibits, American Transplant Congress (ATC)

With video accounting for 80 percent of global internet traffic and 74 percent of marketers saying video has a better return on investment than static images, telling your story through video is more important than ever.

Including video in your marketing plan is one of the best ways to engage current and potential members, advertise member benefits and build excitement around new initiatives and live events. Video is also a great way enhance the attendee experience at both virtual and in-person events. This talk will help you identify what types of video can help your organization and how to get them made.

All associations have different needs but there are video options to cover them all. Examples of how to use video will be provided, including:

- Meeting promotion (both virtual and in-person)
- Promoting content within the meeting
- Increasing the quality of the attendee's experience through conference openers and daily welcome videos
- Telling the story of your organization and showcasing its value from various vantage points.

Related topics will include:

- How to decide what type of video will best tell your story
- The production process
- When/how to hire vendors
- How to make sure the final video is seen by the right people (distribution and social media strategy)

A 15-year veteran of the New York City and Philadelphia video production markets, **MELISSA VENDITTI** comes to Association Headquarters, Inc. in the role of video producer having built her expertise with high profile companies such as MTV, Barnes & Noble and Nickelodeon. With a background in producing, editing and videography, her career expands across a unique range of video formats including digital/social video content, on-air and digital promotions, live event coverage, educational content, digital signage and more. Melissa's love of short form, engaging



MELISSA VENDITTI

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SHANNON FAGAN

content is evident across her entire portfolio of work and in the fact that she always falls asleep before the end of a movie.

SHANNON C. FAGAN, CMP, HMCC is a Senior Meeting/Exhibit Manager at Association Headquarters, Inc. Shannon has worked at AH for over 16 years and has been responsible for the organization and execution of meetings ranging from 20 to 8,000 attendees. She has managed multiple annual and specialty educational conferences taking place in locations in New York City, Boston, Seattle, Chicago, Philadelphia, Los Angeles, San Francisco, Hong Kong, Beijing, Rio de Janeiro, Paris, Istanbul, Valencia, and Milan. Her expertise is in citywide convention meeting, exhibit, sponsorship, and program management.

Shannon Fagan is the Director of Meetings and Exhibits for AH client partner, the American Transplant Congress (ATC), the joint annual citywide Congress of the American Society of Transplant Surgeons (ASTS) and the American Society of Transplantation (AST). The Congress brings in over 5,000 attendees in the field from over 50 countries. She has also managed the World Transplant Congress (WTC), held in July 2014 at the Moscone West Convention Center in San Francisco, CA, USA. This was the second joint meeting of the American Society of Transplant Surgeons (ASTS), The Transplantation Society (TTS), and the American Society of Transplantation (AST). The Congress brought in over 8,000 experts in the field from over 90 countries.

MEETINGS AND EVENTS:

Maximizing Revenue for the Hybrid Event Future

Jennifer Kerhin, MBA, CEM, CMP, CEO, Sponsorship Boost

Hybrid meetings have only just begun. How to monetize this type of meeting without cannibalizing registration or expo revenue? Learn the different scenarios to help you maximize revenue while minimizing expenses.



JENNIFER KERHIN

JENNIFER KERHIN, CEO of Sponsorship Boost LLC, has more than 20 years' experience working with association tradeshow and business development functions. Jennifer has a certification of exhibition management (CEM), an MBA from the Johns Hopkins University and substantial executive level association experience.

She founded Sponsorship Boost to support the mission of associations by increasing their non-dues revenue through exhibits, sponsorships, advertising and corporate partnerships.

Understanding that active involvement within associations is the key to success, Jennifer is a committed member and volunteer in IAEE, ASAE and

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PCMA. She has been a speaker at ASAE's Annual Meeting, IAEE's ExpoExpo! And Cadmium's User conference, CadCon. She also founded the IAEE DC Chapter Women Leadership bookclub.

4:00 P.M. – 5:00 P.M.

SPEED NETWORKING WITH EXHIBITORS

5:00 p.m. – 6:00 p.m.

FREE TIME

6:00 p.m. – 8:00 p.m.

MASAE ANNUAL RECEPTION

Friday, December 10

8:00 a.m. – 9:00 a.m.

Breakfast & Exhibits

9:00 a.m. – 10:15 a.m.

Friday Opening Keynote:

Learning with the Future: Continued Commitment to Foresight – (Anticipatory Learning)

**Speaker: Sue Pine, FASAE, CAE, Strategic Advisors
BlochReed Association Advisors**

The aftermath of the pandemic has association leaders much more aware of the impact of external forces to their members and association. While futures-thinking and the practice of foresight may not have been incorporated into association discussions in the past, volunteer leaders are now more open to exploring current trends that may drive change in their organization.

Join this interactive session to easily understand more about this leadership competency and how you might be able to integrate the foresight discussion into your association.

In this session, you will receive a:

- Brief intro to the practice of foresight,
- Brief intro to the ASAE ForesightWorks Research
- Introduction to the 5 new Drivers of Change – just released in August 2021
- Opportunities to discuss with peers the “So what?” relative to their association’s future:

SUE PINE, FASAE, CAE, Strategic Advisor, is an association visionary and international speaker. Sue has worked closely with a variety of associations and professional societies managed by association management companies during her 40-year career.

Sue is a frequent speaker at ASAE, AMC Institute, and a variety of ASAE State Society meetings. Sue is an ASAE trained facilitator of the ASAE Certificate in Association Management. She is a subject matter expert on



SUE PINE

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Environmental Scanning, Trends Monitoring, & AMC Accreditation.

Sue is an active member of the American Society of Association Executives and the Mid-Atlantic Society of Association Executives. Sue has served on the Board and then as the Executive Director of AMC Institute, the trade association for association management companies. Sue is a past president of the Delaware Valley Society of Association Executives, and current member of the AMC Institute Accreditation & Standard Committee.

As a Past Chair of the ASAE Research Committee (2008), Sue was actively involved in the “Designing Your Future” trends project. Sue continues to serve on the ASAE ForesightWorks Advisory Team. Sue is a huge fan of the ASAE Research Committee and strong advocate for the need to incorporate trends-watching as a critical skill required by both key leaders of association staff teams and volunteer leaders. Sue furthered her training by attending the University of Houston Certificate in Strategic Foresight program.

Sue was inducted into the 2019 Class of ASAE Fellows. The ASAE Fellows program bestows an honorary recognition on less than 1 percent of ASAE’s membership. Sue has received the 2009 AMC Institute Lifetime Achievement Award, the 2008 Leadership Award from the ASAE-AMC Section Council, and the 2015 MASAE Distinguished Service Award.

10:15 a.m. – 11:00 a.m.

Break with Exhibitors

11:00 a.m. – 12:00 p.m.

Breakout Session Three

EXECUTIVE:

From the Ground Up – Implementing a DE&I Program Within Your Organization

Speakers: Joe Sapp, Chief Operating Officer, Talley Management Group & Derrick Johnson, Chief Diversity Officer, Talley Management Group

Hear from the senior leadership of Talley Management Group (TMG) as they detail how they went from the ground up in designing and implementing a diversity, equity and inclusion program. This session will lay out how TMG went through the process of truly understanding what DE&I meant to it’s team, clients, and other stakeholders as it answered the hard questions in addressing DE&I.

Upon completion of this session, participants will:

- Attendees will gain an understanding of the core functions of a DE&I program within an organization.
- Attendees will hear best practices and pitfalls when addressing DE&I within their organization.

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**JOSEPH SAPP**

JOSEPH (JOE) R. SAPP, MBA, CAE, Chief Operating Officer of Talley Management Group (TMG), has spent his career helping associations grow and thrive through association management and building successful partnerships with volunteer leaders. During his time with TMG, Joe has worked with a variety of professional societies in the healthcare/medical, technology, construction/engineering, and professional services industries.

In addition to serving as an Executive Director for several TMG client associations, Joe has held several other positions with TMG. Those include Associate Director of Association Management Services, IT Director, Director of Business Development and currently as TMG's Director of Strategic Development. Now, Joe serves as the Executive Director of the International Society for Extracellular Vesicles, a fast-growing scientific research society. Joe's leadership has resulted in a 35% growth in the organization's revenues in the last two years.

Joe earned the Certified Association Executive (CAE) credential in 2014 from the American Society of Association Executives (ASAE). The same year, Joe was named to the Association Forum of Chicagoland's prestigious Forty Under 40 List. Joe is a past president of the Mid-Atlantic Society of Association Executives (MASAE). A former student-athlete at Northern Illinois University, where Joe earned three Varsity Letters on the Huskie Wrestling Team. Joe recently completed his Masters in Business Administration. He lives in South Jersey with his wife Nicole and faithful Golden Retriever, Ernie.

**DERRICK JOHNSON**

DERRICK JOHNSON, CMP, DES is Chief Diversity Officer and Director of Event Strategy at Talley Management Group. He connects the diversity, equity, and inclusion initiatives of organizations with a sustainable vision of liberating experience for all. As a first-generation college graduate having completed undergraduate studies at the University of Florida, Derrick holds a Master of Science in Business Leadership and Management from Western Governors University. In addition, he has a Certificate in Artificial Intelligence: Implications for Business Strategy from MIT, a Diversity, Equity, and Inclusion in the Workforce Certificate from USF, the Digital Event Strategist (DES) credential from PCMA and is a Certified Meeting Professional (CMP).

Derrick joined the PCMA Board of Directors in 2019 and facilitated its Digital Event Strategist Certification Course in 2020, guiding thousands of business event professionals through an evolved digital mindset in the eye of COVID-19. He currently serves as Chair of the Board for LGBT Meeting Professionals Association and sits on the Board of Directors for the Lesbian and Gay Band Association.

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ASSOCIATION ESSENTIALS:

Keeping Volunteers on a Positive and Productive Path

Speaker: Sarah Gazi, Director of Association Management, Association Command

Managing volunteers can be one of the most challenging components to running a successful association. When volunteers do not have a clear understanding of their roles and responsibilities, or do but ignore it, progress of any association can come to a screeching halt. Navigating a meeting that is in the weeds or one that has become hostile can be tricky for staff, leaving them overwhelmed and dejected. As staff, it is our role to keep volunteers on the right path toward growth and success. Using the right tactics and powerful (but not combative) approaches can keep things on track and is essential to handling even the most difficult of volunteers.

Upon completion of this session, participants will:

- Describe the importance of keeping volunteers focused on the big picture
- List strategies to keep volunteers out of the weeds
- Demonstrate tactics to use when volunteers get heated and hostile
- Discuss how to have difficult conversations with volunteer leaders



SARAH GAZI

SARAH GAZI, CAE is an accomplished and dynamic association executive with 20 years of diverse experience managing scientific, trade, and medical associations of varying sizes, budgets, and geographies. As an executive director for the past 15 years, she has worked in both the AMC and stand-alone models.

A proven change agent, Sarah believes in every association's mission is to make something better by uniting causes, professions, and people. The chance to participate in positive change is what first drew Sarah to work in the association space.

Sarah currently serves as the Director of Association Management for Association Command, a division of The LMC Groups, in addition to her role in carrying out client services as eExecutive director. She brings both a creative and analytical mind to the associations she works with.

Sarah is a certified association executive (CAE) and a graduate of Rowan University, where she graduated with a B.S. in biology. She has also received the recognition of IOM from the U.S. Chamber of Commerce Foundation's Institute for Organization Management program.

CONFERENCE SESSION DESCRIPTIONS

MEETINGS & EVENTS:

Don't Overlook the Obvious: Safety & Site Selection

Speaker: Alan Kleinfeld, Director, Arrive Conference Solutions

Between a health pandemic, shooting violence and weather incidents, it's easy to get overwhelmed with managing risk and keeping your attendees safe. So, are you overlooking a key element? What about the venue? Is it a help or a hindrance? There are ways the venue and planner can work together to reach your safety goals that keep you, your staff, your stakeholders and your attendees safer. This session offers points and takeaways on how to conduct a site visit from a safety and security perspective. Venues are easy to overlook. Make sure you don't forget to include them.

Upon completion of this session, participants will:

- Discover unknown safety concerns
- Interpret how venues can influence safety
- Discuss the importance of site visit checklists



ALAN KLEINFELD

ALAN KLEINFELD is a seasoned and highly-sought after speaker, consultant and educator. With years in meeting management, his expertise runs the gamut from A to Z. However, it is his time as a public safety officer that gives him a unique viewpoint into conference safety and security. A few of his safety topics include site selection, emergency operations, work place safety and crisis communications. He also conducts site analysis for planners and suppliers wanting to have the safest venues for their meetings and events. Plus, he's a speaker who would enhance your organization's metrics towards diversity and inclusion. Lastly, he continues to serve as a law enforcement officer.

12:00 p.m. – 1:00 p.m.

Lunch / Exhibits and Speed Networking Prize Giveaway

CONFERENCE SESSION DESCRIPTIONS

1:15 p.m. – 2:15 p.m.

Breakout Session Four**EXECUTIVE:**

*We Recognize the Value and Importance of DE&I in Our Association!
Now What?*

Speakers: Bob Waller, President and CEO, Association Headquarters, Amy Williams, Vice President of Sales and Consulting, Association Headquarters, Natascha Williams, Meeting Manager, Association Headquarters

Is your board committed to ensuring diversity, equity and inclusion within your association but aren't sure where to start on your diversity, equity and inclusion journey? This session will challenge you to consider how you can assess, infuse and measure DE&I in every facet of your association, including:

- Human resources
- Mission, strategy and governance
- Board and volunteers
- Membership
- Credentialing programs
- Programs and events
- Marketing and communication
- Advocacy efforts
- Vendors and suppliers
- Industry/profession

Upon completion of this session, participants will:

- Describe research and best practices on association DE&I strategies, metrics and measures
- Recognize key takeaways and action steps for each area of consideration
- Examine the challenges and successes attendees are facing implementing DE&I efforts at their own organizations

BOB WALLER, CAE has worked at Association Headquarters (AH) for 32 years and during that time has served as the chief staff executive for 5+ organizations. Bob currently is the President & CEO and external face of AH, as well as the keeper of the company culture. In addition, Bob has served as the volunteer chief elected officer for five different organizations, as well as serving as a board member for three others.

Bob is recognized by colleagues as a leader in the association management industry, having received several industry awards such as the MASAE Points of Light Award, the NJSAE Excellence in Association Management Award, and the designation of Fellow by ASTM International. Recently, Bob won the Customer Service CEO of the Year award from the Customer Service Institute of America.

**BOB WALLER**

CONFERENCE SESSION DESCRIPTIONS

Bob is a past president of the AMC Institute, New Jersey Society of Association Executives (NJSAE – Now MASAE), and the International Consumer Products Safety Organization (ICPSO). He has served as a board member and officer for many area non-profits and children's charities, such as Kids In Distressed Situations (K.I.D.S.) and First-Candle.



AMY WILLIAMS

AMY WILLIAMS, CAE, MPA, IOM is Association Headquarter's (AH) Vice President of Sales and Consulting. Amy is a seasoned association management professional with over 25 years of association experience. She is a past president of the Mid-Atlantic Society of Association Executives and received the organization's Distinguished Service Award in 2018. Amy currently serves on the ASAE Research Foundation Research Committee. In 2021, Amy earned a Diversity, Equity and Inclusion in the Workplace Certificate from the University of South Florida, Muma College of Business.

Amy started at AH 17 years ago as an account executive and has led the new business and consulting efforts since 2017. In her current role, Amy and her team are responsible for securing new full service, hybrid and project business. Amy also leads AH's consulting efforts, which include strategic planning, operational assessments, association start-ups, nonprofit mergers, chapter and leadership development.



NATASCHA WILLIAMS

NATASCHA WILLIAMS has over 15 years of events management experience, Natascha uses her problem-solving skills, creativity, and flexibility to help clients produce corporate events and meetings. She excels at logistics and operations, and her attention to detail means that events and meetings go smoothly from concept to completion.

Natascha has been with Association Headquarters over a year as a Meeting Manager and manages the events of two clients, NOVA, Nurses Organization of Veteran Affairs and TERMIS, Tissue Engineering and Regenerative Medicine International Society. Prior to coming to AH, Natascha was the Director of Membership & Events at New Jersey Charter School Association for 5 years where she was responsible for membership growth in over 72 charter schools and the Annual Meeting of over 1500 attendees consisting of administrators and teachers.

CONFERENCE SESSION DESCRIPTIONS

ASSOCIATION ESSENTIALS:

Beyond the Webinar: Webinars as a Catalyst for Chapter Member Engagement Opportunities

Speaker: Erica M. Viviani, Communications Associate, Membership, American College of Physicians

Maximize member engagement by utilizing webinars as a catalyst for programming and networking. Explore how the creation of chapter engagement modules can provide easy to implement programming designed to provide members with opportunities to connect with their local colleagues and engage in discussions about topics of importance to unique member segment communities.

Upon completion of this session, attendees will:

- Identify strategies for utilizing webinars as a catalyst for member networking and engagement opportunities.
- Apply complementary programming to accompany webinars with a focus on bi-directional communications opportunities to help build relationships and create a sense of community among unique member segments.
- Create chapter engagement models designed to facilitate discussion, ignite idea sharing and foster member engagement



ERICA M. VIVIANI

ERICA M. VIVIANI has nearly a decade of experience in the non-profit communications industry with a focus on content strategy and communications program development. Currently, she serves as the membership communications associate for the American College of Physicians. Previous appointments include, communications manager of the American Red Cross New Jersey Region and the New York Junior League. Erica holds a Bachelor of Arts in Communications from American International College and a Master of Science from the Quinnipiac University School of Communications.

CONFERENCE SESSION DESCRIPTIONS

MEETINGS & EVENTS:

The Buck Doesn't Stop Here: Bridging the Gap between Planning and Approval

**Speaker: William (Tony) Scurry, II, MBA, CMP,
President/CEO, 7 Pointe Planning**

So many associations face the division of responsibility between sourcing and planning vs contract acceptance. When the person that signs the contract isn't the same person that is determining if the meeting and vendor or venue are a good match, how do you make sure nothing is lost in translation? It is not by osmosis that the association leadership's vision is transferred to the meeting planner. There are ground rules that every meeting planner – association leadership relationship should have. No matter if your meeting planner is in-house or third-party; if your event is in-person, hybrid, or digital; if this is the inaugural year or the 100th year the rules don't change. It takes understanding of scope, communication, and true collaboration to successfully move through the process. In this session, we will discuss those ground rules and talk through tips and tricks for a successful means of bridging the gap between planning and approval.

Upon completion of this session, participants will:

- Understand the importance of set-up and what should be done at the beginning of the process to support success at the end.
- How to execute effective communication between the meeting planner and association leadership.
- Learn why the relationship between the planner and leadership doesn't end when the meeting is over.



**WILLIAM (TONY)
SCURRY, II**

WILLIAM (TONY) SCURRY, II, MBA, CMP is a highly-motivated individual with over twenty (20) years of strategic event and meeting planning experience. He has managed an impressive list of events with multimillion-dollar budgets, ranging from less than 20 attendees to more than 10,000 attendees. Given his career focus on increasing the visibility of mission driven organizations; his experience, skills, personality, and aspirations, fit the position entrepreneur. He has spent years developing expertise in mission-critical logistics. Mr. Scurry is responsible for overseeing the creative and strategic direction of 7 Pointe Planning and providing a strategic framework for the conceptualization and execution of the clients' operations. He is currently developing a boutique brand, Anthony Event Designs, that will specialize in creating stories and multi-sensory event experiences.

A relentless pursuit of positive outcomes, creativity, and an eagerness to learn has characterized all his professional roles. Mr. Scurry's experience provides him with the skills and insights to create and deliver event solutions with high quality, meticulous execution, and the highest level

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CONFERENCE SESSION DESCRIPTIONS

of customer service in a fast-paced environment. A personable and influential communicator, he continuously strives for win-win solutions with all stakeholders, illustrative of his strong relationships with vendors and ability to secure preferred rates, dates, and spaces for clients. Mr. Scurry has served as a Project Director, Senior Logistics Director, and Senior Meeting Planner on numerous logistical contracts for several Private- and Public-sector contracts. He supervises meeting planners, logistic coordinators, and other staff to ensure that project activities are performed in accordance with task order requirements and contract schedules.

2:15 p.m. – 3:00 p.m.

Break with Exhibitors

3:00 p.m. – 4:00 p.m.

Closing Keynote:

Preparing for the New Post-COVID Reality: How to Stay Relevant and Position Yourself for Success

Speaker: Michael J. Lyons, President, Lyons Pride Enterprises, LLC

In this candid and interactive presentation, speaker Michael Lyons will present what we need to do as we emerge from the devastating impact that COVID-19 has had on our daily routines and the future of our careers. The pandemic has been a jolt that has forced us to make changes in our lives and jobs that we never anticipated. How we regroup, manage those changes, and position ourselves for the future, will shape our ability to succeed in a post-Coronavirus world. Now, more than ever, being hopeful and optimistic, working together, and shaking off fear and uncertainty will be the pillars we must rely on as we start 2022.

As previous crises have taught us, focusing on the fundamentals will help us recalibrate and get us back on the right track. During this talk, Lyons will emphasize the need to master multiple competencies and soft skills, while stressing the importance of polishing your personal brand. Regardless of your current skill set, level of experience, title, or responsibilities, the ongoing expansion of your career tool kit, particularly in this new environment, must continue daily as you seek positions of increased responsibility, or enter into a new role caused by the downturn in the economy, or other unexpected factors that may have shifted your career path.

Upon completion of this session, attendees will:

- Describe key attributes you need to focus on to enhance your professional reputation and personal brand.
- Determine how to adapt, stay relevant and keep ahead of the curve.
- Articulate your value to your (potential) employer, clients and peers.

CONFERENCE SESSION DESCRIPTIONS



MICHAEL J. LYONS

MICHAEL J. LYONS is an author, speaker, actor, podcast host and respected meetings industry veteran. Lyons has been delivering impactful talks over the past decade to both domestic and international audiences. As a thought leader and change agent, he focuses on the leadership traits necessary to succeed in today's competitive environment. His signature humor and easy-going style engage audiences to start thinking differently about their careers & lives, while inspiring them to chase their daydreams.

Before going out on his own in 2014, Michael spent more than 40 years in senior level management roles in the meetings/travel industry, including stints with CIGNA, Carlson Wagonlit Travel, Global Events Partners, Apple Vacations and EGR International. His last position in 2014 was Exhibition Director of IBTM America, a premier trade show organized by Reed Exhibitions - the world's largest trade show management company, based in London.

4:00 p.m. – 4:15 p.m.

Closing Remarks & Door Prize Giveaway

Costs:	Before November 12	After November 12
MASAE Members	\$250.00	\$300.00
Non-Members	\$300.00	\$350.00
CONFERENCE ADD-ON CEO Dinner Discussion (Dec. 8)	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. 8)
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: _____

Name on Credit Card: _____

Billing Address: _____

Signature: _____

Cancellations must be in writing and made no later than December 3, 2021.

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
Questions: 267-597-3818