

# OSAE 2020 Annual Conference Educational Program

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**Monday, August 31, 2020**



**11:00 a.m.-12:30 p.m. – Opening Keynote Session**

**Our Shifting Landscape: Associations as Key Industry Voices & Communities**

Lowell Aplebaum, FASAE, CAE, CPF

2020 has already been a year defined by the speed and magnitude of change. Every industry has seen impact, with the nonprofit sector as no exception. Based on priority topics, identified by attendees shortly before the session, so it is as timely as possible, and aligned with overarching areas that are guiding associations through these rocky times, we will explore what we have learned and what we can take back as we design paths of possibility for what's ahead.

His keynote address is reason alone to participate the OSAE 2020 Annual Conference. He's an industry thought leader that has his pulse on the current environment but with a focused eye on the future. You don't want to miss this year's annual conference opening keynote address!

**1:00-2:00 p.m. – Consecutive Educational Session**

**Sell Me This Pen**

Melynn Sight, President, nSight Marketing, Inc.

Growing passionate members that turn into advocates for your association is more challenging - and more important than ever. The choice to join your association is akin to the question "Why should I buy this pen?" The most successful associations are relentless in convincing members why they should choose "you." Yes, you, association executive are in sales. Associations with the most loyal members rely on a strong value proposition (sales pitch) to make decisions, lead and communicate how they are different. CEOs consider a member value proposition a critical step to convey the value of membership.

Learn what true value means, how to find and convey it and then how to best market it in your organization. A clear, simple message can establish you - hands down - as the best choice for your members. To persuade them to consider your organization, get laser focused on why they should consider yours above your competitors!

**2:15-3:15 p.m. – Consecutive Educational Session**

**Taming the Email Beast**

Randall Dean, MBA, The Email Sanity Expert®

Every day, busy professionals are getting buried under a continuing stream of both useful and useless email. Without a system for getting 'control of the beast,' professionals spend much of their work (and personal) time spinning wheels and feeling highly unsatisfied. If you would like to get control of your email 'beast,' you should attend this program led by Randy Dean, MBA, author of the Amazon bestseller, *Taming the E-mail Beast*. Randy shares strategies for effective email management, organization, and prioritization that have helped thousands of professionals regain control and sanity with their email activities (one university client even found that the average attendee saved more than 2 hours per week by taking this program). Enhance your productivity and efficiency with email today and walk away with immediately usable tips and techniques!



### 3:30-4:30 p.m. – Consecutive Educational Session

#### Me, Myself & My Camera: Implementing Video Production Solo

Nicole Volk, Director of Communications, Ohio AgriBusiness Association

In today's social media world, it is well known that video is king. In the association world, however, factors like small staff, limited resources and lack of time and expertise may seem to hinder the ability to produce video. Often, communicators will avoid utilizing video because they feel unqualified, undertrained or unequipped to create video content. But, with a camera, tripod and a few video tricks, implementing a video strategy is easier than you'd think. In this session, participants will learn how Nicole operates as a one-person video crew, see the equipment she uses and learn tricks to make the editing process less daunting.

Learning outcomes:

- Understand and recognize the video-ready equipment they already have and learn what other tools may be useful
- Discover best practices for shooting video and recording audio as a solo crew
- Learn tips and tricks for editing video to create a great final product
- Tips for being safe and social distancing in the creative process

## Tuesday, Sept. 1, 2020



### 11:00 a.m.-12:30 p.m. – Opening General Session

#### Associations at the Table with Legislators

Todd Baker, Chief Executive Officer, Ohio State Medical Association;

Tony Fiore, Executive Director, Ohio Salon Association;

Greg Saul, CAE, Director of Tax Policy, Ohio Society of CPAs

Demonstrating strength in the good times and the challenging ones like COVID-19. The pandemic has created challenges in many areas of association business, including advocacy. Government leaders, legislators and lobbyists simply cannot meet face-to-face to discuss the challenges organizations and their members are encountering. Given the myriad of new regulations and programs crafted to assist small businesses in particular, this is especially trying when so many organizations have been left out in the cold. Join leading Ohio lobbyists and government affairs directors for this insightful session aimed at helping you better understand how you can get your messages in front of lawmakers at a time when the only real option for communication is through your computer or device's webcam.



### 1:00-2:00 p.m. – Consecutive Educational Session

#### Business Development 2.0: How Relationship Nurturing Can Lead to More Effective Retention, Engagement and Growth Strategies

Lori S. Brown, Ohio Society of CPAs; Denise Ison-Miller, Ohio Society of CPAs

During this session, participants will learn from leaders within OSAE's membership on the topic of focused relationship building that leads to short- and long-term growth retention and engagement strategies. These subject matter experts will highlight how the use of a targeted framework can result in an effective development strategy that assists your organization in any situation, including the current pandemic and other unexpected environmental challenges. The never-ending changes within the business landscape cannot be ignored by association professionals in any segment of the industry. This session will help you prepare for tomorrow no matter what lies ahead.



### 2:15-3:15 p.m. – Consecutive Educational Session

#### Legal Challenges Today in the Midst of So Much Confusion

Marc Fishel, Esq.; Stephanie Schoolcraft, Esq., Fishel Downey Albrecht & Riepenhoff



OSAE's legal partners at Fishel Downey Albrecht & Reipenhoff continue to craft an insightful program on the importance of the social movements in our current climate and how we, as associations, must respond to and prepare for the changes that lie ahead. As Marc noted, "the only change we can predict is more change." Join Marc and Stephanie for a look at how associations can craft their future strategies to be less reactive and more proactive to social change and unexpected disruption.



### 3:30-4:30 p.m. – Consecutive Educational Session

#### Best & Worst Practices for Virtual Meetings

Mary Beth Cowardin, Vice President, AmericanHort

Lauren Manson, RHIA, Executive Director, Ohio Health Information Management Assn.

Tim Rorris, Chief Operating Officer, TCS Software, Inc.

This year has created challenges most of us would have never imagined. When in the history of U.S. business operations have conferences, face-to-face meetings and networking opportunities simply been impossible to hold? The answer: 1920. So, none of us had experience flipping traditional in-person events – large or small – into virtual ones that needed to provide the same value and offer on-demand learning like we have this year. In fact, prior to March, research says that only 30 percent of U.S. associations embraced any type of online or virtual learning. Learn from the panel of OSAE members on how they took their events to virtual platforms and found success. You'll also learn what may not have gone right and you'll gather perspectives from a tech company on what they learned to assist their association clients on the "ins and outs" of virtual meetings.

## Wednesday, Sept. 2, 2020



### 8:00-9:00 a.m. – Consecutive Educational Session

#### Diversity & Inclusion

Ohio Society of CPAs Staff: Tiffany Crosby, Director of Learning;

Margaret Finley, Diversity & Inclusion Strategist & Consultant;

Scott Wiley, FASAE, CAE, President & CEO

During this thought-provoking and culture-driven session, find out how the Ohio Society of CPAs have utilized their important role with their members and as a forward-focused organization to implement standards and applicable approaches designed at strengthening diversity, expanding inclusion efforts and putting an end to racism within their industry. Their goal? To move these initiatives forward in all nonprofit and for-profit fields.

## Wednesday, Sept. 2, 2020 (continued...)



### 9:10-10:10 a.m. – Consecutive Educational Session

#### You Don't Know What You Don't Know

Peggy N. Slaughter, CFP®, CRPS®, AIF®, CPFA, Retirement Plans Consultant, Saling Simms Associates, Inc.

You think COVID-19 is enough to ruin your summer? (yes, it is, but anyway...) Ever had the DOL show up to audit your 401(k) Plan? They are paid to find errors, and oh, what an easy job that is. Most plan sponsors don't realize the liability they take on with a 401(k) or other similar plan. Whether it's depositing employee contributions late (ERISA violation) or non-engaged investment advisor fees being deducted from the Plan (fiduciary breach), there are many potential errors that can result in penalties and costly corrections. Allow us to enlighten you to the traps you may unknowingly fall into and how to avoid them. This informative session will also include an introduction to the OSAE Members' 401(k) Retirement Plan Exchange. Reduce the amount of time spent maintaining a retirement plan, and the liability, through outsourcing. Employee notices, enrollment management, termination distributions, loans, year-end data gathering – all lifted from your already-too-busy workload. It also reduces your risk exposure by shifting liability to service providers who take legal responsibility for nearly all tasks involved with having a retirement plan. And you keep your own Plan design features. Too expensive? Actually, most Plans cost less in the Exchange. Come to learn about the pitfalls of offering a retirement plan and leave with a solution to help you sleep at night.

### 10:20-11:20 a.m. – Consecutive Educational Session

#### Working from Home: The New Normal?

Mack Calhoun, Marketing & Communications Manager, Ohio Physical Therapy Assn.  
Heather Cowles, CAE, Director of Membership & Engagement, The American Society for Nondestructive Testing;  
Victor Hipsley, President & CEO, Governmental Policy Group, Inc.

The shift to working from home: no commute, wearing comfy clothes every day and prepping for the next Zoom meeting. There are perks in working from home. But what are some of the issues with transitioning to a home office? We will consider remote work in associations from all angles. What is the relationship between a remote workforce and organizational concerns like camaraderie, productivity and talent management?

Learn about benefits and drawbacks of remote work from both the employer and employee perspectives. We'll also explore relationships between remote work and organizational culture, employee productivity, talent recruitment and retention. Our panel is excited to share their perspectives and gain from you what you've learned as we all went virtual due to the challenges presented by the COVID-19 pandemic.

### 11:30 a.m.-1:00 p.m. – The 2020 Closing Keynote Session

#### All the Mistakes I've Made to Make Me a Better Leader

Tom Balzer, CAE, President & CEO, Ohio Trucking Association

Former First Lady Eleanor Roosevelt said, "Learn from the mistakes of others. You can't live long enough to make them all yourself." In this session, you will get an introspective of an association executive's mistakes made over a 23-year career that can help you avoid the pitfalls that can trip up careers and compromise organizations. These are real-world examples of decisions association executives are faced with every day as leaders, mentors and humans.

While being very transparent about the mistakes, Tom will also provide the ways he wished he would have reacted, decisions he wished he had made and examples of how societal changes have modified reactions to situations. By the end of this session, you will have a list of notes of the "things not to do" when it comes to running an organization and caring for your career and your life.

