

## SOMETHING NEEDS TO CHANGE AROUND HERE!



Do you come in early and stay late, just to get YOUR work done? Do your teams lack depth and the talent needed to really drive your association forward? Would you like to learn why you're always playing catch-up just to keep up?

Join us on **Friday, June 1**, at **Richmond Marriott Downtown**, for **"Something Needs to Change Around Here: The Five Stages of Leveraging Your Leadership,"** presented by Liz Weber, CMC, CSP, based on her award-winning book. Attendees will learn to identify where to focus leadership development energies, how to change leadership styles to enhance the association's leadership team's performance, and create a process for developing leadership skills association-wide with staff and volunteers.

During the luncheon, Liz will present, **"Leveraging Stage 3 Leadership with Smart Strategic Plans,"** where she will highlight six steps to make your strategic plan clear, concise, and workable so you can ensure your association's continued relevance and success.

Liz's presentations educate and energize audiences, spur thought, and ignite ideas to drive leaders and organizations forward. In addition, she understands the unique challenges of association leadership. Audiences appreciate her engaging humor, down-to-earth style, and content-rich programs.



## Hilton Norfolk The Main Hosts An Outstanding Annual Conference

Nearly 200 attendees joined VSAE at Norfolk's newest destination, Hilton Norfolk The Main, for the 2018 Annual Conference, "Ideas That Work," co-hosted by VisitNorfolk and the Sheraton Norfolk Waterside Hotel. Inspiring content leaders, delicious food and beverage, along with the amazing hospitality of the conference hosts – including a spectacular "steampunk" themed reception and dinner – all combined to make yet another outstanding Annual Conference.

After a choice of pre-conference activities of craft brewery tours or a Norfolk Tides baseball game hosted by VisitNorfolk, the conference opened with a reception at the Sheraton Norfolk Waterside Hotel. While the weather was rainy, attendees' spirits were high and the kick-off reception overlooking the river was the perfect start to the conference festivities.

*continued on page 4 >*

### NEXT EVENT

#### SEMINAR SERIES WITH LUNCH

**Friday, June 1**

Richmond Marriott Downtown

**Speaker: Liz Weber, CMC, CSP**

#### SCHEDULE

8:00 a.m.	Registration
8:30–11:00 a.m.	Seminar
<b>"Something Needs to Change Around Here: The Five Stages of Leveraging Your Leadership"</b>	
11:00–11:45 a.m.	Reception
11:45 a.m.–1:30 p.m.	Luncheon/ Presentation

**"Leveraging Stage 3 Leadership with Smart Strategic Plans"**

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

### UPCOMING EVENTS

#### SMALL ASSOCIATION CEO SIG

**June 12**

Virginia Council of CEOs

#### AMC RETREAT

**July 10**

The Graduate Hotel

#### SIG-A-PALOOZA

WITH BREAKFAST

**August 9**

Virginia Crossings,  
Tapestry Collection by Hilton

#### MEETING PLANNER SUMMIT

**August 16–17**

The Williamsburg Lodge

#### CEO & SENIOR STAFF RETREAT

**September 16–18**

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## LESSONS FROM THE

# SIG

The AMC SIG held during VSAE's Annual Conference brainstormed ideas for case studies at this summer's AMC Retreat (see page 9 for more information). Two case studies will be presented at this summer's event, to be held Tuesday, July 10, at The Graduate in Richmond.

The first presentation will be by **Tom Hardiman, CAE**, and **Steven Williams** of Hardiman-Williams, LLC. They will present a case study on "Non-Management Fee Revenue Streams for AMCs."

The second presentation will be by **Gail Phillips, CAE**, of Organization Management Group. She will present a case study on "Setting Expectations Without Turning Off the Client."

The AMC Retreat, hosted by the AMC SIG, is for both AMC owners and staff and offers 6+ CAE hours.

...

Shared Interest Groups (SIGs) are a great way to learn from fellow association executives. The member-led groups are organized around areas of interest and offer a forum to discuss what matters most to you.

To learn more, visit  
[vsae.org/shared-interest-groups](http://vsae.org/shared-interest-groups).

## Leadership reflections



Brandon Robinson, CAE  
VSAE Executive Director

If you missed this month's Annual Conference, then you missed an amazing event full of great education, stellar networking, and amazing hospitality. You can see all that you missed in the recap article contained on pages 1 and 4 of this newsletter. You also missed the transition of leadership of VSAE from Scot McRoberts to Ray Mattes, CAE and President's Mattes "State of the Association" presentation. Let me summarize it for you; the state of your association is strong.

VSAE is in a great position and is well poised to continue growing to serve the association community both in Richmond and throughout the state. Our vision is to be the best at making our member associations the best. President Mattes referred to VSAE as the gold standard in association management. This is a charge we take very seriously and we are constantly laser-focused on executing against that vision.

One of the primary ways we are realizing that vision in 2018 is the launch of the leadership development program, Association Leadership Virginia (ALV). This group of nine amazing association professionals met for the first time

**"Our vision is to be the best at making our member associations the best."**

on Sunday before the start of Annual Conference. They embarked on a leadership journey together and are already forming the professional bonds that will empower them to grow together for their entire careers. The goal of this program is to begin equipping the leaders of the future with the tools they need to succeed, and it appears this inaugural group is already well on their way towards that end.

President Mattes also talked about the sound financial footing VSAE has that enables it to embark on programs like ALV. VSAE has a substantial reserve fund that can both protect it during the down times and provide capital to invest in the future. This reserve fund is not a license for complacency, however. The board, your staff team at E&A, member volunteers, and regular members like yourself must be constantly striving to be our best, do our best, and engage to make VSAE the gold standard in our industry.

I am personally excited about our future. The state of YOUR association is strong and on behalf of the newly installed Board of Directors, I look forward to continuing to build for the future.

### PLEASE UPDATE YOUR PROFILE!

We are in the process of compiling the **2018-19 Membership Directory and Facilities Guide**, YOUR valuable membership resource.

Because we want the most current information possible, please take a moment to log in to your online profile at [vsae.org](http://vsae.org) to be certain it is up to date.

The most important areas to check for errors are the following.

- |                            |                    |
|----------------------------|--------------------|
| ✓ First Name               | ✓ Organization     |
| ✓ Last Name                | ✓ Address          |
| ✓ Professional Designation | ✓ Email            |
| ✓ Title                    | ✓ Telephone Number |

**THE INFORMATION IN THE DATABASE AS OF JUNE 1  
WILL BE PRINTED IN THE NEW DIRECTORY.**

Look for the **2018-19 Membership Directory and Facilities Guide** in the mail with your August newsletter. If you need help accessing your profile, please call our office at (804) 747-4971.

> **Annual Conference**, continued from page 1

Monday morning's opening keynote speaker was Christine Cashen, who presented "Get What You Want With What You've Got!" Her presentation focused on communicating effectively with different personality styles, how to create a better day with more energy and time, and how to have less stress and more fun. Christine's outgoing personality and energetic take on life left attendees smiling and laughing as the day began.

At lunch, VSAE recognized its newest CAE members and outgoing board members before installing the 2018-2019 Board of Directors. President Ray Mattes, III, CAE, shared with attendees his State of the Association report, including the association's progress to date, a 2018 business plan, and a look at the 2018-19 Officers and Directors. The new President closed his remarks with a quote by Socrates: "The secret of change is to focus all of your energy, not on fighting the old, but on building the new." Outgoing President Scot McRoberts, MPA, IOM, then shared a retrospective of his time leading your association and expressed his appreciation of the opportunity to lead VSAE.

New this year were a total of eight breakout sessions in four distinct tracks – Advocacy, Communications, Leadership, and Meetings – each with a session in the morning and a different session in the afternoon. The new format was well received by the conference attendees, who had a multitude of topics and speakers to choose from when building their conference schedule, making for a customizable education experience.

The increasingly popular IGNITE presentations were a part of the program again this year. IGNITE presentations are short, 5-minute presentations about a topic which ignites a passion in the audience, speaker, or both. Some of this year's topics included growing an association, making a better association executive through volunteerism, learning to adapt and laugh when facing unforeseen set-backs, a journey of cycling, and the best places for "people watching."

The presentations and handouts from several of the conference's content leaders will soon be available on the VSAE website. (See the Events and Education Tab after logging in.)

On Monday evening, after a day of great educational content, attendees could relax, network, and celebrate at the annual Reception and Dinner, where host property Hilton Norfolk The Main wowed attendees and VSAE staff alike with a "steampunk" themed evening, inspired by the Annual Conference logo's spinning gear image. While lavishly costumed characters mingled with guests at the reception, talented aerialist performers were waiting behind the curtain, stunning guests as they entered the dining room area with their performances on the rope and ring that were suspended from the ceiling. The evening was filled with wonderful food, beverage, conversation and entertainment. Afterward, the property invited all guests to Grain, the rooftop biergarten, for an after party with a host bar and bite-size desserts.

Tuesday morning began with breakfast and Shared Interest Group (SIG) meetings, followed by a Closing Session Keynote by Dave Davlin, "The Game-Winning 3: A Roadmap for Professional & Personal Development." Dave's presentation featured an hour of interaction, humor, and audience participation, mixed with a powerful message about finding one's purpose in the world and making an impact.

Thank you to all who attended and all who sponsored the 2018 Annual Conference. VSAE owes its success to all of you. Be sure to mark your calendars now for next year's Annual Conference, May 5–7, 2019 at the Omni Homestead Resort in Hot Springs, Va.





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- 
- Who handles all the logistics for your meetings?
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# NOW ACCEPTING NOMINATIONS FOR THE 2018 VIRGINIA BUSINESS MEETING PLANNER OF THE YEAR

Visit [vsae.org/mpofyear](http://vsae.org/mpofyear)

to complete a nomination form.

Nominations are due by **Friday, July 27.**

The winner will be recognized at the

Virginia Society of Association Executives

**FALL CONFERENCE**

**October 4, 2018** at the  
**Greater Richmond Convention Center.**

Register at [vsae.org/2018-fall-conference](http://vsae.org/2018-fall-conference).



David Hinnant and Tracie Grady,  
the 2016 and 2017 recipients of the  
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## HEALTH CARE CORNER



Great news for sole proprietors and other small business owners effective July 1, 2018. It goes without saying, the individual health insurance market is a mess. Therefore, the passing of SB 672 is a victory for many small business owners. SB 672 revises the definition of “small employer” for the purposes of health insurance to provide that it includes a self-employed person. The measure also provides that an individual who is the sole shareholder of a corporation or sole member of a limited liability company, or an immediate family member of such sole shareholder or member, qualifies as an employee of the corporation or limited liability company if he performed any service for remuneration under a contract of hire for the corporation or limited liability company.

Please contact me to learn more about how SB 672 can help you.

**Monty Dise**  
mdise@apgroupinc.com  
(804) 423-7700

## SURVEY PRIZE WINNER

Congratulations to **Carter Lyons**, Director of Education and Professional Development with the **Independent Insurance Agents of Virginia**, who was the April Seminar Series evaluation prize winner. Carter received an overnight stay at the Delta Hotel by Marriott Richmond Downtown with breakfast.

Be sure to send us your feedback of our Seminar Series by completing the evaluation survey. Your feedback is important to us for planning future successful events.

## MEMBER SPOTLIGHT

**Susan Park**  
Executive Director  
Coastal & Estuarine Research Federation

### What are you working on that's new and different?

I'm really excited about CERF's new initiatives to increase diversity and inclusion in our association and our discipline. We're doing that not only through support of underrepresented minority students, but also by educating our members on how they can be champions.

### What do you like most about your job?

My members. I'm sure everyone says this, but CERF members are incredibly loyal, friendly, and generous with their time; we call ourselves a CERF family, with new “generations” of scientists brought in by their mentors. Our biennial conference is like a weeklong group hug.

### Who have been mentors and/or role models in your life/career?

I'm so incredibly lucky that my predecessor, who was beloved by members, has been willing to mentor me as I've come on board. With no prior association experience, I do not think I could do this without her generous support and encouragement.

### How do you recharge?

Cooking is my favorite way to relax and unwind.

### What drew you to the association industry?

I came from the membership, and really didn't know what the association industry was before I took this job. What drew me to it was a real love for my association, and a desire to see it grow and succeed.

### What advice would you give your younger self?

Do what makes you happy and what you think is right, not what you think others want or expect of you.

### What are your favorite apps for work or play?

I'm fascinated by Twitter for work. It's been an exciting (and sometimes scary) new tool for two-way dialogue with members. For play, I've been spending a lot of time finding design inspiration on Instagram, Pinterest, and similar apps.

### If you could have any superpower, what would it be?

I wish I could teleport to any place in the world. I travel a lot for work, so it would be nice not to be in a plane or car all the time—not to mention how wonderful it would be for vacations.

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

Don't be afraid to ask for help from your peers. As someone who is new to the association world, I can't imagine how I would have survived without the advice and inspiration of other association executives.



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# KAIZEN

## Taking the organization to the next level.

“Can you help us take our association to the next level?”

It is a frequent question among boards and executive directors. Many cite Jim Collins’ book, “Good to Great” to describe a transition to becoming better associations.

### Micro Focus

While every organization wants improved outcomes, this is difficult to do if staff is busy “putting out fires” and board meetings are characterized as “micromanaging.”

For example, the board agenda may include annual conference objectives to enhance industry competency and consumer satisfaction. But conversations quickly drop to the tactical level of coffee breaks and hospitality suites.

Directors lose vision when they focus on minutiae. The adage to best describe the nonprofit environment is, “we can’t see the forest for the trees.” The expression refers to a person or group so involved in the details that they fail to see the opportunities and situation as a whole.

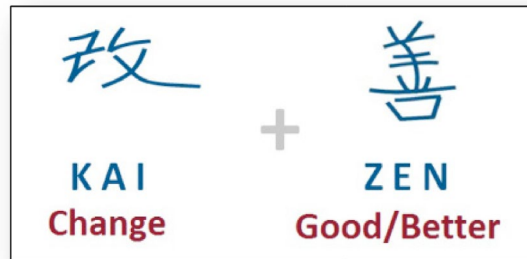
### The Process of Improvement

One must step back to view the “forest” in order to identify areas for improvement. Small enhancements to systems and documents can yield lasting results.

In eastern cultures the process is called KAIZEN. It is the practice of continuous improvement. It is a pillar of an organization’s competitive strategy.

Ben Bolusky, Chief Executive Officer at the Florida Nursery, Grower and Landscape Association says, “Any association naively resting on its laurels in this frenzied world of reshaping forces will swiftly be branded as irrelevant by its members, and get run over.”

To start the process, board and staff should agree that enhancements can be beneficial. Then prioritize a list of processes, systems or documents that may be out of date, cause



frustration, or are simply pointless. Strategize as a team about how to make improvements.

The California Chiropractic Association was founded in 1928, explains elected president, Brian A. Stenzler, MS, DC of San Diego. “Without giving it much thought, our founders created some bureaucratic processes out of touch with today’s members’ expectations, causing us to be much less relevant. Since the board and staff made a commitment to improve the organization, we’ve made great strides. It required the board to be honest about processes and desired outcomes, and to persevere.”

### Ten Elements to Take It Up a Notch

**1 Board Meetings.** Are meetings too frequent or too long? Is the room set-up conducive to conversation and decision making? Is the mission statement visible? Do guests or ex-officio persons inhibit dialog? Has the agenda been crafted to ensure that the board focuses on mission and goals; not just reports and updates?

**2 Bylaws.** If bylaws have become lengthy, inconsistent or hard to read, how can they be improved? Should policies be moved to a policy notebook? Are they compliant with the state’s not-for-profit corporate requirements? Should authority for basic amendments be transferred from the membership to the governing body?

**3 Leadership Manual.** Does the board have access to current documents through a leadership manual distributed annually, or in a password protected portal? Do directors attest or sign that they have received and committed to read? Does it

include organizational charts, calendars, strategic plan, and the essential notices of conflicts of interest, confidentiality, and antitrust avoidance?

**4 Strategic Plan.** Creating the strategic plan is the start of a process that results in a multi-page report. Too often after the retreat it is simply shelved. Transform the plan into a brochure to inform members and prospects. Monitor progress by agreeing upon performance measures. Appoint a plan champion to report on progress periodically.

**5 Director Orientation.** Review the process, content and delivery of orientation. It should be conducted yearly as a refresher for the entire leadership. At that time, conflicts of interest should be discussed, risk awareness considered, commitment forms signed, and access to the governing documents, budget, and strategic plan emphasized. Invite committee chairs and future leaders.

**6 Committee Structure.** Committees should not be sacred cows that cannot be merged or eliminated. There is a trend to replace standing committees with task forces or quick action teams. Be sure every committee has a clear purpose statement, current-year expectations, and performance measures. Do committees align with the goals in the strategic plan? Do they have the support of committee liaisons from board or staff?

**7 Chapters.** Local components can be invaluable in serving members and advancing programs. They are closest to the members but may lack resources. If a network of chapters exists, assess their strengths and weaknesses. Determine the proper structure to ensure they are in legal compliance and have minimum risk. Provide templates and tools for chapters to support effectiveness.

**8 Reports.** Committees and staff reports keep the board informed. Busy volunteers seldom have time to read or sit through a series of oral reports. Move non-



## "KAIZEN...is the practice of continuous improvement. It is a pillar of an organization's competitive strategy."

essential reports to a consent agenda, often saving hours at board meetings. Have the board identify the information it wants tracked so that staff can create dashboard reports depicting trends, successes and gaps. Use external benchmarks to gauge association performance.

**9 Financial Reporting.** Financial reports are best understood when presented in comprehensive, consistent formats. Do minutes consistently reflect the board's acceptance of the reports?

Would pie charts supplement financial reports to improve understanding? Does everyone on the board understand financial statements and budgets? Should a CPA do a refresher course on non-profit financial requirements? Does the board understand their relationship to IRS Form 990?

**10 Governing Body.** The organization relies on the board of directors to effectively govern, not manage. Is the board the right size? (The average is about 15 directors.) Are directors selected based upon competency, or chosen by geography or chapters? Does the board conduct an annual self-evaluation? Has a review of governing structure and documents been conducted recently?

Up organizational performance by identifying processes that can be enhanced.

### ABOUT THE AUTHOR



**Bob Harris, CAE**, provides free governance tips and templates at [nonprofitcenter.com](http://nonprofitcenter.com) and facilitates strategic planning on board orientation. Write him at [bob@rchcae.com](mailto:bob@rchcae.com).

## EXHIBIT AT THE 2018 FALL CONFERENCE

**Thursday, October 4, 2018 • Greater Richmond Convention Center**

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**For more information, visit [vsae.org/exhibitorinfo](http://vsae.org/exhibitorinfo), write Jessica at [jessica@vsae.org](mailto:jessica@vsae.org), or call her at (804) 249-2244.**

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# STATISTICAL SIGNIFICANCE VS. MANAGERIAL SIGNIFICANCE



Organizations conduct research to make more informed decisions. Frequently, associations conduct member surveys to determine members' needs, how individual members benefit from attending the annual conference, how members rate the quality of the association's member benefits, continuing education or advocacy efforts, or perhaps which continuing education programs should be offered.

By segmenting survey responses by various member characteristics (e.g. member type, age/generation, formal education, geographic region, certifications held, member tenure, or employment situation) the board and the management team can determine if different member segments require different solutions, or if one solution is appropriate for the entire membership as a single entity.

The first step in the decision-making process is to determine where responses are significantly different among member segments. This type of significance is called statistical significance.

Statistical significance is a function of the number of individuals who completed the survey, not the percentage of respondents who completed the survey, and it measures the likelihood that the differences between member segments are the result of real differences in attitudes and opinions, and not differences that may be related to chance or sampling error.

The size of the difference that is required to be statistically significant is dependent upon the number of individuals who answered a particular question. The fewer the number of respondents, the greater the difference that will be required to achieve statistical significance.

The statistical significance between two numbers can easily be calculated using software, such as STATS™ 2.0, which can be downloaded

**“Once it has been determined that the differences are statistically significant, the management team can then decide whether the differences are managerially significant.”**

free of charge from Decision Analyst ([www.decisionanalyst.com](http://www.decisionanalyst.com)).

Once it has been determined that the differences are statistically significant, the management team can then decide whether the differences are managerially significant. Managerial significance is the extent to which the difference justifies that management should take some action.

For example, the results of the research might show that male members visit the association website more frequently than female members, and that the difference is statistically significant. It is then up to management to decide whether that information requires further action.

Management will likely first consider reasons why male members visit the website more frequently, and then consider whether or not increasing the frequency with which female members visit the website is a worthwhile goal to pursue.

Not all statistically significant differences require managerial attention, but management should only focus on differences that are first statistically significant.

## ABOUT THE AUTHOR

**Larry J. Seibert, Ph.D.** is the President/CEO of Association Metrics, a research and consulting firm that specializes in voice-of-the-member association research for strategic planning. He can be reached at [larry@associationmetrics.com](mailto:larry@associationmetrics.com) or by phone at (317) 840-2303.

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On the golf scorecard, hole 17 at Kingsmill Resort's River Course reads like thousands of other golf holes in America: 177 Yard Par 3. And that's a shame. It should read: "You are about to play the most historic 177 yards of golf in America. Take it all in. Don't rush. Look around and imagine how this very land played a role in American history starting in 1607."

#### STEPPING INTO HISTORY

Today, when golfers walk between the tee box and the green at the River Course's 177-yard 17th hole, they are stepping on the same land where the original British settlers first stepped off their boat. It was 1607 when the English colonists completed their 144-day sea excursion by landing on the shores of what is now Kingsmill Resort. Gabriel Archer, one of the leaders, proposed they make 'Kingsmill' their home, but sadly, his counsel went unheeded. The next day, the expedition continued west to Jamestown Island, where they could anchor their three ships closer to shore and better defend themselves.

#### SACRED GROUND

More than 150 years later, in 1765, 'Kingsmill's James River embankment' entered the American Revolution when the colonists used Kingsmill's location as a defensive position to defeat the British. Move ahead nearly 100 years to 1861, and the same stretch of 177 yards was repurposed, for its strategic location, during the War Between the States. Today a Civil War cannon and American Flag guard this sacred ground.

#### EARLY DISCOVERIES

But well before aggression – or discovery by early settlers searching for a new home – Native Americans lived here and enjoyed the oysters still plentiful and being served up at Kingsmill Resort's James Landing Grill. From James River oysters to spice from around the world, the old pilings in the river are the location of the original port and



road from the James River to Williamsburg—the Commonwealth of Virginia's first capital until 1780.

#### TRUE AMERICANA

That's 177 yards of history from the Native Americans to the Jamestown Settlers, Williamsburg, the American Revolution, and Civil War to where LPGA players now tee off in the annual Kingsmill Championship. Kingsmill Resort is also the place where President Clinton, Bush (43) and Obama have presented, worked, and relaxed. And while you may not eagle this hole (which would be a hole in one, too), it's quite common to see the American Bald Eagle flying

overhead. They nest on the grounds. Perfectly fitting for the most 177 historic yards of golf in America.

#### HISTORY IN THE MAKING

More than 400 years later conference attendees, golfers, couples, families, and friends arrive at Kingsmill Resort's hallowed ground to make their own history.

#### CONTACT:

For more information, visit [www.kingsmill.com](http://www.kingsmill.com) for specific details or call **Richard Keurajian** at (757) 253-3927 or email [Richard.Keurajian@Kingsmill.com](mailto:Richard.Keurajian@Kingsmill.com).

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## AROUND THE COMMONWEALTH

**Maureen Dingus, CAE**, helped her long-time friend, Jenny Piper, overcome the odds to participate in the Ukrop's Monument Avenue 10K. Jenny has fibromyalgia and has been blind for more than 20 years. Their participation also raised funds and awareness for the VCU Massey Cancer Center, the official charitable partner of the 10K.

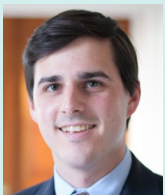
## WELCOME NEW MEMBERS

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*National Alliance of State  
Pharmacy Associations  
North Chesterfield*

**Mary Brown**  
*VA Press Association  
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## ZACH EISENMAN JOINS THE TEAM AT EISENMAN & ASSOCIATES, INC



Effective April 16, Zach Eisenman has joined the team at Eisenman & Associates, Inc. as Account Manager. He will be working primarily with Local Government Attorneys of Virginia.

Zach holds a Bachelor's of Science degree in Political Science from the University of South Carolina. He was previously the Director of Risk Reduction for Sigma Nu Fraternity.

## NETWORK WITH FELLOW ASSOCIATION EXECUTIVES AT ASAE'S ANNUAL MEETING & EXPOSITION

If you will be at ASAE's Annual Meeting & Exposition in Chicago in August (see ad below), please plan to join your colleagues from VSAE and from other states for an attendee reception on **Monday, August 20**, before The Classic. Drop by for the opportunity to connect with your Southern SAE peers and industry partners over munchies and your choice of beer and wine selections.

RSVP at [vsae.org/asaereception](http://vsae.org/asaereception).



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Published by the Virginia Society  
of Association Executives

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Suite 202

Richmond, Virginia 23294

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**Art and Editorial Deadline**  
**for the June/July Issue**

June 8

**Advertising Space**  
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