



— VIRGINIA SOCIETY of —
ASSOCIATION EXECUTIVES

YOUR *association* PRESS

AUGUST 2017

The Dark Side of Strength in Leadership



Have you ever hired a manager just to discover six months later whom you really hired and regretted your decision? Have you ever promoted someone for their technical abilities but fired them for their people skills or poor leadership? What makes a manager successful in one job but a disaster in another? Why do supervisors fail and what can you do about it?

Get answers to these questions and more at the **September Monthly Luncheon & Seminar** on **Friday, September 8**, at **Meadow Event Park**. Tom Davidson, CSP, PCC, SPHR, will present **"The Dark Side of Strength in Leadership,"** an information-packed and thought-provoking presentation that will help you identify and avoid the deadly blind spots we all have in one form or another so you can help your staff succeed; save your organization time, money, and embarrassment; and avoid your own potential train wrecks in the process.

During lunch, Tom will present, **"Making the Most of Mistakes,"** to help you release people's potential while maintaining accountability by drawing a critical distinction between mistakes and misdeeds.

If you are interested in a more personalized evaluation of your organization's leadership, you have until September 1 to take a confidential online assessment and receive an individualized report at the seminar. There is a \$50 fee for this service. Sign-up when you register for the luncheon and seminar at vsae.org.

Tom Davidson, CSP, PCC, SPHR, is the principal consultant and speaker with Leadership Nature. He works with forestry and natural resource managers to accelerate their future leaders, ignite their leadership teams, and regenerate their meetings and events...because great leaders do not grow on trees.

It Is Not Just For Meeting Planners

**EDUCATIONAL
SYMPOSIUM
& EXPO**

October 5, 2017

Greater Richmond Convention Center

4+

Hours
CAE Credit!

The VSAE Educational Symposium & Expo can benefit anyone in the association world. It combines top-notch education and networking opportunities with an amazing tradeshow for one of the best conferences held annually in Richmond.

The keynote and breakout sessions cover topics from **game-changing tech tools** to keep you organized and productive, to creating **cool content for social media**, **building a powerhouse board** that is engaged, **creating a culture of innovation**, **HR traps to avoid**, and **risks facing associations**.

This year's event also features recognition of the **Virginia Business Meeting Planner of the Year**. Come see VSAE

continued on page 4 >

REGISTER AT [VSAE.ORG/EXPO](http://vsae.org/expo)

DON'T MISS IT!

SEPTEMBER MONTHLY LUNCHEON & SEMINAR

Friday, September 8
Meadow Event Park

Speaker:

Tom Davidson, CSP, PCC, SPHR

8:00–8:30 a.m. Registration
8:30–11:00 a.m. Seminar
11:00–11:45 a.m. Networking Reception
11:45 a.m.–1:15 p.m. Luncheon

Register online at vsae.org.

UPCOMING EVENTS

MEETING PLANNER SUMMIT

August 16–17

Hilton Norfolk The Main

CEO & SENIOR STAFF RETREAT

September 18–19

Hilton Norfolk The Main

COMMUNITY SERVICE HABITAT FOR HUMANITY

September 29

Location TBD in Ashland

EDUCATIONAL SYMPOSIUM & EXPO

October 5

Greater Richmond Convention Center

NOVEMBER MONTHLY LUNCHEON & SEMINAR

November 3

DoubleTree by Hilton Richmond-Midlothian

Check out all events at vsae.org/upcoming-events.

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CEO AND SENIOR STAFF *retreat*

SEPTEMBER 18-19
HILTON NORFOLK THE MAIN



The CEO & Senior Staff Retreat is a two-day event with a limited number of association CEOs, Executive Directors, and other senior staff leaders. This event is geared specifically to association executives who run associations including those who work for association management companies.

At this year's retreat, there will be a presentation about focusing your board on its duty of foresight. There will be time for facilitated confidential roundtable conversations among colleagues. Additionally, there will be content focused on honing your leadership skills. From big picture industry trends to specific qualities of a good staff leader, this event is designed to cover all the important aspects of the unique role of an association CEO.

Registration for this event INCLUDES your sleeping room on Monday, September 18.

Register today and join your CEO colleagues for one of the best professional development values around.

Learn more at
vsae.org/ceoretreat

Leadership *reflections*



Brandon Robinson, CAE
VSAE Executive Director

With no major events in July or August, we used to say VSAE "took off the summer." There are now events in both months, so that is no longer the case. It is also a busy time preparing the annual Membership Directory (included with this issue), getting ready for the Educational Symposium & Expo, finalizing the budget, and reviewing nominations for the annual Awards of Excellence. (Speaking of which, have you submitted your nomination yet?) vsae.org/awards-of-excellence

This summer has also seen some very important governance work by your Board of Directors. In last month's column, I reflected on the very successful 2017 Board Advance where the board approved the recommendations of a Governance Task Force focused on better engaging members in the leadership of the association. See below for the newly approved Bylaws which formally codify these changes. Now, a Policy Review Task Force

will begin reviewing the Board Policy document with an eye towards continuing to strengthen the governance of the association. This governance work may not always have the "sexy appeal" of some initiatives, though it is important work to keep moving VSAE toward its vision of being the best at making you and your associations the best.

Like many of VSAE's members, the staff team is hard at work throughout June, July, and August. However, it is also a time when we each take time off to recharge. According to 2015 data from the Organization for Economic Cooperation and Development (OECD), the U.S. is the fifth most productive country in the world and the average worker puts in more hours than any other country in the top fifteen.*

Suffice it to say, we work hard and I would go even further to say that in the association space, we probably put in additional hours at events, at night, and on weekends that might not be reflected on official time sheets. Since we all work so hard, it is very important to take time off and recharge. In fact, VSAE events in the summer months are structured to provide some recharge and relax time.

How do you recharge and relax? Have you looked at some of VSAE's retreats and summits as a time to do so with fellow association professionals?

* <http://time.com/4621185/worker-productivity-countries/> (8/4/2017)

On July 6, 2017, the VSAE Board of Directors approved an amended version of the bylaws. The amended bylaws can be found on the VSAE website on the Governance Document page in the About section.

If you have any questions, please call the VSAE office at (804) 747-4971.

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> **Expo**, continued from page 1

and *Virginia Business* magazine recognize the unsung hero of the non-profit world—the meeting planner.

There are multiple registration options available. Come for the entire event, the morning sessions, the afternoon sessions, or just the Expo with lunch. Registration starts at \$50.

REGISTRATION

Attendees must be a qualified meeting planner or association professional to attend the Expo.

RATE	EARLY-BIRD By Aug 25	ADVANCED Aug 26 – Sep 22	REGULAR After Sep 22
Full	\$85	\$95	\$105
Morning only	\$70	\$80	\$90
Afternoon only	\$60	\$70	\$80
Expo only	\$50	\$60	\$70

FULL registration includes a networking reception on October 4, all education sessions, breakfast, the Expo with lunch, and parking on October 5.

MORNING registration includes breakfast, keynote, morning breakout session, and the Expo with lunch.

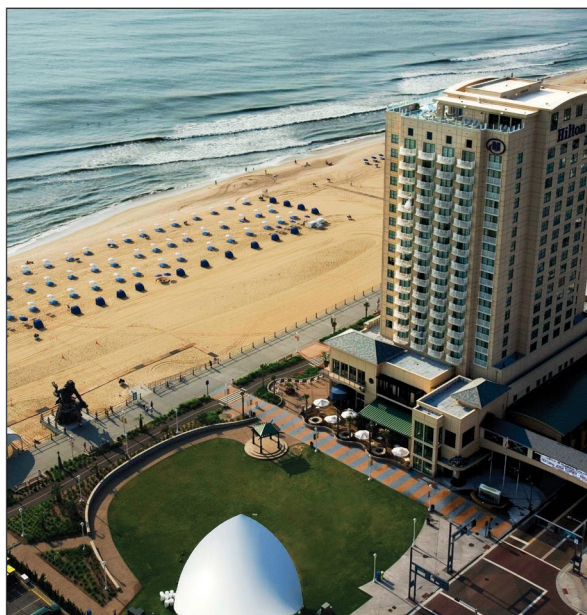
AFTERNOON registration includes the Expo with lunch and an afternoon breakout session.

EXPO ONLY registration includes the Expo with lunch.

RECOGNIZE YOUR PEERS

It is time to recognize your peers who go above and beyond in service to VSAE and your association community by nominating them for the **2017 Awards of Excellence**. Given annually, the Awards of Excellence recognize members who have exhibited integrity and professionalism in service to the association community. The nominations deadline is Friday, September 8, 2017. Winners will be recognized on December 1, 2017 at VSAE's Award Luncheon & Silent Auction.

Visit vsae.org/awards-of-excellence to learn more and complete an award nomination form.



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EVENT AGENDA

WEDNESDAY, OCTOBER 4

5:30–7:00 p.m.

Networking Reception

Hilton Richmond Downtown

THURSDAY, OCTOBER 5

8:00 a.m.

Registration Opens

8:30–9:50 a.m.

Breakfast &

Keynote:

KILLER APPS FOR LEADERSHIP

Beth Ziesenis, "Your Nerdy Best Friend"

Take a deep dive into the free and bargain apps that will help you move up the ladder. Learn the tools you need for personal organization as well as game-changing tech tools to help your organization function more efficiently and support team collaboration.

10:00–11:30 a.m.

Morning Breakout Sessions

- Share and Share Alike:
29 Tools to Create Cool Content for Social Media
Beth Ziesenis
- Building a Powerhouse Board—
Tools for Strategic Leadership and Engagement
Amy Nisenson
- Creating a Culture of Innovation:
It's Not as Hard as You Think
Mark Sedgley
- Potpourri of Risk for Organizations & Associations:
Got Employees? Top 5 HR Traps to Avoid
Mindy Flanigan, PHR & SHRM-CP
Top Legal Risks Facing Associations
Blake Hegeman, CAE

11:45 a.m.–2:00 p.m.

Expo

12:15–1:30 p.m.

Lunch in Exhibit Hall

Passport Prize Awarded

1:30–1:45 p.m.

Meeting Planner of the Year Recognition

2:00–3:30 pm

Afternoon Breakout Sessions

- Share and Share Alike:
29 Tools to Create Cool Content for Social Media
Beth Ziesenis
- Building a Powerhouse Board—
Tools for Strategic Leadership and Engagement
Amy Nisenson



THANK YOU TO OUR 2017 PARTNERS

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Greater Richmond Convention Center
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Hilton Richmond Downtown
Hilton Virginia Beach Oceanfront
Norfolk Waterside Marriott
Renaissance Portsmouth-Norfolk
Waterfront Hotel
Sheraton Norfolk Waterside Hotel
Sheraton Virginia Beach
VisitNorfolk
Visit Virginia's Blue Ridge

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Hampton CVB
Keswick Hall & Golf Club
Lynchburg Regional CVB
MemberClicks
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Omni Charlottesville Hotel
Omni Richmond Hotel
Richmond Marriott Short Pump
Richmond Region Tourism
Sheraton Roanoke Hotel
& Conference Center
The Tides Inn
Virginia Beach Resort Hotel
& Conference Center
Wyndham Virginia Beach

MEMBER SPOTLIGHT

Anne Gardner, CAE, RCE

CEO, Charlottesville Area
Association of REALTORS



What are you working on that is new and different?

Our organization is implementing a rebranding effort which is a culmination of a year-long dialogue with members to uncover the value they place on affiliation with our association. This was the source for a campaign and collateral rolling out this summer and it hit the mark with members.

What do you like most about your job?

I thrive on the fact that no two days are ever the same in our business. The work is varied and challenging. I may be working on a new building renovation project, filing paperwork for a new foundation for the association, or calling on our state and national legislators to advocate for private property rights protections...all in the same week.

What is your greatest challenge at work?

My greatest challenge and reward is in the development and growth of a talented staff team. Every effort I spend with staff to hone their skills and develop their projects in a supportive and collaborative environment is paid back to the organization, and to me, tenfold.

What success stories do you have with communicating with your membership?

When our association launches a project in direct response to a challenge the members are facing, the pick-up and open rates are very high. This validates the priorities for the board as they continue to pave the way for the association.

What do you enjoy doing in your time away from work?

I travel to the beach on many weekends and love to train our newest addition to the home, a 6-month-old Labradoodle pup named Chewbacca (Chewy). I hope to have him trained as a therapy and comfort animal for hospital and nursing care visits.

What sports/teams do you root for?

Being a life-long Pittsburgh Steelers fan has made me more friends across the country than I can count. We are a loyal bunch, for the good years and the bad.

What drew you to the association industry?

I was drawn to association work through a powerful sense of community and civic service which was instilled by my mother. She was always active as a volunteer in our hometown and I was often her helper at events. After college, I learned about associations and the amazing work they can do for professions and trades. The first group I worked with was dedicated to worker health and safety, and I found their work to be noble and highly necessary.

Three Indulgences...One Convenient Location

Shula's America's Steak House Work, Play, Dine

Celebrate life's special moments in the atmosphere created by someone who knows perfection—Coach Don Shula.

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AMERICA'S
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Experience 4-Diamond Service in Richmond's hottest location. Meet with success while offering your attendees and their guests world class shopping and dining, or visit Richmond's many venues—all within minutes of the hotel. Relax in *Aura*, Indulge in *Shula's* and host a very successful Meeting!

Aura Spa & Salon Relax, Rejuvenate, Refresh

Our Chromatherapy-inspired Spa & Salon offers a full compliment of services designed to pamper and rejuvenate. Incorporate Wellness into your program, earn Meeting Planner Credits, or gather on the Sun Deck for a relaxing evening around the Fire Pit.



aura

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SHORT PUMP



BOARD ROLE IN ASSET PROTECTION

In a meeting of the components of a national association, odds are good you will hear the whispers, “Did you know about the embezzlement at XYZ association?”

The amounts are sometimes staggering, exceeding \$1 million. Equally surprising is how the board was oblivious to the losses occurring over multiple years.

The responsibility is shared between the Board of Directors and professional staff. As partners and fiduciaries on behalf of the membership they are charged with protecting resources.

When asked about the budget, directors may stutter. Or say, “Staff watch the budget for us.” I asked a Treasurer about the size of the organization’s budget and she responded, “I have not looked at it recently, I do not really know.” (It was a million dollar association.)

Some directors hone in on the smaller line items. (“What is this \$75 expense?”) Many do not know the size of the annual budget, the largest line items, and the value of assets. These three numbers would be the start for protecting resources.

DIVERSIONS

Reporting a loss of funds is a requirement of the IRS on Form 990. The agency describes a diversion as any unauthorized conversion or use of assets other than for the organization’s authorized purposes, including but not limited to embezzlement or theft.

Form 990 requires reporting diversions by officers, directors, trustees, employees, volunteers, independent contractors, or any other person. Most are attributed to theft or embezzlement, sometimes leading to the loss of tens of millions of dollars to a single organization.

A *Washington Post* article in 2008 highlighted the “thefts, scams, and phantom purchases” in non-profits. The analysis identified more than 1,000 non-profit organizations reporting a “significant diversion” of assets on Form 990. The article reports the IRS said 285 diversions totaling \$170 million had been disclosed in one year alone.

BOARD OVERSIGHT

There are many tools and processes available for a board to protect resources.

Form 990 – This is an annual informational report required by the IRS of nearly all exempt organizations. Averaging 25 pages, board members can glean a lot about income, expenses, assets, and programs. Give it a good read. It is expected that the governing body reviews it before submission.

Audit – An audit is generally defined as a review of the organization’s financial situation by an independent outside professional. Look for the organization’s policy on the frequency and type of audit required. If it does not exist, inquire why not. When an audit is completed and presented to the board, review it carefully and ask questions of the auditor.

Policies – There should be numerous policies regarding finances. For example, check signatories, credit card use, and requirement of receipts for reimbursement. Be sure the policies are in place and followed.

Access to a CPA – If directors need more information to better understand financial matters ask a CPA to address the board. Topics might include IRS requirements, policy safeguards, audit options, and Generally Accepted Accounting Principles.

Big Picture – Directors sometimes micromanage by inquiring about the smallest line items. The attention should be on the big picture.

Dashboards – Graphics reduce the time spent on listening or reading reports. Improve financial understanding with dashboards

Are you worried about your association’s risk? Attend VSAE’s Educational Symposium & Expo on October 5 for the breakout session, “Top Legal Risks Facing Associations.” Registration information can be found on page 4 of this newsletter and at vsae.org/expo.

Budget Approval – The budget is a projection of income and expenses for the year, approved by the board. The elected Treasurer has a duty to keep the board informed of discrepancies in the budget. Directors should be articulate about aspects such as the size of the budget and the major income and expense items. The budget is a year-round tool of the board.

Financial Reports – Directors should receive a financial report at every board meeting. Review it carefully, and be ready to ask questions about trends and performance. If the report is missing, ask why and get assurance it will be provided shortly after the meeting. Let the minutes reflect that the board received, reviewed, and accepted the report.

Responsibility – Directors must accept they have responsibility for financial management and asset oversight. Do not assume that a committee, Treasurer, or staff are taking care of matters.

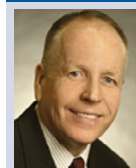
designed as pie charts and graphs comparing dues to non-dues income, savings to budget, dues renewals, and membership growth.

Internal Controls – Practices should be in place that protect assets. From secured check books and separation of duties, to limiting petty cash, be sure safeguards exist.

Finance Committee – Spread the responsibility from the Treasurer to a broader group of directors serving on a committee. Having several eyes on the books and financial matters is advantageous.

Avoid stories of diversions and embezzlement with a board that understands the responsibility and tools for financial oversight.

ABOUT THE AUTHOR



Bob Harris, CAE, facilitates strategic planning on board orientation and provides free governance tips and templates at nonprofitcenter.com. Write him at bob@rchcae.com.

PARTNER HIGHLIGHT:

BOOK YOUR NEXT MEETING IN THE ROANOKE VALLEY IN VIRGINIA'S BLUE RIDGE

The walkable downtown district appeals to all the senses. Between the sounds of live music in Elmwood Park and local bars, delicious flavors at local restaurants, getting to touch iconic steam locomotives at the Virginia Museum of Transportation, smells of the Historic Roanoke City Market, and beautiful sites like the one offered from the rooftop patio at Center in the Square, you will find a new adventure around every corner.

Virginia's Blue Ridge also features a mountain playground of outdoor recreation, with easy access to world-class mountain biking at Carvins Cove, hiking along the Appalachian Trail, and waterways such as the Upper James River Water Trail and Roanoke River Blueway.

The region boasts all the amenities and resources for hosting meetings and conventions, including two civic centers and an IACC-approved conference center.

With over 5,000 guest rooms and 683,000 square feet of unique meeting space, the region is well-suited to accommodate groups of all sizes.

Attendees will love getting to take part in the collection of group-friendly tours and activities, including opportunities for team-building and communication exercises at outdoor adventure courses, or more light-hearted options such as a craft beer tour or historic food tour. Local outdoor adventure companies such as Roanoke Mountain Adventures and Twin River Outfitters can provide the perfect guided outing.

The Roanoke Valley also offers a vibrant nightlife scene. On any given night, you will find local bands playing at restaurants, clubs, and local breweries throughout the region. The music scene is an eclectic mix of jazz, blues, rock, and folk. If you are in downtown Roanoke,

VISIT VIRGINIA'S BLUE RIDGE



follow the sounds you will likely hear jamming at venues like Martin's Downtown Bar & Grill, where great music is always on the menu.

From the boardroom to the brewery, this is a destination where connections are made.

Virginia's Blue Ridge is easily accessible via Interstates 81, 64, and 77, in addition to U.S. Routes 220 and 460. The region is less than three hours from Richmond, four hours from Alexandria, and five hours from Virginia Beach. There are also eight access points to the Blue Ridge Parkway—America's favorite drive.

The natural beauty and extensive amenities are combined with first-class service provided by the meeting professionals and hospitality industry



in the area. Guests will feel right at home in Virginia's Blue Ridge, and the quality of life in the region is highlighted by the quality of the people who live here.

To learn more about bringing your meeting to Virginia's Blue Ridge, visit visitvbr.com/meetings or call (540) 362-7848.

RISE & SHINE
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VIRGINIA IS FOR MOUNTAIN LOVERS

ROANOKE

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AROUND THE COMMONWEALTH

The Crowne Plaza Richmond Downtown has undergone a multi-million dollar renovation and has converted to the Delta Hotel brand. It is now **Delta Hotels by Marriott Richmond Downtown**.

Congratulations to **Ashley Woodlief Hinkle**, Senior National Sales Manager at Visit Virginia's Blue Ridge, on her marriage to Jordan Hinkle on June 9.

MEMBERS ON THE MOVE

Angela Davis is now the Director of Group Sales with Fort Magruder Hotel and Conference Center.

Brad Jones is now the Director of Sales with Four Points by Sheraton Richmond.

Ashley Lee is now the Director of Sales with Delta Hotels by Marriott Richmond Downtown.

Amy Sales, CMP is now an Associate Director with Easter Associates, Inc.

HEALTH CARE CORNER



Many employers are increasing their employees' health insurance deductibles, co-pays, and out-of-pocket maximums in order to keep health insurance premiums affordable. Employees are looking for ways to close these financial gaps. A new BenefitsPro survey found that 83% of workers with healthcare coverage would enroll in a voluntary benefits program without expecting their employer to pay for it. Please reach out to me and learn more about the coverage gap protection and tax advantages of voluntary employee benefits.

Monty Dise | (804) 423-7700
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Art and Editorial Deadline
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August 20

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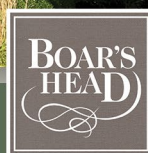
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With 175 rooms plus 22,000 square feet and 573 acres of flexible indoor and outdoor space, the possibilities for meetings are endless! October of 2017 will also bring a fully renovated ballroom directly attached to the Inn. We'd love to meet with you! For more information call (434) 977-2227 or email us at meet@BoarsHeadInn.com.

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