



Presented by



2024 CSAE Annual Conference Program
The Hilton Fort Collins
425 West Prospect Road Fort Collins, CO 80526

Wednesday, June 5, 2024

12 PM – 4:45 PM

Registration open for Conference attendees in the Lobby

1 PM – 5 PM

Sponsors and Exhibits in the Atrium

12 PM – 4:45 PM

Social Activities in Fort Collins including:

- **Walking Tour of Downtown Fort Collins**
- **Old Town Food Tour**
- **Private Behind-The-Scenes Tour of New Belgium Brewery (and their sustainability initiatives)**

4:00 PM – 5:00 PM

Opening General Session

Location: Ballroom

Includes group activity to engage all attendees and “immerse us in experience and engagement” to begin the Conference

5:00 PM - 8:00 PM

Welcome Reception and Silent Auction with All Attendees and Special Guests

Location: Hilton Hotel Atrium

Silent Auction Featuring 40+ Items

Food Stations and Welcome



Thursday, June 6, 2024

6:30 AM -7:30 AM

Yoga – Aggie Room, Second Floor

Brisk Walk to the Bluebird Café for Coffee – Meet in the Lobby

Meditation – Research Room, Second Floor

7:30 AM – 8:15 AM

Breakfast Buffet in the Atrium w/Exhibits

8:00 AM - 4:00 PM

Registration and Exhibit Space Open

8:15 AM – 9:15 AM: **Opening Session and Thursday Keynote in the Ballroom**



Keynote Speaker: **Nora Burns**

The Cost of Culture: ECHOs of Leadership

What would you learn about leadership if you stepped out of the boardroom and into the trenches—mopping floors, stocking shelves, or making deliveries? For many of us, leadership titles like Manager, Director, or Executive bring responsibilities and expectations, but they can also create an ecosystem where leaders risk becoming disconnected from the realities of the front lines.

This keynote by Nora shares insights not only from her 30+ years of leadership experience but also from her groundbreaking research project, *The Undercover Project™*. As "The Undercover Candidate™" and "The Undercover Employee™," she went on over 250 job interviews and worked undercover for five major brands. These firsthand experiences revealed critical gaps in leadership and organizational culture—gaps that can result in disengagement, high turnover, and diminished organizational success.

Through real-world stories and actionable insights, Nora highlights the four key attributes of leadership that create ECHOs of influence, resonating from the executive suite to the front-line breakroom.

Learning Objectives:

By attending this program, participants will:

- **Understand Leadership Disconnect:** Recognize how cultural disconnects between leadership and front-line employees develop and their impact on organizational performance.
- **Identify Barriers to Engagement:** Analyze common cultural divides, including "Us vs. Them" dynamics, and their effects on employee engagement, retention, and productivity.
- **Learn From The Undercover Experience:** Explore real-life examples and lessons from *The Undercover Project™*, gaining insights into employee perceptions of leadership.
- **Incorporate Reflective Leadership:** Embrace reflective leadership practices to enhance self-awareness, empathy, and alignment between leadership and staff.
- **Apply the ECHOs Framework:** Implement Nora's four key attributes to foster a culture of inclusivity, engagement, and collaboration across all levels of the organization.

- Strengthen Organizational Culture: Develop actionable strategies to improve communication, collaboration, and trust between leadership and employees.

Key Takeaways:

- Insights into the disconnects between leadership and front-line employees, and their organizational impact.
- Practical application of the four ECHOs of leadership to improve organizational culture.
- Strategies for fostering collaboration, empathy, and inclusivity across all levels of the organization.
- Tools to mitigate high turnover and improve employee engagement through reflective and adaptive leadership practices.

This program is an essential opportunity for leaders to reconnect with their organizational culture, improve engagement, and create lasting leadership legacies that resonate throughout their organizations.

9:15 AM - 9:30 AM Break in Atrium w/Exhibits

9:30 AM - 10:15 AM

Breakout Sessions - Choose from Three Sessions

Session 1 in Salon 1: Managing Association Resources In An Uncertain Economic Environment From AMG National Trust: Emily Musser, Vice President of Client Relations; Shannon Stone, Senior Relationship Manager; Dan Cravitz, Vice President & Trust Officer; Jeff Forker, Manager of Retirement Plan Services.

In a time of economic uncertainty, effective stewardship of financial and human resources is critical to an association's success and sustainability. This session, led by experts from AMG National Trust, will provide association leaders with a comprehensive understanding of the current economic landscape and its potential implications for their organizations.

Through expert insights and practical guidance, participants will explore how to navigate challenges, capitalize on opportunities, and mitigate risks. Special attention will be given to resource management strategies and emerging trends relevant to associations in today's volatile environment.

Learning Objectives:

By participating in this session, attendees will:

1. **Understand Economic Impacts:** Gain insights into the current economic and market trends and their implications for associations.
2. **Identify Risks and Opportunities:** Explore potential risks and opportunities in managing financial and human resources during economic uncertainty.
3. **Optimize Resource Management:** Learn actionable strategies to steward resources effectively while positioning the association for future growth.
4. **Analyze Emerging Trends:** Understand how economic forces, labor market dynamics, and policy changes may influence resource planning.
5. **Develop Resilient Strategies:** Build a framework for long-term financial sustainability and adaptability in the face of uncertainty.

Key Takeaways:

- Insights into economic and market conditions and their relevance for associations.
- Practical approaches to resource stewardship during economic volatility.
- Identification of risks to avoid and opportunities to leverage for growth.

- Strategies for aligning financial and human resources with organizational goals and external challenges.
- A framework for building financial resilience and ensuring long-term sustainability.

This session provides association leaders with the tools and knowledge needed to navigate uncertain times, optimize resource management, and position their organizations for enduring success.

Session 2 in Salon 4: Championing a Personalized Online Experience

6 Things You Can Do Next Week to Improve the Member Experience on Your Website

Rob Bean, Partner, Senior Marketing Strategist, Refactored

A modern website isn't just a digital storefront—it's a platform for creating personalized experiences that position your association as the go-to resource for members and stakeholders. In this session, Rob Bean, Senior Marketing Strategist at Refactored, will share practical, actionable steps your association can take to elevate your website's personalization capabilities.

You'll also explore how emerging technologies, such as AI, can enhance the member experience without overburdening your internal teams. Whether your website is in need of a full overhaul or incremental improvements, this session will provide tools and insights you can start implementing immediately to make your site more engaging, efficient, and effective.

Learning Objectives:

By the end of this session, participants will:

- **Understand Personalization Best Practices:** Learn how to implement personalized website experiences that enhance member engagement and trust.
- **Improve Content Relevance:** Identify simple strategies for tailoring website content to meet diverse member needs and preferences.
- **Leverage AI for Efficiency:** Explore how AI-powered tools can streamline personalization efforts without overwhelming staff.
- **Optimize Resources:** Discover ways to enhance the member experience while making efficient use of existing resources.
- **Address Accessibility and Usability:** Ensure that personalization efforts align with best practices for accessibility and inclusivity, creating a positive experience for all users.
- **Develop a Website Action Plan:** Create a roadmap for implementing incremental improvements that deliver immediate value to members.

Key Takeaways:

- Six actionable steps to improve your website's member experience immediately.
- Insights into leveraging AI and other technologies to enhance personalization without adding undue strain on internal teams.
- Strategies for aligning website improvements with broader organizational goals for member engagement and satisfaction.
- A clear understanding of how to build and execute a roadmap for continuous website optimization.
- This session is ideal for association professionals seeking practical, technology-driven solutions to create a more engaging, personalized, and effective member experience online.

Session 3 in Salon 6: Stop Helping Me! Recapturing Time and Energy in Today's Wacky Workplace **Bob Wendover, President, Common Sense Enterprises**

Join Bob Wendover for a fun and sassy, but 100% practical look at how to face down the feelings of stress, fatigue and burnout so prevalent in today's workplace. Drawing on interviews and observations of 3,000 high achievers, Bob shares actionable tactics for reclaiming time and energy, avoiding daily distractions, and maintaining balance. This high-energy, interactive session promises a healthy dose of laughter, practical insights, and audience engagement, ensuring you leave with tools you can use immediately. No theory. Just tactics. With a generous dose of laughter and engagement. Guaranteed!

Learning Objectives:

By participating in this program, attendees will:

- **Understand Workplace Challenges:** Recognize the sources of stress, fatigue, and burnout in today's workplace and their impact on productivity.
- **Learn Focus Strategies:** Discover practical methods for maintaining focus and avoiding distractions during high-demand workdays.
- **Reclaim Time and Energy:** Apply actionable tactics to recapture time and boost energy for sustained performance.
- **Leverage Top Performer Insights:** Gain inspiration and ideas from strategies used by high achievers to remain effective and resilient.
- **Promote Wellness and Balance:** Explore ways to foster a workplace culture that values employee well-being and engagement.
- **Cultivate Practical Resilience:** Build personal resilience and adaptability to navigate the demands of a "wacky" work environment.

Key Takeaways:

- Practical, no-nonsense strategies to recapture time, energy, and focus in a demanding work environment.
- Insights from high-performing professionals on managing workplace distractions and stress.
- Techniques for fostering a more balanced and resilient organizational culture.
- An engaging, interactive learning experience with tools and ideas you can apply immediately.

This session is ideal for association professionals looking to enhance personal and team productivity, reduce stress, and create a more focused, energized workplace.

10:15 AM – 10:25 AM Break in Atrium w/Exhibits

10:30 – 11:15 AM

Breakout Sessions - Choose from Three Sessions

Session 1 in Salon 1: Forward-Focused Associations, Transforming Your Association for Tomorrow's Members: From Wipfli: Chad Stewart, Senior Manager, National Association Practice Lead; and Marcie Bomberg-Montoya, Partner, and leads the Strategic Advisory Services division. Joining them is Marilyn Akers Stansbury, CEO of the Independent Electrical Contractors Rocky Mountain (IECRM).

Is your association operating at its full potential? This interactive and dynamic session explores the concept of Prime—a state of optimization, performance, and health where all seven components of an association work in harmony to generate organizational momentum and velocity.

Chad Stewart and Marcie Bomberg-Montoya of Wipfli, alongside Marilyn Akers Stansbury, CEO of Independent Electrical Contractors Rocky Mountain (IECRM), will share insights and real-world examples

from IECRM's journey to achieving Prime. Together, they will discuss the process of systematically transforming an association by optimizing the following seven components:

- Compelling Vision
- Transformational Leadership
- Engaged People
- Thriving Brand
- Operational Excellence
- Financial Confidence
- Technology Optimization

This session will provide participants with actionable strategies to transform their organizations into forward-focused associations, ready to meet the needs of tomorrow's members.

Learning Objectives:

By the end of this session, participants will:

- **Understand the Components of Prime:** Learn about the seven interconnected components necessary for achieving organizational optimization and performance.
- **Explore Real-World Applications:** Gain insights from IECRM's journey toward transformation and identify lessons applicable to their associations.
- **Foster Transformational Leadership:** Discover how leadership behaviors and strategies drive systemic change and organizational health.
- **Enhance Member Experiences:** Understand how achieving Prime can improve member satisfaction, loyalty, and engagement.
- **Improve Operational Efficiency:** Learn how to align operational processes with strategic goals for increased efficiency and effectiveness.
- **Leverage Technology and Financial Resources:** Explore strategies to optimize technology and achieve financial confidence to support long-term sustainability.
- **Develop a Forward-Focused Vision:** Create a roadmap for leading their associations into a future-ready state by integrating the seven Prime components.
Is your association in a state of Prime?
- **Prime is a state of optimization, performance and health, where all seven components of the association are working together to generate organizational velocity and momentum.**

Key Takeaways:

- A comprehensive understanding of the seven Prime components for organizational success.
- Practical steps to transform your association into a future-ready organization.
- Real-world insights from IECRM's journey toward achieving Prime.
- Strategies to enhance member experiences, improve operational efficiency, and achieve financial and technological optimization.

This session is ideal for association leaders seeking to create systemic change, optimize resources, and position their organizations as forward-focused associations ready to meet the needs of tomorrow's members.

Session 2 in Salon 5: Roundtable Discussion: Chapters: Friend or Foe? Co-Facilitators: Teresa Fraker, Executive Director, Obesity Medicine Association and Brittany Tommelein (Husong), Programs and Events Manager, American Society of Farm Managers & Rural Appraisers.

Whether your association has well-established chapters or is exploring the potential for chapter development, this facilitated conversation will provide valuable insights and practical approaches to chapter management across various industries. Using real-world case studies, participants will explore the factors that contribute to successful chapter development and management.

This discussion will address key considerations such as the level of oversight, fiscal implications, legal considerations, and the importance of defining success metrics to ensure that chapters deliver an outstanding member experience. Participants will leave with a deeper understanding of how to approach chapter development strategically, balancing the needs of the association and its members.

Learning Objectives:

By the end of this session, participants will:

- **Understand Chapter Structures:** Explore the differences between informal and formal chapter models and the implications of each on oversight and governance.
- **Assess Financial Impacts:** Learn how to evaluate and plan for the fiscal ramifications of chapter development, including budgeting and financial oversight.
- **Navigate Legal Considerations:** Understand the legal implications of chapter development, including compliance, liability, and risk management.
- **Define Success Metrics:** Identify measures of success to ensure chapters deliver value and an outstanding member experience.
- **Leverage Case Studies:** Gain insights and best practices from real-world examples of successful chapter models across industries.
- **Strategize for Member Engagement:** Develop strategies to align chapters with the association's mission and enhance member engagement and satisfaction.

Key Takeaways:

- A clear understanding of formal and informal chapter models and their implications.
- Financial and legal frameworks to guide chapter development and management.
- Strategies for defining and measuring chapter success to ensure member value and satisfaction.
- Best practices and lessons learned from case studies across multiple industries.
- This session is designed for association professionals looking to build or optimize chapter structures that enhance member engagement, support the organization's mission, and deliver meaningful value to stakeholders.

Session 3 in Salon 4: Future-Proofing Associations: Insights from Technology Assessments Panel Discussion: From .orgSource: Sherry Budziak, Founder and CEO and Kevin Ordonez, President and Managing Director, Digital Strategy. Association panelists: Michael Hoehn, Chief Operating Officer, International Association for the Study of Lung Cancer and Luke Vidacovich, Director, Digital Strategy and IT, American Animal Hospital Association.

In today's rapidly evolving digital landscape, associations must stay ahead of technological trends to remain relevant, effective, and member-focused. This enlightening panel session brings together industry experts who will share outcomes from comprehensive technology assessments, offering actionable insights and strategic recommendations to future-proof your organization.

Participants will gain an understanding of emerging technologies, their potential impact, and practical steps associations can take to leverage these tools for enhanced member engagement, operational efficiency, and sustainable growth. This session provides a unique opportunity to equip your association with the knowledge and strategies needed to confidently navigate the future.

Learning Objectives:

By the end of this session, participants will:

- **Understand the Impact of Technology Trends:** Gain insights into key findings from technology assessments and their implications for associations.

- Identify Emerging Technologies: Explore new and evolving technologies and their potential to drive member engagement and operational improvements.
- Improve Operational Efficiency: Learn strategies to optimize internal processes and resources through innovative technology solutions.
- Enhance Member Engagement: Discover how associations can leverage technology to create personalized, impactful member experiences.
- Develop a Strategic Technology Roadmap: Understand the steps needed to integrate emerging technologies into a long-term growth strategy.
- Mitigate Risks: Learn how to address potential risks associated with adopting new technologies, ensuring ethical and secure implementation.

Key Takeaways:

Comprehensive insights into the latest technology trends and their relevance for associations.
 Practical steps to integrate emerging technologies for improved operations and member engagement.
 A framework for creating a strategic technology roadmap that aligns with organizational goals.
 Strategies to address ethical, legal, and risk considerations in adopting new technologies.
 This session is ideal for association professionals seeking to harness the power of technology to stay ahead in a competitive and ever-changing digital environment.

11:15 AM – 11:30 AM Break Before Luncheon

11:30 AM - 1:30 PM

CSAE Annual Business and Awards Luncheon in the Main Ballroom

Lunch will be served at tables. The Annual Luncheon features:

- The CSAE Business Meeting and Board and Officer Elections
- Reflections from Board President Kim Gill, President, Civica Associations, Conferences & Exhibitions
- Looking forward with Incoming Board President Paul Caputo, Executive Director, National Association for Interpretation
- CSAE Year in Review from Su Hawk, Executive Director
- Celebration of Colorado CAEs (Sponsored by Visit Pueblo)
- The 2024 Annual Awards. Categories and Nominees:

Outstanding New Initiative Of The Year

Nominees:

Culinary Medicine Workshop - Obesity Medicine Association

New Membership Benefits and Engagement - Colorado Mortgage Lenders Association

THE Map - Horse Trails of America

Emerging Leader Of The Year

Nominees:

Abbey Aguirre, Student, Faculty and Young Professionals Engagement, Colorado Society of CPAs

Allison Hammer, Member Engagement Manager, Medical Group Management Association (MGMA)

Heidi Melocco, Director of Operations, Horse Trails of America

Kori Sulewski, Membership and Operations Manager, Civica Associations, Conferences & Exhibitions

CSAE Volunteer Of The Year

Nominees:

Abbey Aguirre, Student, Faculty and Young Professionals Engagement, Colorado Society of CPAs and Member, CSAE Marketing Committee

Mary Beth Armbruster, Independent Consultant and Co-Chair, CSAE Marketing Committee

Richelle Kemper, Senior Sales Manager, Denver Marriott Westminster and Chair, CSAE Silent Auction and Social Activities Committees; Member, Annual Conference and Programs Committees

Betty Knecht, Executive Director, Colorado Mortgage Lenders Association and Member, Annual Conference and Programs Committees

Janet Randles, Independent Consultant and Co-Chair, CSAE Membership Committee

Kristin Richeimer, Executive Director, Council of Colleges of Acupuncture and Herbal Medicine and Co-Chair, CSAE Marketing Committee and Member, Annual Conference Committee

Outstanding Partner Of The Year

Nominees:

AMG National Trust (Earl Wright, Co-Founder and Chairman of the Board)

Hotel Colorado (Larry MacDonald, General Manager)

Association Of The Year

Nominees:

International Erosion Control Association (Samantha Roe, CEO)

Obesity Medicine Association (Teresa Fraker, Executive Director)

Society for Mining, Metallurgy & Exploration (Dave Kanagy, Executive Director and CEO)

And the final honor will be given to the recipient of the **2024 CSAE Lifetime Achievement Award**.

1:20 PM - 1:30 PM Break

1:30 PM - 2:15 PM

Breakout Sessions - Choose from Three Sessions

Session 1 in Salon 1: Measuring Success in Small Associations: Integrating Industry Benchmarks into Your Organization: From MGMA: Allison Gault, Director of Member Engagement and Allison Hammer, Manager, Member Engagement.

How does your association measure up to industry standards and benchmarks? This interactive session equips association leaders with the knowledge and tools necessary to evaluate performance, align organizational goals with industry benchmarks, and ensure continued growth and relevance in today's competitive landscape.

Participants will delve into what defines a "healthy" association by examining key performance metrics such as conference outcomes, net revenue percentages, membership retention, attendee engagement, and educational program participation. Real-world examples and hands-on exercises will empower participants to develop a custom scorecard to track their association's progress against industry standards, creating a framework for sustained success.

Learning Objectives:

By the end of this session, participants will:

- **Understand Success Metrics:** Define and explore key metrics of success in association management, including financial health, membership retention, and program outcomes.
- **Evaluate Organizational Health:** Analyze financial and membership indicators to identify traits of thriving, sustainable associations.
- **Benchmark Performance:** Stay informed about the latest industry standards and key performance indicators (KPIs) for measuring and benchmarking success against peers.
- **Develop a KPI Tracking System:** Learn to create a simple, effective scorecard to monitor organizational performance on a quarterly basis.

- **Customize Success Frameworks:** Utilize provided data points and best practices to craft an individualized scorecard tailored to the unique needs of their association.
- **Apply Industry Trends:** Translate insights from key trends and benchmarks into actionable strategies for organizational growth and sustainability.

Key Takeaways:

- A clear understanding of success metrics and their importance in association management.
- Practical tools for evaluating financial and membership health.
- Insights into the latest industry benchmarks and key performance indicators.
- Step-by-step guidance for developing a custom KPI scorecard tailored to organizational needs.
- Strategies for applying benchmarking data to drive organizational growth and relevance.

This session is ideal for association leaders looking to measure, refine, and enhance their organizational performance through industry benchmarking and strategic KPI tracking.

Session 2 in Salon 5: Roundtable Discussion: Membership: The Heart of ALL

Associations: Christian DeSousa, Director of Membership and Engagement and Teresa Fraker, Executive Director, Obesity Medicine Association; Kelsey Wood, Associate Director, Membership, IASLC

Members are the lifeblood of associations, driving the sustainability and growth of various business models. However, in a competitive professional landscape, members have multiple options for their fiscal commitments, making it critical for associations to clearly understand and deliver their value proposition.

This facilitated discussion will explore what attracts and retains members, innovative pricing strategies for products and services, ways to measure and enhance membership engagement, and how to foster a strong sense of community within associations. Participants will gain actionable insights and strategies to align their offerings with member needs and expectations across different demographics and sectors.

Learning Objectives:

By participating in this session, attendees will:

- **Identify Key Attraction Factors:** Understand the primary motivators that attract members and, more importantly, retain them over the long term.
- **Explore Innovative Pricing Models:** Learn about various pricing strategies for products and services that align with member expectations and encourage engagement.
- **Measure Engagement Effectively:** Discover best practices for assessing membership engagement and identifying trends across age groups or sectors.
- **Foster a Sense of Community:** Develop strategies to create and maintain a sense of community within associations to support professional networking and development.
- **Differentiate Member Experiences:** Explore ways to tailor membership value propositions to meet the diverse needs of association members.
- **Leverage Data for Decision-Making:** Use member feedback and engagement data to inform strategic decisions and enhance offerings.

Key Takeaways:

- Insight into the “it” factors that attract and retain members in associations.
- Innovative pricing strategies tailored to member expectations.
- Tools for effectively measuring and analyzing membership engagement across demographics.
- Strategies to curate a sense of community that supports professional networking and development.

- Data-driven approaches for aligning association offerings with member needs and expectations. This session is ideal for association professionals seeking to strengthen their value proposition, improve engagement, and foster long-term member loyalty.

Session 3 in Salon 4: Business Trends and Looking Forward with TABOR, property taxes, workforce and more with the Common Sense Institute: DJ Summers, Director of Policy and Research, Common Sense Institute.

Join DJ Summers, Director of Policy and Research at the Common Sense Institute (CSI), for an engaging session focused on key business trends and policy issues shaping Colorado's economy. As a non-partisan research organization, CSI delivers data-driven insights on the issues Coloradans care about most, including TABOR (Taxpayer's Bill of Rights), property taxes, workforce challenges, and regulatory developments.

This session will provide attendees with the latest findings from CSI's research and discuss how current and emerging trends impact the Centennial State's economic landscape. Participants will gain actionable insights to navigate these complex issues effectively and make informed decisions for their organizations and communities.

Learning Objectives:

By the end of this session, participants will:

- Understand TABOR and Tax Policy: Gain a comprehensive understanding of TABOR, its implications for economic policy, and its effect on Colorado businesses and residents.
- Analyze Workforce Trends: Explore current workforce challenges and opportunities, including labor shortages and regulatory developments affecting employment.
- Assess Property Tax Impacts: Learn about the latest trends in property taxes and their implications for organizations and communities.
- Navigate Regulatory and Development Trends: Understand the impact of regulatory changes and development trends on Colorado's economy and association operations.
- Leverage Research for Decision-Making: Use data and insights from CSI's research to inform organizational strategies and advocacy efforts.
- Prepare for the Future: Develop strategies to address emerging economic challenges and opportunities in Colorado.

Key Takeaways:

- Insights into TABOR, tax policy, and their economic implications for Colorado.
- An understanding of workforce challenges and regulatory developments shaping the Centennial State's business environment.
- Tools to analyze and adapt to changes in property taxes and development trends.
- Data-driven strategies for informed decision-making and advocacy efforts.

This session is designed for association professionals and business leaders seeking to stay informed and prepared for the evolving economic and regulatory landscape in Colorado.

2:15 PM – 2:25 PM Break in Atrium w/Exhibits

2:30 PM - 3:15 PM

Breakout Sessions - Choose from Three Sessions

Session 1 in Salon 6: Maximizing Member Engagement from Day 1: Savannah Spakes, Membership Coordinator, International Association for the Study of Lung Cancer.

Membership engagement begins long before renewal conversations—it starts from the very first day. In this session, attendees will explore innovative strategies and best practices for fostering meaningful member engagement within their associations.

Participants will learn how to understand the unique motivations of individual members, connect with diverse audiences through effective communication techniques, and deliver creative and impactful value. Through practical solutions and real-world examples, including insights from the International Association for the Study of Lung Cancer (IASLC), this session will empower attendees to develop actionable plans that enhance member satisfaction, belonging, and long-term retention.

Learning Objectives:

By participating in this session, attendees will:

- **Prioritize Early Engagement:** Understand the importance of engaging members early in their journey, before renewal periods.
- **Understand Member Motivations:** Learn techniques for meaningful conversations to uncover the motivations and goals that brought members to the association.
- **Enhance Communication Skills:** Discover effective strategies for connecting with diverse audiences and tailoring communication to individual needs.
- **Deliver Creative Value:** Explore innovative methods to deliver value and foster a strong sense of belonging within the association.
- **Address Real-World Challenges:** Engage in discussions about career challenges facing members and share practical, actionable solutions.
- **Implement Tailored Strategies:** Develop a customized plan to implement engagement strategies that address members' unique needs and expectations.
- **Leverage Success Stories:** Apply successful strategies used by the IASLC to cultivate a deeply engaged and thriving member community.

Key Takeaways:

- A clear understanding of the importance of early and consistent member engagement.
- Techniques for meaningful communication and personalized value delivery.
- Innovative strategies for fostering a sense of community and addressing real-world member challenges.
- Actionable insights and tools to implement successful engagement strategies tailored to unique member needs.
- Examples of proven strategies from IASLC to inspire and guide association efforts.

This session is ideal for association professionals seeking practical approaches to cultivate deeper member engagement, driving sustainable growth and community impact.

Session 2 in Salon 4: Hotelier/Association Panel Discussion

The relationship between associations and hoteliers is evolving rapidly in response to new trends and challenges in the meetings and events industry. This panel discussion, moderated by Leslie Milne, Global Account Executive & Project Manager at ConferenceDirect, brings together industry experts from both sides of the table. Panelists include Erik Barstow, Vice President of Sales at Visit Fort Collins; Melissa Gonyea, Senior Sales Manager at Hotel Polaris; Brittany Tommelein (Husong), Programs and Events Manager at the American Society of Farm Managers & Rural Appraisers; and Joanna Fetherolf, Managing Director at the International Erosion Control Association.

Through this engaging session, attendees will gain insights into how to foster productive working relationships between associations and hoteliers. Topics include what can and cannot be negotiated, effective strategies for collaboration, and actionable advice to navigate current trends in the hospitality and association sectors. Attendees will leave with enhanced understanding and practical tools to maximize value and ensure successful event partnerships.

Learning Objectives:

By the end of this session, attendees will:

- **Understand Negotiation Parameters:** Learn what aspects of hotel contracts and partnerships can be negotiated, and what aspects typically cannot, to manage expectations effectively.
- **Strengthen Collaboration:** Explore strategies for building productive, long-term relationships between associations and hoteliers.
- **Leverage Industry Trends:** Gain insights into emerging trends in the hospitality and association sectors and how they impact meeting planning and execution.
- **Maximize Value in Partnerships:** Identify approaches for achieving mutual benefits in hotelier-association relationships, ensuring a win-win outcome for both parties.
- **Enhance Communication:** Develop skills to communicate effectively with hotel partners to foster trust and streamline negotiations.
- **Apply Real-World Examples:** Learn practical lessons and best practices from seasoned professionals on both the association and hotel sides.

Key Takeaways:

- A comprehensive understanding of negotiable and non-negotiable aspects of hotel contracts.
- Effective collaboration strategies to build stronger relationships with hoteliers and destinations.
- Insights into emerging trends in the hospitality and meetings industries and how to leverage them.
- Practical examples and tools for optimizing hotelier-association partnerships.
- Enhanced communication techniques to create trust and streamline negotiations for successful events.

This session is designed for association professionals and hoteliers looking to deepen their understanding, improve collaboration, and maximize the value of their partnerships in today's dynamic environment.

Session 3 in Salon 1: The 21st Century Magic 8 Ball: Using AI Tools to Solve Association Challenges with Dan Streeter, Founder of Mission Fuel.

Gone are the days of relying on a Magic 8 Ball for answers to life's pressing questions. In today's fast-paced world, associations can turn to cutting-edge AI tools like ChatGPT to address some of their most complex challenges. In this highly engaging and interactive session, Dan will demonstrate practical, hands-on applications for a variety of AI tools, showing how they can revolutionize problem-solving for associations in Colorado and beyond.

This session will highlight actionable ways to leverage AI for improving member engagement, streamlining administrative tasks, crafting data-driven strategies, and overcoming common obstacles faced by associations. Whether you're a tech-savvy professional or an AI novice, you'll walk away with innovative tools and insights that can transform how your association operates in the 21st century.

Learning Objectives:

By participating in this session, attendees will:

- **Understand AI Applications:** Learn how AI tools like ChatGPT can address common challenges faced by associations, from member engagement to operational efficiency.
- **Enhance Problem-Solving:** Explore specific examples of AI-driven solutions to obstacles in communication, planning, and resource management.
- **Improve Member Engagement:** Discover how AI can be used to craft personalized messaging and streamline interactions with members.
- **Streamline Operations:** Identify practical uses for AI in automating routine administrative tasks, saving time and resources.
- **Gain Hands-On Experience:** Experiment with AI tools during the session, gaining confidence in their application to real-world scenarios.
- **Develop Future-Ready Strategies:** Understand how to integrate AI tools into long-term strategic planning for sustainable growth and innovation.

Key Takeaways:

- A clear understanding of how AI tools like ChatGPT can address operational and strategic challenges in associations.
- Practical, hands-on examples of AI applications to streamline tasks, enhance engagement, and improve efficiency.
- Innovative approaches to problem-solving and decision-making using AI-driven insights.
- Confidence in experimenting with and implementing AI tools for immediate and long-term impact.
- A roadmap for integrating AI into association strategies to remain competitive and future-ready.

This session is ideal for association leaders, decision-makers, and professionals seeking innovative, technology-driven solutions to overcome challenges and enhance organizational performance.

3:15 PM – 3:25 PM Break in Atrium w/Exhibits

3:30 PM – 4:15 PM

Breakout Sessions - Choose from Three Sessions

Session 1 in Salon 4: The Art of Judo in Business: Keys to Mastery of Persuasive Outcomes, Negotiating threats and Harnessing Flexibility and Precision to Achieve Balance in your Association: Shannon Stone, Senior Relationship Manager, AMG National Trust.

What can a 19th-century martial art teach association leaders about modern challenges? In this engaging session, Shannon Stone introduces a fresh perspective by drawing on the principles of Judo, an internationally renowned grappling-based martial art. The Judoka, or practitioner of Judo, is trained to move with strength, power, and precision. However, the core philosophy of Judo centers on utilizing an opponent's energy to one's advantage, turning potential threats into opportunities for success.

Shannon will explore how key Judo fundamentals, such as Mukuso (mental clarity), Resilience, Seiryokuy-zeno (maximum benefit with minimum effort), Active Inactivity, Kime (focus), Effortless Effort, and Mushin (clear mind), can be applied to critical aspects of association leadership. From improving communication to mastering negotiation and enhancing business management, participants will discover how to harness their actions for maximum impact with minimal effort, effectively redirecting challenges into positive outcomes.

Learning Objectives:

By the end of this session, participants will:

- **Apply Judo Principles to Leadership:** Understand and utilize Judo fundamentals, such as Seiryokuy-zeno and Kime, to approach leadership challenges with precision and clarity.

- **Improve Communication and Negotiation:** Learn techniques to use momentum and energy in conversations to drive more effective communication and negotiation outcomes.
- **Develop Resilience:** Explore how to build mental clarity and resilience (Mukuso and Mushin) to navigate high-pressure situations and challenges in association management.
- **Maximize Efficiency:** Embrace the principle of “maximum benefit with minimum effort” to conserve resources and achieve strategic goals more effectively.
- **Turn Threats into Opportunities:** Discover how to redirect external pressures and challenges into successful outcomes through strategic redirection and active problem-solving.
- **Enhance Business Management:** Leverage the Judoka mindset to approach operational and strategic priorities with calm focus and a results-oriented perspective.

Key Takeaways:

- Insights into the Judoka mindset and how its principles apply to association leadership challenges.
- Practical tools for improving communication, negotiation, and resilience in high-stakes environments.
- Strategies for achieving maximum results with minimal effort by aligning actions with strategic goals.
- Techniques for redirecting external threats and pressures into opportunities for organizational success.
- A new framework for addressing business management priorities with clarity, focus, and precision.

This session is ideal for association leaders and professionals seeking innovative strategies to enhance their leadership effectiveness and organizational impact.

Session 2 in Salon 6: Advancing the Talent – Purpose and Passion Panel Discussion: Bridging the Talent Gap: Opportunities for Associations and Universities in Colorado

Program Description:

Colorado State University (CSU), a leading academic institution in Colorado, is uniquely positioned to understand the career aspirations of graduating students. With the association industry ranking as one of the largest employers in the country and offering significant career opportunities across diverse sectors, there is immense potential for partnerships between associations and academic institutions like CSU.

Join Erik Barstow, Vice President of Sales at Visit Fort Collins; Christy Landwehr, Senior Director of Corporate Relations at the National Reining Horse Association; Amanda King, Communications Director for the City of Fort Collins and Adjunct Professor at CSU; and Marshall Floyd, Visitor & Conference Services Manager at Visit Fort Collins, for an engaging discussion. Explore how associations can leverage the talent pool from universities, understand what students seek in careers, and address what’s next for employers and academic institutions alike.

Learning Objectives:

By participating in this session, attendees will:

- **Understand Career Aspirations:** Gain insights into the career priorities and aspirations of graduating students and how associations can align with these needs.
- **Explore Partnership Opportunities:** Learn how associations and universities can collaborate to bridge the talent gap and create meaningful pathways into the workforce.
- **Leverage Talent Trends:** Understand trends in workforce development and recruitment that impact associations and universities.
- **Foster Workforce Diversity:** Identify strategies to engage and recruit diverse talent from academic institutions to enrich association leadership and membership.

- Enhance Employer Readiness: Explore what's next for employers in terms of workforce expectations and the evolving needs of young professionals.
- Develop Recruitment Strategies: Discover actionable approaches to attract and retain talent in the association industry.

Key Takeaways:

- Insight into the career desires of the next generation of professionals and how associations can align with these trends.
- Opportunities for strategic partnerships between associations and universities to cultivate talent pipelines.
- Practical strategies for addressing workforce challenges and enhancing recruitment efforts.
- A deeper understanding of workforce trends impacting both employers and academic institutions.
- Actionable steps for fostering diversity and engagement in association leadership and membership.

This session is designed for association leaders, HR professionals, and academic stakeholders seeking to build stronger partnerships and create impactful career pathways for the future workforce.

Session 3 in Salon 1: Navigating Ethical Complexities: A Collaborative Approach: Kristin Richeimer, Executive Director, CCAHM. Note: This session will be from 3:15 to 4:15 pm.

Ethics in the modern association landscape is more complex than ever, with challenges ranging from data privacy to the governance of artificial intelligence and fostering inclusivity. This dynamic and interactive session, led by association veteran Kristin Richeimer, CAE, provides an opportunity to explore these critical issues while earning 1 full Ethics CAE credit.

Through expert-led discussions and collaborative exercises, attendees will examine real-world ethical dilemmas and work together to develop actionable solutions. Participants will gain insights into emerging ethical challenges and practical strategies for fostering a culture of ethical awareness and sound decision-making within their organizations. This session is essential for leaders striving to ensure their associations operate with integrity and accountability in an increasingly complex digital and social environment.

Session Components:

- Overview of Modern Ethical Challenges in Associations:
- An exploration of the evolving ethical dilemmas affecting associations, including issues of data privacy, AI governance, and inclusivity in the workplace and membership.
- Interactive Group Exercise: Real-Time Ethical Problem-Solving:
- Small groups will tackle current ethical challenges, guided by structured prompts designed to encourage thoughtful discussion and collaborative solutions.
- Sharing Insights and Solutions:
- Groups will present their approaches and solutions, followed by an interactive Q&A session to broaden understanding and encourage practical application across diverse organizational contexts.

Learning Objectives:

- By participating in this session, attendees will:
- Understand Emerging Ethical Issues: Identify and analyze modern ethical challenges, including those related to data privacy, AI governance, and inclusivity, as they apply to associations.
- Enhance Ethical Decision-Making Skills: Apply collaborative problem-solving techniques to address real-time ethical dilemmas in a structured and effective manner.
- Foster Organizational Integrity: Develop strategies to embed a culture of ethical awareness and accountability within their organizations.
- Gain Practical Problem-Solving Tools: Learn frameworks for addressing ethical issues that are actionable and adaptable to their association's unique context.
- Promote Inclusivity and Transparency: Explore how ethical governance practices can foster inclusivity, build trust, and support long-term organizational success.

Key Takeaways:

- Comprehensive understanding of the ethical challenges associations face in the digital and social era.
- Practical tools for fostering ethical decision-making and problem-solving in real-world contexts.
- Collaborative frameworks to approach and resolve ethical dilemmas effectively.
- Strategies for embedding a culture of inclusivity, accountability, and transparency in organizational practices.
- Shared solutions and insights from diverse professionals, offering perspectives applicable across different association contexts.

This session is ideal for association leaders, decision-makers, and professionals who aim to strengthen ethical standards and foster organizational trust and accountability in a rapidly changing environment.

4:15 PM – 4:45 PM

Salon 5: Interested in Your CAE? Join us for an informal discussion about why a CAE can help you with your professional career and hear from CAEs and people who recently sat for the exam. Open to all attendees.

5:00 – 5:30 PM: Informal Meetups

Location: Lobby

Group 1: Conference Attendees – To Meet Others

Group 2: Young Professionals/Emerging Leaders – To Meet Other YPs/Emerging Leaders

Group 3: New Members/First-Time Attendees – To Meet CSAE Board Members

Evening: Dine-Around Restaurants, Enjoy Fort Collins on your own or join others from the Conference for dinner

8 – 10 PM: Hospitality Suite sponsored by Visit Fort Collins; Select Items Continue in Silent Auction



Friday, June 7, 2024

6:30 AM -7:30 AM

Yoga – Aggie Room, Second Floor

Brisk Walk to the Bluebird Café for Coffee – Meet in the Lobby

Meditation – Research Room, Second Floor

7:30 AM – 8:15 AM

Breakfast Buffet in the Atrium w/Exhibits

8:00 AM - 11:00 AM Exhibit Space Open

8:15 AM – 9:15 AM: **Opening Session and Friday Keynote** (1 CAE Credit)



Sherry Budziak, Founder and CEO, .orgSource

Leading with HEART in the World of Bits and Bytes

Location: Main Ballroom

In an era defined by technological disruption and rapid change, the principles of leadership are evolving. "Leading with HEART in the World of Bits and Bytes" explores how human-centered leadership, paired with technological innovation, can transform organizational challenges into groundbreaking opportunities.

Sherry Budziak, Founder and CEO of .orgSource and a leader in digital strategy, shares her personal journey through adversity and triumph, introducing the HEART framework—Humanize, Empower, Ascend, Reimagine, Transform. This framework offers actionable guidance for leaders navigating complex organizational environments, balancing empathy and innovation to drive visionary changes.

In this inspiring session, participants will learn to integrate resilience, innovation, and empathy into their leadership practices. Attendees will explore how to leverage technology to foster stronger human connections, create a culture of empowerment, and lead with purpose in the digital age. Whether you're adopting artificial intelligence, inspiring your team during uncertainty, or reimagining member engagement strategies, this session provides the tools and insights to thrive in the ever-changing digital landscape.

Learning Objectives:

By the end of this session, attendees will:

- Understand the HEART Framework: Learn the principles of Humanize, Empower, Ascend, Reimagine, and Transform, and how they apply to modern leadership.

- **Integrate Empathy and Innovation:** Discover strategies to balance human-centered leadership with the integration of emerging technologies.
- **Foster a Culture of Empowerment:** Develop techniques to empower teams and foster resilience in times of uncertainty and change.
- **Leverage Technology for Connection:** Explore ways to use digital tools to enhance human connections and strengthen organizational culture.
- **Reimagine Leadership in the Digital Age:** Identify opportunities to transform traditional leadership practices into visionary, future-ready strategies.
- **Enhance Member Engagement:** Apply the HEART framework to revolutionize approaches to member engagement and create lasting organizational impact.

Key Takeaways:

- A deep understanding of the HEART framework and its application to leadership in the digital age.
- Practical strategies for balancing empathy and innovation in organizational practices.
- Insights into fostering resilience and empowerment within teams.
- Techniques for leveraging technology to enhance connections and drive organizational success.
- A reimagined approach to leadership that aligns with evolving member expectations and digital opportunities.

This session is ideal for leaders and professionals looking to transform their leadership practices, embrace innovation, and foster meaningful connections in the face of technological evolution.

9:15 AM – 9:45 AM Break and Time with Exhibits; Final Bids For Special Silent Auction Items

9:45 AM – 11:00 AM: Case Study Roundtables from the Association Field in the Main Ballroom

Close out the 2024 CSAE Annual Conference with a one-of-a-kind immersive experience designed to bridge learning with real-world application. This dynamic session, **What Would You Do? How Would You Handle This Situation? The Case Study Collaboration**, invites attendees from diverse sectors of the association industry to collaborate on practical solutions to pressing challenges.

Facilitator-led tables will guide participants through case studies strategically crafted around ASAE's Certified Association Executive (CAE) domains. These scenarios reflect real-world issues faced by associations and will challenge attendees to apply insights gained throughout the conference to develop actionable solutions.

By the end of the session, attendees will have contributed to and received access to an exclusive knowledge database containing solutions and strategies derived from the case study discussions. This valuable resource will be available only to participants, making this collaborative workshop a must-attend to wrap up the conference.

Learning Objectives:

By participating in this session, attendees will:

- **Apply Conference Learnings:** Use knowledge gained during the conference to analyze and address real-world association challenges.
- **Collaborate with Peers:** Work with professionals across the association industry to develop innovative, team-based solutions to complex scenarios.
- **Understand Practical Applications of CAE Domains:** Gain a deeper understanding of ASAE's CAE domains and subdomains by applying them to real-world problems.
- **Enhance Problem-Solving Skills:** Develop critical thinking and collaborative decision-making skills in a dynamic, team-based environment.

- Contribute to a Knowledge Database: Participate in creating an exclusive, tangible resource that captures solutions to the challenges addressed during the session.
- Strengthen Networking Connections: Build lasting professional relationships with peers through meaningful, hands-on collaboration.

Key Takeaways:

- Real-world solutions to pressing challenges in the association industry, derived from collaborative discussions.
- A comprehensive understanding of how to apply ASAE’s CAE domains to solve complex problems.
- Exclusive access to a tangible, knowledge-packed database of solutions created during the session.
- Strengthened professional connections with peers from across the association industry.
- Practical tools and strategies to take back to your organization for immediate implementation.

This innovative session offers the perfect conclusion to the conference, blending collaboration, learning, and actionable takeaways in an engaging and impactful way. Don’t miss this opportunity to roll up your sleeves and contribute to a legacy of shared knowledge and solutions!

Domains Assigned for Case Studies

Case Study A: Governance (CAE Domain #A1)

Case Study B: Membership (CAE Domain #A6)

Case Study C: Executive Leadership (CAE Domain #C4)

Case Study D: Marketing (CAE Domain #D8)

Case Study E: Ethics (CAE Domain #D6)

Case Study F: Operations--Conferences and Events (CAE Domain #4E)

Case Study G: Operations--Technology (CAE Domain #4E)

Facilitators

Facilitator Name	Table Number Assigned	CAE Domain
Veronica Munoz (ACG)	1	A: Governance
Kelsey Wood (IASLC)	2	C: Executive Leadership
Su Hawk (CSAE)	3	A: Governance
Katy Rudzinski (OMA)	4	D: Marketing
Christian DeSousa (OMA)	5	B: Membership
Kim Gill (Civica)	6	C: Executive Leadership
Samantha Roe (IECA)	7	E: Ethics
Alexa Medara (OMA)	8	B: Membership
Christy Landwehr (NRHA)	9	D: Marketing
Kristin Richeimer (CCAHM)	10	E: Ethics
Brittany Tommelein (ASFMRA)	11	F: Operations--Conferences & Events
Mary Beth Armbruster (EIT)	12	G: Operations--Technology
Rob Bean/Dawn Cyr (Refactored)	13	G: Operations--Technology
Leslie Milne (Conference Direct)	14	F: Operations--Conferences & Events

11 AM – 11:15 AM: Recap with Key Learnings, Takeaways and More; Closing Comments and Acknowledgements in the Main Ballroom

11:15 AM – Noon: Check-Out (Late check-out benefit from Hilton Hotel) and Exhibitor Breakdown

Thank you for joining us at CSAE's 2024 Annual Conference!



Thank you to our 2024 Annual Conference Planning Committee:

Lori Adis, Assistant Director of Sales, Vail Resorts
Erik Barstow, Director of Sales, Visit Fort Collins
Joanna Feterolf, Managing Director, Conferences & Education, International Erosion Control Association
Marshall Floyd, Visitor and Conference Services Manager, Visit Fort Collins
Teresa Fraker, Executive Director, Obesity Medicine Association
Su Hawk, Executive Director, CSAE
Kelly Heemsbergen, Conference Manager, IASLC
Michael Hoehn, Annual Conference Board Co-Chair and COO, IASLC
Richelle Kemper, Sr. Sales Manager, Marriott Westminster
Betty Knecht, Executive Director, Colorado Mortgage Lenders Association
Leslie Milne, Annual Conference Board Co-Chair and Global Sales, Conference Direct
AnnMarie Priest, Executive in Transition
Kristin Richeimer, Executive Director, Council of Colleges of Acupuncture and Oriental Medicine
Dan Streeter, Co-Founder and CEO, Mission Fuel
Brittany Tommelein (Husong), Programs and Events Manager, ASFMRA
Sue Urbanczyk, Executive In Transition
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