

Awards Luncheon & Silent Auction

December 1, 2023
Hilton Richmond Hotel & Spa Short Pump

Join us for VSAE's most popular annual event as the association community comes together to recognize this year's recipients of VSAE's Awards of Excellence.

This year the Community Service Committee has selected **Comfort Zone Camp**, an organization transforming the lives of children who have experienced the death of a parent, sibling, primary caregiver, or significant person. Proceeds from the silent auction will benefit both VSAE's education fund and Comfort Zone Camp. What better

way to support this worthy cause than to bid on an outstanding auction item that can only be purchased at our holiday event?

In addition, in the spirit of the giving season, we will be collecting non-perishable food items to donate to FeedMore. Bring a couple of cans or boxes from your pantry with you the day of the event.

More info on page 5.

[Learn more at VSAE.ORG/ALSA](https://www.vsaer.org/alsa)

How to Create a Strategic Planning Dashboard

The strategic plan is the guiding document for your organization. The strategic plan lays the map for where your organization wants to go and explains how to get there. Spending the time to create a well thought out plan is important for leadership. However, what do you do after the plan is created? How do you make sure the plan is carried out and how do you track its progress? Whether you are tracking a 1, 5 or 10 year strategic plan, a dashboard is a great way to track progress and recognize issues before it is time to review the plan again. Following are five steps in creating your strategic planning dashboard.

1. Layout the critical success factors.

Your strategic plan has important, big picture goals that it aims to reach. I refer to these as



critical success factors. Some strategic plans create success factors and then in the plan explain how they will meet those success factors. For example, maybe your organization wants to increase membership by 3% over the course of one year. This big picture number

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DON'T MISS IT!

AWARDS LUNCHEON & SILENT AUCTION

Friday, December 1

Hilton Richmond Hotel & Spa at Short Pump

SCHEDULE

10:30 am

Registration Opens

10:30–11:45 am

Reception, 50/50 Raffle, and Silent Auction (baskets only)

11:30 am

Luncheon Room Opens

12:00–1:15 pm

Silent Auction Ends and Awards Luncheon & Live Auction Begins

[REGISTER AT VSAE.ORG/ALSA](https://www.vsaer.org/alsa)

UPCOMING EVENTS

THURSDAY, NOVEMBER 30

Senior Staff SIG Meeting
Virtual

FRIDAY, DECEMBER 1

Awards Luncheon & Silent Auction
Hilton Richmond Hotel & Spa at Short Pump

WEDNESDAY, DECEMBER 6

Seminar Series
National Society of Professional Engineers
Alexandria, VA

[VIEW UPCOMING EVENTS AT VSAE.ORG/CALENDAR](https://www.vsaer.org/calendar)

WHAT'S IN STORE FOR '24!



An opportunity for professional Meeting Planners to bond as they share best practices and experience together the newest ideas in event planning. Approximately 6.5 CAE credits.

Meeting Planner Summit
March 21–22
Delta by Marriott Virginia Beach Bayfront Suites



The entire membership comes together for high-caliber educational sessions, networking at receptions and a banquet, and fun activities in the local area. Approximately 7 CAE credits.

Annual Conference
May 5–7
Hilton Norfolk The Main



Roundtable and panel discussions to explore the issues unique to owning and working for an Association Management Company. Approximately 4.25 CAE credits.

AMC Summit
July 16
Omni Richmond Hotel



Top-level decision makers focus in on the current challenges and opportunities in leading their association into the future. Approximately 9 CAE credits.

CEO & Senior Staff Retreat
September 16–17
Massanutten Resort



Virginia's premiere conference for association executives and meeting planners, offering an Expo with 70+ exhibitors and multiple educational sessions. Approximately 6 CAE credits.

Fall Conference & Expo
October 9–10
Greater Richmond Convention Center and Hilton Richmond Downtown



VSAE's most popular event! Bid on over 80 donated items, then enjoy a luncheon at which the winners of the Awards of Excellence are recognized.

Awards Luncheon & Silent Auction
December 6
Hilton Richmond Hotel & Spa Short Pump

Mark your calendars and learn more at vsaе.org/calendar

Thank You, 2023 PARTNERS

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VisitNorfolk

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Omni Richmond Hotel
Renaissance Portsmouth-Norfolk
Waterfront Hotel
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The Virginian Hotel

Leadership reflections



Zach Eisenman, VSAE
Deputy Executive Director

As 2023 winds down and we find ourselves barreling full speed ahead towards Thanksgiving and the start of the holiday season, it seems as good a time as any to turn our attention to 2024. For many reasons, 2024 should prove to be an eventful year. On a national level, 2024 will bring a presidential election, and all the media circus that follows. It is also a year in which we will see the continued exit of members of the Baby Boomer generation from the workforce (either through retirement or a scale back from full-time), while at the same time we will welcome more members of Gen Z into the workforce. To put Gen Z into context, those entering the workforce next year were all born in a post-9/11 world, with the class of 2024 high school graduates being born as late as 2006. 2024 also puts us at Year 4 from the start of the COVID-19 pandemic, and we will continue to navigate the lingering impact of COVID-19 on society.

For VSAE, 2024 brings about the association's 75th anniversary—an incredible accomplishment and milestone which we will undoubtedly celebrate in style all year long. The highlight of our celebration, however, will likely be at our Annual Conference on May 5-7 in Norfolk....so mark your calendars now.

As with any new year, we can expect to see several trends, new technologies, threats, and opportunities which we must all collectively embrace and navigate. While I certainly do not have a crystal ball, here are 3 trends I am keeping an eye on for 2024.

Artificial Intelligence Tools/ Use of Generative AI

Would it even be a column on the future if I didn't mention AI? One of the hottest topics of the past year, AI and more specifically the consumer facing models such as ChatGPT, will continue to grow and gain adoption next year. While there are a number of considerations (ethical, legal, etc.), it would be unwise to ignore Generative AI platforms and Generative

AI in general next year. Even if you and/or your staff aren't using it...your members might be.

Sustainability and Social Responsibility

While certainly not a new trend, initiatives such as ESG (Environmental, Social, and Corporate Governance) and/or CSR (Corporate Social Responsibility) will continue to have a significant effect on our associations, our members, and even our events. This can be anything from measuring the carbon footprint of your annual conference to revamping your community service committee. So, what do ESG and CSR essentially boil down to? What is your association or organization doing to have a positive impact on the planet, society, and your local community? If you can't answer that question, the time to start is now.

Personalization and the Customer Service Revolution

As our data and technology gets more advanced, there is an increasing expectation from our members and/or customers of personalization. In many ways this is learned behavior...log into your Netflix account and you'll see hundreds of suggested titles based on your watch history. Check out Amazon and look at all of the targeted ads related to your interests or hobbies. From a customer service perspective, it is all about the experience. Make things easier, intuitive, and have someone ready to assist when there are issues. As the world gets more and more automated, a personal touch and a pleasant interaction goes a long way.

In addition to VSAE's 75th anniversary celebration next year, I am excited to announce that **Chrissy Cannaday** from our staff will be taking over as Deputy Executive Director for the association. Chrissy has over two decades of experience as the Executive Director of the Virginia Society of Eye Physicians & Surgeons (VSEPS) and will bring a fresh perspective and keen attention to detail to VSAE. Many of you have likely interacted with Chrissy, whether in her role at VSEPS, or the past year at a VSAE event. I plan to remain extremely engaged with VSAE going forward—you're not getting rid of me that easily. Rest assured Terry and Chrissy will do a great job leading the association along with the rest of our fantastic team here at E&A.

Happy Thanksgiving to all, and I look forward to seeing you at the Awards Luncheon & Silent Auction on Friday, December 1.

is great to track on a dashboard as a year-long goal. That way you can see how you are progressing toward your goal throughout the year.

2. Break down the big success factors into smaller, important measurable items.

Often strategic plans will lay out the specific ways they will attempt to achieve the overarching goals. Using the example of a large goal such as a 3% increase in membership, you'd look at what pieces of your plan are helping you achieve that. Maybe there are plans to do membership drives each quarter, maybe you want to add a new member benefit to attract more members, perhaps there is a new program scheduled to launch. All of these are measurable pieces of the larger picture. Furthermore, It isn't enough to get new members, you have to retain your regular members. What plans for retention are outlined in your plan? All of these are good data points to track in your dashboard that can give you more information about your big-picture data.

3. Pick a digital platform to track data.

In today's digital world there is no want for a tool to help you track/visualize data. A great one to start with is Microsoft Excel because most of us already have experience using it, many of us already have this tool installed, and

Example of Strategic Planning Dashboard Layout

Success Factor	Goal	July 2023 (Benchmark)	August 2023	September 2023
Increase Membership by 3%	3090	3000	3008	3015
Revise Code of Ethics (GOAL MET)	1	0	0.5	1

you can use the formulas to calculate the data. There are many other applications that run the gambit of cost and efficiency, you can find these by searching google for 'strategic planning dashboard applications.' Other applications that you might be familiar with already are SmartSheet, PowerBI and GoogleSheets. I find it easiest to start with the basics and then scale up when I feel like I need to. The easiest platform for me to navigate and manipulate is excel, you might have another preference.

4. Plug in data.

Once you've chosen a platform you can begin setting up your dashboard. I prefer a simple model where I can see the numbers. If I need to make it fancy for a presentation or report, I will export the data to a different application. When I set up my view, I like to add a column at the beginning that has our

starting numbers. I use this as our benchmark. Next to the benchmark, I add what I expect the goal to be. Using the example above, if we have 3000 members and we want to grow by 3%, my goal would be 3090. Likewise, if the goal is to increase member benefits, I would add up all the benefits we currently have (my benchmark) and plus one would be our goal. Some platforms, such as PowerBI, allow you to import large amounts of data and then create dashboards from it. Another way you can track dashboard items is to pull the specific data and import just that information (this is helpful when taking numbers from your balance sheet and importing it). When your platform is set, it is time to add data. Make measurable data points, for example if updating your standards or code of ethics is important, use 0 for no progress, 0.5 for halfway done and 1 for done or utilize percentages with the goal being 100%.

5. Track the data.

Finally, track the data. If you are serious about using the strategic planning dashboard as a tracking tool, it is necessary to build in the administrative time to input the data. Without the data, the dashboard is just a pretty spreadsheet. Most factors can be tracked monthly. Sometimes there isn't any activity within that one success factor, but that is ok. I like to celebrate small wins so when I have met a goal, I mark it on the sheet.

If you are interested in creating a dashboard for your organization and would like to discuss it with me, I would love to get together! Send me an email, I would love to make your data come alive.

About the Author

Whitney Meyerhoeffer, CAE, a VSAE member, is the Director of Communications, State Chapter Relations, for the **American Mental Health Counselors Association**.



Awards Luncheon & Silent Auction

Important Dates

Friday, November 17 – The last day to donate items for both the online and in-person silent auctions. Donating ends at 5:00 pm.

Monday, November 20 – Bidding begins on online auction site, auctria.events/VSAE23auction; excludes live and in-person (baskets) items.

Wednesday, November 30 – Online bidding ends at 5:00 p.m. Both donors and winning bidders will be sent email notifications to coordinate item pick-up.

Friday, December 1 – Awards Luncheon & Silent Auction at the **Hilton Richmond Hotel & Spa at Short Pump**. 10:30 am - Registration Opens; 10:30-11:45 am - Reception, 50/50 Raffle, and Silent Auction (baskets only); 11:30 am - Luncheon room opens; and 12:00 pm-1:15 pm - Silent Auction ends and Awards Luncheon & Live Auction begins.

Three Auctions

Similar to last year, there will be three (3) different auctions - online silent, in-person silent, and in-person live. What's the difference?

Online Silent – items will be visible on our auction website for viewing and bidding. Items include food & beverage items, hotel stays in and outside of Virginia, merchandise, tickets for activities, tours, and attractions, and so much more. Past bidders will receive an email notifying them when the online silent auction opens. Anyone can bid on these items.

In-Person Silent – for the shopper who likes to get up close to items, this is for you. There will be a handful of basket items for auction on Friday, December 1. Although these items will be visible on the auction website, only registered bidders in attendance may bid on them. Winning bidders will take their baskets home with them the same day.

In-Person Live – known as Grand Prize Live Auction items, these curated destination packages open for bidding just after the luncheon begins at 12:00 pm on Friday, December 1. Our live auctioneer will describe each package and begin the bidding. Winning bidders will be contacted by the donors via email after the event with details on how to collect their prize.

Get Ready to Bid!

This amazing getaway package will be auctioned off live at the Awards Luncheon on Friday, December 1, at the **Hilton Richmond Hotel & Spa at Short Pump**.

See more live auction items at auctria.events/VSAE23auction



Experience Includes

- 7 night stay at AAA Four Diamond Luxury Mexico Resort in Nuevo Vallarta, Riviera Maya, Acapulco or Puerto Peñasco for two.
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Package Details

Stay in sun-kissed Mexico; the choice of city is yours! Four Diamond Luxury Mexico Resort is your new home, with your Master Room featuring a king-size bed or two double beds, a bathroom with a Jacuzzi tub, a TV, Wi-Fi and a private terrace with resplendent views. The resort offers a wide variety of activities and several beautiful pools and water features to explore. Now the cities. Nuevo Vallarta is home to an Aqua Park, Kids Club, Lazy River, and two beautiful, well-appointed spas. There are two 18-hole signature golf courses and a 10-hole par 3. The Riviera Maya resort features gourmet cuisine from all around the world, including the only Cirque du Soleil dinner show in Mexico. Golfers can choose to enjoy the Nicklaus Par Three Experience. Acapulco luxury resort pampers guests with its spacious rooms, private pools and sprawling Lazy River. Arrive at the resort in Puerto Peñasco and enter a land of magic and fascination. Seated between the Sea of Cortez and the Sonoran Desert, Puerto Peñasco is a unique environment made for stargazing, adventure, and exploration.

LET'S RECAP

Generative AI's Inflection Point

At the November 2nd seminar, "Association Boards and Technological Harm", Jeff De Cagna noted that society is at an inflection point when it comes to generative AI and urged association boards and leaders to develop a comprehensive understanding of generative AI's limits and problems and be prepared to act quickly to protect the interests of stakeholders and successors.

He identified five challenges rising from generative AI that associations need to address:

1. **Social challenges** - ensuring that AI does not perpetuate bias or undermine privacy
2. **Technological challenges** - exercising care in deciding how much trust to place in technology providers and ensuring responsible/ethical AI
3. **Economic challenges** - understanding generative AI's impact on jobs and prioritizing and strengthening human contributions at work

4. **Environmental challenges** - AI's impact on resource usage (e.g., water) and the climate
5. **Political challenges** - advocating/shaping AI regulation and protecting against disinformation/misinformation

He also noted challenges relating to copyright protection, accuracy and reliability of content in association content, and ensuring the integrity of professional credentials and industry standards.

To address these challenges, he called on association leaders to:

Establish the highest ethical standards for implementing generative AI technologies

Focus on responsible integration of human and machine intelligence

Strive to ensure humans don't come in second in an AI-first world

For more from Jeff on this topic, listen to his interview on VSAE ConneXions.

CEO SIG

Attendees of the CEO SIG, who met on Wednesday, November 1, discussed issues on the horizon for 2024. Topics focused around advocacy, economy, and personnel. They shared own association issues and leaned on colleagues for advice. Those issues that focused the session included changing outreach and lobbying strategies as it relates to upcoming elections and the 2024 General Assembly session, shared ideas on means for improvement around employee recruitment, discussed the need to focus on employee/personnel well being to further our organizational missions, highlighted strategic planning efforts, and discussed the reality of economic and inflation on our current work and what that might mean into the new year.

VSAE BOARD NOMINATIONS NOW OPEN

Ready to step forward and make a difference in VSAE and Virginia's association community? The Nominating Committee is accepting applications for the 2024-2025 VSAE Board of Directors **November 9 - December 14**. The board, comprised of 15 directors, helps set the strategic direction for VSAE. The committee is looking for candidates with diverse backgrounds, skills, experiences, and expertise who are committed to giving back to the association community and helping shape the future direction of VSAE.

Board service is open to all VSAE Executive members in good standing who 1) have been an active member of VSAE for at least two years, 2) attend VSAE events regularly, and 3) have served on or chaired a VSAE committee or task force. Board members serve a 2-year term, beginning May 1, and are eligible for re-election to a second 2-year term.

IT'S TIME

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How to Make Changes Faster

Associations have more data to work with than ever, but that can paralyze decision-making. Many choices made quickly can be worth the risk.

During the pandemic, associations learned a lot about how quickly they can change what they do. From shifting to remote work to building hybrid events, they countered the cliché of the “slow-moving ship” that’s long been attached to the industry.

But associations are still anxious about how quickly they can respond to challenges, and whether their current value propositions are fit for purpose. A new report from McKinley Advisors found that association CEOs have long-term concerns about their ability to handle shifts in the U.S. workforce, economy, technology, and more. I’ll have more to share about the report’s findings in a future article; for now, know that a lot of CEOs are understandably concerned with how they’ll steer their organizations through the next decade.

There’s no one easy fix for every association, but at the heart of the discussion around it is thinking about your organization’s change mindset, and how resistant your association might be to change. In a recent Harvard Business Review article, authors Frances X. Frei and Anne Morriss point out that organizations tend to develop a lot of false narratives around their inability to change. Many of those narratives will likely resonate with the association world: “We can do it later” (a slight variation of that old association chestnut, “we’ve always done it that way”), “going fast is reckless,” “our people are stretched too thin.” All of those can be legitimate responses—especially the last one at small-staff associations. But the most pervasive and troublesome one, I think, is “we need more information.”

You do indeed need information—the importance of data-driven leadership has been hammered home to association leaders repeatedly in the past decade. And there’s so much more information that associations have access to now. But that’s both a benefit and a



“Some leaders who’ve stumbled were holding out for 100% of the information they wanted.”

problem—risk-averse staffs and boards can always spend more time parsing the data as a way to punt on making meaningful decisions.

But data is there for guidance, not perfect clarity. As Frei and Morriss write, “Some of the leaders we know who’ve stumbled in leading change were holding out for 100% of the information they wanted, including crystal ball confidence in the endings of stories not yet written—precisely how employees would react to a decision, for example, or how competitors would respond to a bold strategic move.”

You don’t know the end of your association’s story, except that you’ll never find out if you don’t start writing it. One good modest example of this is the case of the Snow and Ice Management Association, which earlier this year tried out a hybrid conference concept that failed to take off. There were reasons

why SIMA reasonably thought it was worth a shot—hybrid is the future, right? But not for its audience. However, the experience delivered some meaningful insights into what its audience does want.

Cautiousness and care are virtues, no question. But only to the extent that you’re not neglecting the kinds of headwinds your association may face in the next decade. Go too slow, Frei and Morriss write, and “you’re putting at risk your chance to make meaningful change.”

About the Author

Mark Athitakis, a contributing editor for *Associations Now*, has written on nonprofits, the arts, and leadership for a variety of publications. He is a coauthor of *The Dumbest Moments in Business History* and hopes you never qualify for the sequel.

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AROUND THE COMMONWEALTH



The Local Government Attorneys of Virginia, Inc. (LGA) awarded its highest honor, the Edward J. Finnegan Elizabeth D. Whiting Award for Distinguished Service, to **Phyllis A. Errico**, General Counsel, **Virginia Association of Counties**, at its recently concluded fall conference in Reston, Virginia. The Finnegan Whiting Award recognizes Phyllis for her significant and sustained contributions to Virginia local government law and LGA.

DUES INCREASE FOR 2024

Renewal notices for 2024 VSAE member dues will be going out in the coming weeks. The Board of Directors has approved a minimal increase for 2024 VSAE Executive memberships. Below are the new membership dues rates, effective January 2, 2024.

EXECUTIVE

1st and 2nd\$360

3rd and more.....\$190

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*Located 50+ miles outside of Richmond.

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3rd and more.....\$295

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