



— VIRGINIA SOCIETY of —  
ASSOCIATION EXECUTIVES

# YOUR *association* PRESS

OCTOBER 2017

## HOW TO CHOOSE THE RIGHT AMS

Join your fellow VSAE members on Friday, November 3 at the **DoubleTree by Hilton Richmond-Midlothian** for the November Monthly Luncheon & Seminar. Moira Edwards, CAE will be presenting, **"Choosing the Right AMS for your Association,"** where she will examine the full process for an association to choose and implement a new association management system (AMS).

Attendees will emerge with a draft project plan, including who to include in the project, the specific steps to take, a draft timeline, and a list of available systems that might suit their association.

During the luncheon, Moira will present, **"5 Top Trends Impacting Association Technology."** Some associations are beginning to focus on the use of innovative new technologies including artificial intelligence, virtual reality, interactive

voice response, and blockchain technology. Others are ramping up their technology foundations through cloud-based solutions, stronger data analytics, and integrated online learning. Linking the two are human-centered concepts such as design thinking, usability, and personalization. In this presentation, attendees will take a tour through the five most urgent of these concepts to be prepared for what's coming next.

Moira Edwards, CAE is the President of Ellipsis Partners and focuses on the impact of technology on organizational strategy. Moira joined Ellipsis Partners after 15 years as an association staffer and leader. She volunteers with ASAE and is the current Chair of the Technology Council. Hailing from Dublin, Ireland, she holds a BA in Business & Economics, an MS in Psychology, and is a Certified Association Executive (CAE).

## NEXT EVENT

### NOVEMBER MONTHLY LUNCHEON & SEMINAR

Friday, November 3  
DoubleTree by Hilton  
Richmond-Midlothian

Speaker:  
**Moira Edwards, CAE**  
Ellipsis Partners

#### SCHEDULE

Registration 8:00 a.m.

Seminar 8:30–11:00 a.m.

#### "CHOOSING THE RIGHT AMS FOR YOUR ASSOCIATION"

Reception 11:00–11:45 a.m.

Luncheon 11:45 a.m.–1:15 p.m.

#### "5 TOP TRENDS IMPACTING ASSOCIATION TECHNOLOGY"

Register online at  
[vsae.org](http://vsae.org).

## Educational Symposium & Expo a Success!

The **2017 Educational Symposium & Expo**, held on October 5 at the Greater Richmond Convention Center, was full of high energy with 140 participants and five engaging educational sessions.

The event, which is Virginia's only tradeshow dedicated to the association industry, featured over 60 exhibitors, including hotels, resorts, CVBs and other companies offering products and services. Beth Ziesenis, "Your Nerdy Best Friend" gave a hilarious and helpful keynote on the game-changing tech tools you need to function more efficiently.

The event included recognition of the **2017 Virginia Business Meeting Planner of the Year**, which was awarded to **Tracie Grady**, Vice President of Operations and Meetings for Eisenman & Associates, Inc.



*Tracie Grady accepting her award with Bernie Niemeier, Publisher of Virginia Business, and Brandon Robinson, Executive Director of VSAE.*

Congratulations to **Chandler Owdom** of the VA Bankers Association, who was the Passport Prize winner. Chandler won a year of VIP experiences in Richmond, compliments of **Richmond Region Tourism**.

A special thank you to the event host, partners and sponsors, and to all who participated.

## LAST CHANCE!

Do you still have a 2017 Seminar Pass to use? The November meeting is your last chance to use it this year. Be sure to use it or share it to be used by registering at [vsae.org](http://vsae.org).

## UPCOMING EVENTS

### Community Service: Homeward's Project Homeless Connect

Tuesday, November 14  
Greater Richmond  
Convention Center

### Awards Luncheon & Silent Auction

Friday, December 1  
Hilton Richmond Hotel & Spa  
at Short Pump

Check out all events at  
[vsae.org/upcoming-events](http://vsae.org/upcoming-events).

# MEMBER SPOTLIGHT

**R. Corey Clayborne, AIA**  
Executive Vice President  
American Institute of Architects, Virginia

## What do you like most about your job?

I really enjoy the association service aspect of the position. My job is to serve our members and that is an exciting task to do each and every day. I also enjoy traveling around the state getting to know our members and seeing the exciting projects our architecture firms are working on.

## What is your greatest challenge at work?

Keeping over 2,300 members happy by delivering exceptional services.

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

Be seen. Get out there and physically be with your members. Our organization has five local chapters and I try to attend their key events.

## What is the biggest issue facing you as an association executive?

Maintaining exceptional value in the perception of our members, doing more with less resources, and finding viable and sustainable non-dues revenue streams.

## What are you most proud of?

My wife is the co-founder of the Charlottesville Ballet. It has grown from a \$50,000 non-profit to being in arms-reach of a \$1 million organization in 10 years.

## How do you recharge?

Having a Saturday or Sunday where nothing is planned and I go wherever the day takes me.

## What's on your music playlist?

Grown-folks music like R&B and smooth jams.

## What sports/teams do you root for?

Virginia Tech Hokies in everything.



## What's your favorite movie genre?

Comedy. I am guaranteed to cry from laughing so hard when I watch comedians like Kevin Hart.

## What 3 words best describe you?

Driven. Fair. Competitive.

## What's the most important lesson you've learned in the last 3 years?

A work/life balance is critically important for both physical and mental health. Finding that delicate balance that allows you to excel in your career but still allows you to invest and nurture other relationships is quite powerful.

## What piece of advice would you give someone new to the association world?

Network. Network. Network. Whatever challenge you are navigating at the time, it can almost be guaranteed that another association executive has encountered the same obstacle. There is a wealth of knowledge, particularly in VSAE, that is always available as a resource.

# WE WANT YOU!

The Nominating Committee is now accepting nominations for the **2018-2019 VSAE Board of Directors**. The board, comprised of 15 directors, helps set the strategic direction of VSAE.

The committee is looking for candidates who want to give back to the association community and have input in the future direction of VSAE.

If you meet the qualifications to serve (member in good standing for 3 years or more and have been involved in a broad base of activities), you are encouraged to apply.

Visit [vsae.org/leadership](http://vsae.org/leadership) to download a Candidate Form. Complete the form and send it to the VSAE office by **November 17**.

Questions? Call Brandon Robinson, CAE at (804) 249-2234 or write him at [brandon@vsae.org](mailto:brandon@vsae.org).

# 2018 MEMBER DUES

Renewal notices for 2018 VSAE member dues will be going out in the coming weeks. There is no increase in dues for 2018. The following are the membership dues rates.

## EXECUTIVE

1-2 .....	\$330
3+ .....	\$165
Non-Resident .....	\$280

## ASSOCIATE

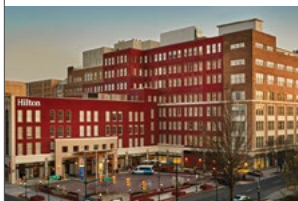
1-2 .....	\$535
3+ .....	\$280

## SEMI-RETIRED

1 .....	\$ 60
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# Building a 'Foresight First' Board of Directors

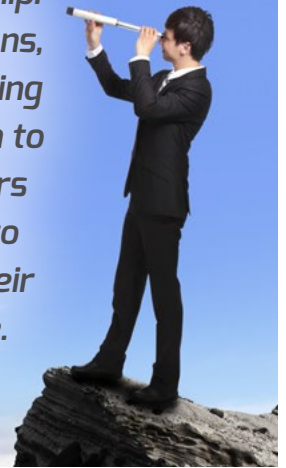
Association boards in every field of human endeavor continue to grapple with the increasingly complicated, sometimes complex, and frequently difficult decisions required to build their organizations to thrive in the years ahead. The unforgiving nature of this emerging context makes now an appropriate time to reflect on the most generative governing orientation association boards can adopt to prepare their organizations for the future. This process will require all association decision-makers to challenge their orthodox beliefs and adopt a more useful definition of governing: ***an intentional and dynamic process for enabling the coherence, capability, and continuity of the system.***

The growing influence of powerful technologies is driving a “mobile first” and, more recently, an “AI first” world, an inescapable imperative for organizations to place primary emphasis on the interfaces of greatest impact on their stakeholders. Similarly, in a time of profound, intense, and accelerating societal transformation, the definition offered above demands that association boards embrace a “foresight first” approach to governing to maximize their ability to learn with, anticipate, and prepare for a full range of plausible futures, including the most unfavorable and even unthinkable possibilities.

## WHY FORESIGHT MATTERS

Why should association boards adopt a foresight first orientation? To answer that question, we need to explore three fundamental reasons why foresight matters to associations and must be handled as both a sacrosanct responsibility of board service and a moral obligation to the stakeholders that boards serve.

*Without foresight, there can be no stewardship. For far too many boards, including associations, non-profit, and corporations, the choice to bring a short-term focus and data-driven approach to governing can deprive senior decision-makers of the more holistic perspective they need to make genuinely wise choices to help both their organizations and their stakeholders thrive.*



**Foresight is an essential practice for building stakeholder trust.** According to a recent Gallup poll, the American people have a very low level of confidence in several national institutions, including the government, media, and big business. Associations cannot afford to join their ranks, which is a genuine concern if their primary focus is on addressing internal organizational challenges instead of working on stakeholders' problems, needs, and outcomes. After all, association stakeholders invest themselves and their limited resources in associations largely on a discretionary basis, and most have abundant access to good enough and even superior solutions, services, and support through their own network connections. Associations must make a more empathic case for why their stakeholders should enter into relationships with them in the first place.

The work of foresight can help redefine the way associations build lasting relationships with their stakeholders through a focus on trusted and mutually beneficial co-creation. By prioritizing the effort to understand and prepare for a full range of plausible futures, association decision-makers can develop actionable insights for creating distinctive value. In collaboration with stakeholders and their networks, the board can develop strategies and design business models that are both resilient

against the forces of transformation and adaptive to shifting conditions.

**Foresight is a fundamental act of stewardship.** At a time when many observers place a premium on shaping the actions of individual leaders, effective governing in The Age of Transformation requires association boards to adopt a truly collective approach to building thriving organizations that is grounded in a shared sense of responsibility for stewardship. As stewards, boards must be able to set aside political concerns and personal considerations so they can work together to leave their organizations better than how they found them. This kind of cooperation is critical to building a strong team dynamic within association boards that can help inspire other stakeholders to make their own unique contributions to stewardship.

Without foresight, there can be no stewardship. For far too many boards, including associations, non-profit, and corporations, the choice to bring a short-term focus and data-driven approach to governing can deprive senior decision-makers of the more holistic perspective they need to make genuinely wise choices to help both their organizations and their stakeholders thrive. Association boards operating as stewards, however, benefit from taking the long view and gathering and situating valuable learning in a more expansive context so they can develop a much

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> **FORESIGHT**, continued from page 3

richer understanding of the environment in which their organizations will operate in the years ahead.

**Foresight is an intentional process of learning with the future.** Whether association boards realize it or not, their decision-making processes are influenced significantly by largely invisible and often counterproductive assumptions about their organizations and stakeholders, as well as the world around them. In some cases, these orthodox beliefs have been in use for years or decades and are still deeply felt by many stakeholders even though they are no longer true or helpful. Orthodoxies are significant obstacles to the serious, on-going learning that all association decision-makers must pursue in a time of societal transformation, and need to be carefully examined and questioned at every opportunity.

Association boards can develop a consistent practice of foresight through which they pursue a cycle of learning defined by the three connected practices: 1) sense-making, i.e., building an intellectual understanding of plausible futures through thoughtful exploration, inquiry, and dialogue, 2) meaning-making, i.e., probing the specific positive and negative implications of plausible futures for their associations, stakeholders, and fields of work, including their impact on orthodox beliefs, and 3) decision-making, i.e. bringing both intellectual understanding and real-world meaning to bear on present-day decision-making with the intention of anticipating and preparing for a full range of plausible futures. Decision-making is not the end of learning, but the beginning of the next and all

subsequent learning cycles that boards will pursue as they continue to guide their organizations through societal transformation today and in the years ahead.

### GOVERNING FORESIGHT FIRST

From the beginning of the effort to build “foresight first” boards, association board presiding officers (BPOs) and other officers, directors, and chief staff executives (CSEs) must internalize and unite behind three critical commitments. This transition from a more traditional governing orientation will require considerable care, prudence, and focus to ensure it is fully implemented and sustainable over time.

**Commit to identifying, selecting, and developing foresight first directors.** While traditional board selection criteria typically emphasize director skill sets, governing foresight first is mostly about identifying directors with the right mindsets. This approach to governing requires directors who are comfortable with complexity and uncertainty, and who bring insatiable curiosity, a high degree of humility, and a willingness to express personal vulnerability. In short, association boards need people who are demonstrably more enthusiastic and capable learners sitting in every seat. Governing foresight first is also another admonition to association boards that they must work harder to become truly diverse and inclusive along every conceivable dimension to maximize their ability to learn with the future.

Selecting potential foresight first directors must be a rigorous process that fully reveals their fitness for board service. Societal transformation has

raised the stakes for all associations, and those making a voluntary choice to serve also must make the crucial choice to bring all their capabilities to the board table at all times. Once foresight first directors are selected, all directors must participate together in challenging board development experiences that build their capacity and fully prepare them to pursue the work of foresight.

**Commit to adopting a foresight first governing intent.** The usual outcome of strategy as an exercise in planning is a strategic plan, customarily a rather long, detailed document that is much less useful in a world experiencing accelerating transformation than perhaps it was in the far more stable and predictable environment of strategic planning’s heyday more than 50 years ago. In contrast, the outcome of strategy as a process of learning is strategic intent, which is best expressed as a shared organizational understanding of the outcomes that strategy intends to achieve, with necessary adjustments, adaptations, and pivots made based on learning with both association stakeholders and the still unfolding future.

To make clear what outcomes they are trying to achieve through their stewardship, foresight first boards can express their “governing intent” through a stewardship statement. The stewardship statement is a useful way for boards to crystallize the deeper significance of their work for themselves, as well as for staff and other voluntary contributors, and to communicate clearly about the critical role that foresight plays in achieving the full impact of effective stewardship. Making a strong link between governing intent and strategic intent will help unlock the full potential of the foresight first approach to governing.

**Commit to designing a foresight first governing process.** If they observe the necessary legal and administrative constraints created by governments at all levels, watchdog groups, and other interested players in the association/non-profit sector, governing can be a compelling design opportunity for



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associations. The foresight first approach offers association boards and CEOs a learning-focused platform from which to rethink every aspect of the board governing process and workflow to minimize wasted resources and maximize the impact of the energy and attention that all contributors devote to the work.

Of special significance in designing a foresight first governing process is ensuring a disciplined focus on the future, which means key decision-makers will need to consider the most appropriate methods for handling board work that is more retrospective in its content, such as financial reviews, with the highest standards of oversight integrity and quality while not distracting from governing intent. In addition, BPOs, other officers, and CSEs will want to think with their boards about effective ways to organize for foresight first work, especially the presentation of board learning and information resources in more visually appealing, understandable, and actionable forms.

In the words of the late Barbara Jordan, a former United States Representative from Texas, "for all of its uncertainty, we cannot flee the future." Associations and their boards are no exception. The age of transformation is upon us and it is long overdue for both staff and voluntary participants in the work of governing to fully understand and accept this vital fact. Right now is the time for all associations to begin building foresight first boards that can help navigate their organizations, stakeholders, and fields through the powerful uncertainties and exciting possibilities of the arriving future. Is your association's board ready to take its work to the next level?

## ABOUT THE AUTHOR



**Jeff De Cagna, FRSA, FASAE**  
is Executive Advisor for  
Foresight First, LLC in  
Reston, VA.

He can be reached on chat:  
[chat.center/foresightfirst](https://chat.center/foresightfirst)  
or on Twitter:

[@dutyofforesight](https://twitter.com/dutyofforesight)

An earlier version of this article appeared in the November/December 2016 issue of CalSAE's *The Executive Magazine*.

## Leadership reflections



**Brandon Robinson, CAE**  
VSAE Executive Director

## VSAE's Educational Events can create "a ha!" moments

One of my favorite parts of VSAE's events is learning from the members who attend. VSAE's Education Committee does a tremendous job attracting top quality content leaders. If you have not attended an educational event in awhile, you are missing out. However, for me, often what makes VSAE's events so amazing are the ideas and takeaways I see members share among one another.

Recently, I asked three members to share their takeaways from the CEO & Senior Staff Retreat.

*As leaders, we find ourselves on an island by ourselves. It's refreshing to know that we are not alone, our challenges are not necessarily unique to our own associations. It's nice to be able to share common issues in a trusted environment with real-life solutions.*

**Ray Mattes, CAE, President & CEO, Retail Alliance**

*In regards to Jeff De Cagna's presentation, I really loved the perspective of "foresight." The question I am asking myself after is how do we get boards to become more proactive with the needs of the association rather than reactive. How do we get board members to think beyond the issues that are presented the day of the board meeting and start to solve future issues so that the association can stay relevant, ahead of the industry, or be even more innovative?*

*In regards to the roundtables, I was reminded what it takes to get people to perform: written roles and responsibilities, goals and aspirations, monthly meetings, measures/metrics and mentoring (accountability), etc., and realized that I had not applied it to my own team lately. What an "a ha!" moment.*

**Jim Roman, Association Leadership Institute**

*My "a ha!" moment came at the end of the retreat when I realized that I had been hearing over and over again from every speaker and my fellow association professionals that it is critical to focus our efforts on those things that we can do really well. It will not serve me, my staff, or my association well to just "keep doing things because we've always done them." Focus is the name of our game!*

**Katie Frazier, President, Virginia Agribusiness Council**

Our "learning" is only enhanced by sharing our experiences. What have you learned at VSAE? How have you applied what you have learned? We would love to hear. Write me at [brandon@vsae.org](mailto:brandon@vsae.org) and let me know.

Lisa would LOVE to book your next meeting or conference in Lynchburg!



(434) 485-7295 / [Lisa.Meriwether@LynchburgVA.Gov](mailto:Lisa.Meriwether@LynchburgVA.Gov)

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## WELCOME NEW MEMBERS

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American Institute of  
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Richmond

**Merry Beth Hall**  
PHCC Educational  
Foundation  
Falls Church

**Samantha Kenny**  
Easter Associates  
Richmond

**Tara Modisett**  
National Alliance of State  
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**Elizabeth Nelson**  
National Alliance of State  
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**Devon Possanza**  
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**Brenda LeCocq**  
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Raceway  
Alton

**Brent Woodyard**  
The Tides Inn  
Irvington

## EVALUATION SURVEY PRIZE WINNERS

Congratulations to **Steven Bateson** of the VA Association of School Business Officials, who is the SIG-a-Palooza Evaluation prize winner. Steven won a dinner for two at The Tavern at **Virginia Crossings Hotel & Conference Center**.

Congratulations to **Ellen Davenport** of the VA Community College System, who is the September Monthly Luncheon & Seminar Evaluation prize winner. Ellen won tickets to the State Fair of Virginia, compliments of **Meadow Event Park**.



## HEALTH CARE CORNER

The Medical Loss Ratio (MLR) is a provision within the Affordable Care Act (ACA). It requires all health insurance carriers to spend a specific percentage of their fully insured individual and group insurance premium dollars to reimburse health care providers on claims submitted, as well as qualified programs that improve the quality of health care. The MLR requirement for individual coverage and small groups, with those less than 100 employees, is 80% leaving the insurance company with 20% to pay all overhead expenses including profit. Large groups, those with 100 or more employees, have an 85% requirement leaving the insurance company with 15%. If a carrier's overhead exceeds the 20% or 15% level, then the carrier needs to issue a rebate check. MLR rebate checks are typically issued in August and September and go to the employer. Employers need to follow strict guidelines on how the rebate money may be spent. Please contact me with any questions.

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## PARTNER HIGHLIGHT

### More Than a Hotel or Conference Center—It's a Destination

Hilton Norfolk The Main is Norfolk's newest destination and a premier meeting destination on the East Coast. The Main features 300 upper-upscale Hilton guest rooms with floor to ceiling views and The Exchange, an IACC certified conference center with the latest technology, as well as three unique restaurants offering an array of culinary and beverage specialties.

Located in the heart of downtown Norfolk at the corner of Granby and Main Streets, THE MAIN is within walking distance to many of Norfolk's top attractions and best dining. The Main is also easily accessible from Norfolk International Airport (ORF), only nine miles away.

### Demanding Standards for the Most Discerning

Hilton Norfolk The Main's guest rooms are exquisite, including 11 suites, with panoramic views of the Elizabeth River. The eclectic contemporary décor creates a hotel environment unlike any other in Virginia. At Number 1 in TripAdvisor, The Main transcends all standards and delivers an unparalleled guest experience.

The design of The Exchange allows guests and planners unique options for productive meetings with a tiered meeting room, an innovative collaboration room, and two boardrooms.

### An Intersection of Innovative Space & Ideas

The Main features 42,000 square feet of flexible meeting space with two ballrooms, including the largest ballroom in Virginia with an 18,500 square-foot grand ballroom, plus an abundance of pre-function space.

The Exchange is a technologically advanced, state-of-the-art conference center with dedicated professional staff, flexible room configurations, and classrooms that intentionally open to "think tanks" where ideas and dialogue can be exchanged.

For meetings ranging from 10 to 2,000 attendees, The Main offers the perfect space for productive and enhanced



meetings in upscale surroundings, as well as thoughtful details such as built-in registration desks and continuous break stations.

### Take in the Views and Delectable Cuisine

Offering three diverse restaurants – Varia, Saltine, and Grain—The Main is the central meeting point for office lunches, savory dining, after-hour drinks, special events, and everything in between.

**Varia**—A modern Italian trattoria restaurant allures guests into a sophisticated and eclectic modern design. The dining room culminates in a large millwork library featuring hidden doors in the bookshelves that lead into an ultra-private dining room for exclusive events.

**Saltine**—This street-level restaurant and bar is an urban seafood bistro. A raw bar showcases the region's finest oysters, clams, shrimp, and lobster.

**Grain**—This rooftop beer garden features the largest selection of local craft beer in the area. The 10,000 square-foot space includes an oversized fire pit, a stage for live acoustic music, and spectacular views of the Elizabeth River.

## READY TO BOOK?

**Michelle Catalla**  
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## AROUND THE COMMONWEALTH



**Linné Dilorio, CMP**, won this year's J.B. Bostic Torchlight Award. The award is based on the ability of the recipient to motivate others, stimulate volunteer functions, give a sense of direction, and act as a catalyst to cause exceptional results that benefit MPI-Virginia's chapter and operations.

Cathy Grieve, Director of Sales & Marketing with the **Norfolk Waterside Marriott** has changed her name back to her maiden name. She is now **Cathy Drewry**.

The Independent Insurance Agents of Virginia (IIAV)'s Young Agents' Committee was presented with the Outstanding Membership Development Award. This award recognizes excellent achievement in recruiting and maintaining young agent participation in association activities. The program is managed by **Carter Lyons, CAE**, IIAV's Director of Professional Development.

The **Newport News Tourism** office will relocate on October 20 to 702 Town Center Drive, Newport News, VA 23606. Telephone numbers and extensions remain the same.

**Bob Ramsey**, Executive Director of Virginia College of Emergency Physicians, has just recertified his CAE for the 14th time since earning the CAE as number 488 in 1978.

Congratulations to **Brandon Robinson, CAE**, President of Association Management at Eisenman & Associates, Inc. and Executive Director of VSAE, who has been named one of the *Association Trends* 2017 Young & Aspiring Association Professionals.

**Spirit of Norfolk** is excited to announce the addition of Virginia Elite to their fleet—a completely customizable 70-foot private yacht that can accommodate up to 75 passengers, offering elegant, fine dining cuisine on the Elizabeth River. It is available to charter mid-October 2017.

Congratulations to the Home Builders Association of Virginia's CEO, **Craig Toalson** and his wife Emily, who welcomed a new baby boy into their family on July 31, Michael Hale Toalson.

**Jenny Toomey, CMP**, and husband Kaine, welcomed their first child on July 31. Adelyn Sara was born at 8:50 p.m., weighing in at 7 lb. 12.5 oz. Jenny is the Senior Sales Manager at the **Greater Richmond Convention Center**.

Richmond Region Tourism is pleased to announce that **Jason Whitt**, former Director of Sales for DoubleTree by Hilton Hotel Williamsburg, is now the Convention Sales Manager for Richmond Region Tourism. **Nancy Bass**, Richmond Region Tourism Sales Manager for 11 years, has moved into the National Sales Manager position there.

### 2017-2018 OFFICERS

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