



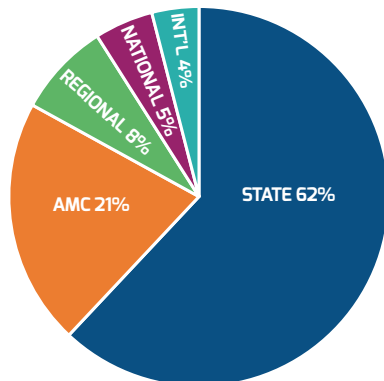
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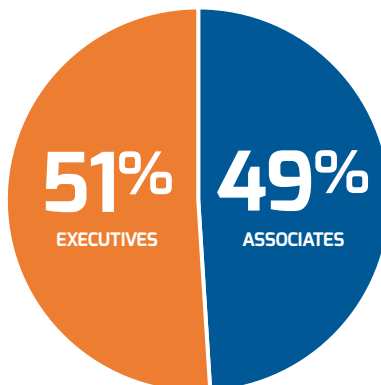
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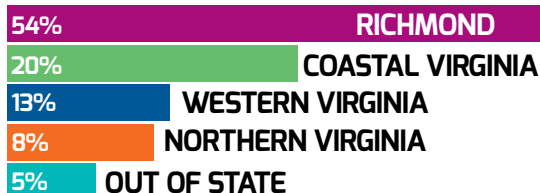
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- ▶ Lunch and Board Installation
- ▶ Luncheon Keynote
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- ▶ Shared Interest Group (SIG) meetings
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## Leadership reflections



Ray Mattes, III, CAE  
President, VSAE

# "We had our wins while overcoming our challenges."

After Executive Director Rick Eisenman requested that I write an article summarizing my tenure as President of VSAE, my first reaction was to present a report card on the litany of items that we, as an association, had accomplished during the past year.

But then I started thinking about the personal impact the presidency has had on me. How does one begin to describe one of the greatest highlights of a career? To be voted and supported to lead an organization comprised of my peers in an industry full of dedicated, passionate, and accomplished leaders is something for which I will forever be grateful.

Speaking of leaders, there are so many characteristics that come to mind: honor, integrity, strength, fairness, selflessness, courage, etc. When I think of leaders I think immediately of board member Danny Mitchell, whose unexpected passing last year was a huge loss for VSAE. He was so selfless with his time and energy. I also think of the countless hours that our VSAE leaders spent on strategic planning, budgets, ALV, member engagement, and our awesome events. Leadership can be an evasive trait not recognizable until confronted with a "defining moment." How one leads during those moments, in my humble estimation, is a true test of one's mettle.

To expand on this thought process, what good is a leader without a team? There are good teams, bad teams, so-so teams, and then there are GREAT teams. We all know that the identity of a team is

defined by its level of teamwork. I have always lived by the creed that great teamwork begins with individual responsibility. You can't help your fellow teammates until you take care of your own responsibilities first and foremost. Our volunteers took care of their own responsibilities in order to take on VSAE responsibilities while also supporting each other. A true testament of great teamwork.

Fulfilling our vision, "To be the best at making associations the best," requires both leadership and teamwork. The VSAE team, comprised of the board of directors, volunteers, sponsors, executive and associate members, and the dedicated staff of Eisenman & Associates, have all contributed to the epitome of great leadership and true teamwork as we pursued our mission and vision.

In summary, we had our wins while overcoming our challenges. During the last year I am proud to report that the VSAE team led with a steady hand while demonstrating the true characteristics of great leadership and teamwork. I look forward to next year, with D Walton as President; Madam Incoming President, Phyllis Errico; and Maureen Dingus as Treasurer. They will be great leaders and will serve admirably.

We all know the phrase "there is no 'I' in team", therefore I humbly thank all those leaders that served during this past year and contributed to one of the proudest periods of my career. Dilly, Dilly!

## EXHIBIT AT THE 2019 FALL CONFERENCE

Thursday, October 3, 2019  
Greater Richmond Convention Center

Plan now to exhibit at one of VSAE's largest events of the year. The Fall Conference attracts not only VSAE association executives, but also social, corporate, and government meeting planners. All exhibitor contracts received and paid by **Friday, May 24** will save \$100 on registration fees (early bird pricing noted below). Booths are 10 x 10 feet except for Booth 7. **For more information, contact Pamela Flynn at [pamela@vsae.org](mailto:pamela@vsae.org) or (804) 249-2244.**

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# Meet Your Incoming VSAE President

Duront “D” Walton, Jr., CAE, Executive Director, VA Telecommunications Industry Association

## What drew you to the association industry?

Pure luck. I went to work for the State Corporation Commission in its Communications Division (Telecommunications Regulations) after leaving Capital One and that role placed me in contact with the Virginia Telecom industry again. The Executive Director at the VTIA was planning to retire and I was asked to apply. It was the classic situation of having the right credentials and being in the right spot at the right time.

**What do you like most about your job?** I enjoy the people and the challenge of varied tasks most of which have to do with affecting an outcome through individuals and groups.

**What is your greatest challenge at work?** At times my role is akin to the proverbial “herding of cats” since my issues and accompanying time frames and pressure points are not necessarily those of my members, whose primary focus is that of customer service, delivery, and the constant revenue-to cost-balance.

**Who have been mentors and/or role models in your life/career?** I’ve been very lucky in that aspect and have had several great mentors. The leaders early in my telephone career, Joe Metzger and Jim Foster, stand out for their personal encouragement and guidance in expanding my job roles and opportunities within what was then C&P Telephone, a part of The Bell System.

## If you could visit any place in the world, where would it be?

I’ve always wanted to visit Egypt, but the political environment and safety concerns since the first Gulf War have made me resort to exploring its treasures through the Egyptian acquisitions of The British Museum in London and the Met in New York City.

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

Aside from my family and the joys of relatively recently becoming a grandfather, for the last decade the sports answer is road cycling and participation in charity rides and events throughout Virginia and the northeast. My participation in the “Conquer the Cobbles” event during the UCI races in Richmond in 2015 probably tops the list.

## What’s on your music playlist?

It’s diverse to say the least. I grew up on what is today termed “Beach Music” and Motown. To that base I’ve added artists like The Stones, Queen, Moby, and Leon Bridges as my go-to sounds.

## What sports/teams do you root for?

I enjoy college basketball in particular with specific support for UVA, Duke (a real dilemma when these two play each other), and VCU.

## What advice would you give your younger self?

Don’t be in such a big hurry to move through the chairs – savor the experiences.

## How do you recharge?

Aside from year-around cycling, I’d say books & the beach, specifically Kiawah Island, and our home on the Chesapeake Bay.



## What’s your favorite movie genre?

I love comedies – pure and simple. Life has enough drama as it is, but what I consider comedy may, at times, thanks to the Cohen brothers, come across to others as pretty dark humor.

## What is the most memorable vacation you’ve taken?

Every vacation at Kiawah Island has been memorable. In the early years of its development the town constructed a marvelous children’s park in the Night Heron area that had a pirate ship centerpiece the size of one of the Jamestown trio. My son “Fox” would gauge his growth over the years by what new feat he could accomplish on the visit that was beyond his grasp the year prior. One year when we returned the park had been bulldozed – apparently a young girl had fallen and broken her arm. The suit that followed prompted the town fathers to completely remove the liability. It was a poignant start to our beach week.

## What’s a favorite family memory that has stuck with you into your adult life? Why?

My favorite childhood memory is of our family trips to Floyd, Va. spending the week on a small “table farm” that our adopted grandparents, Hester & Lillian Sowers, owned and operated just outside that major metropolis. For my brother Thomas and me, two city boys, the realities of a working farm with chickens, a sole cow, and assorted produce gave us a true appreciation of our food sources and reinforced the lessons of responsibility and caring through the example of two loving individuals.

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# Strategic Planning, Meet Strategic Execution

## A strategic plan is only the beginning.

Here are the elements you need to move from the drawing board to the dashboard and put your plan into action.

Strategic planning is the first step in the execution of an overall plan. The strategic plan establishes a key process approach to begin thinking about the future of the organization. If the strategic plan is a process, then what is a logical approach to monitoring and tracking results? The results of a strategic plan live in a dashboard that is customized by the organization executing the strategic plan.

The strategic planning dashboard is a tool that provides a snapshot of the organization's progress to its strategic plan at a certain point in time. It monitors execution from the first day that the strategic plan is deployed within the organization. The dashboard is important in that it does the following:

1. Keeps staff on track and focused on the plan.
2. Provides the volunteer leaders that are champions of the plan's actions a dashboard to monitor progress to the plan.
3. Provides the board with a tool that succinctly sums up progress and allows the board to concentrate on a path moving forward rather than wading through report after report on each strategic item.

What is in a dashboard? The following are key items that are essential in any organization's dashboard.

**Measurable objectives.** List each strategic objective with a measure that makes sense. For example, "achieve 90 percent overall member satisfaction." This makes it clear, measurable and achievable.

**Core competencies.** List the organization's core competencies related to that strategic goal. These are core



competencies that were identified during the strategic planning session. Tying goals to core competencies brings resources that are currently in place to achieve that specific goal.

**Long-term and short-term goals.** List out and identify that specific goal's short-term and long-term action plans. For example, "short-term: establish training on member needs and expectations" and "long-term: reinforce member focus at each level of the organization."

**Human-resource plans.** What is it going to take in terms of staff time and consultants to achieve the goals and objectives set? For example, "improve staff training on members' needs, requirements, and expectations."

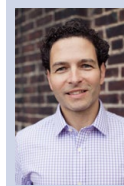
**Key performance indicators.** List your actual and future KPIs. For example, "in 2012, achieve a 90 percent customer satisfaction score; in 2013, achieve a 92 percent customer satisfaction score; and in 2016, achieve a 94 percent customer satisfaction score." Listing

your KPIs and progressively improving them enables the organization to achieve levels on a year-by-year or even quarter-by-quarter basis.

**Outcomes, measures, and results.** Finally, list your outcomes, measures, and results in your last column. What this means is that there are supporting charts and graphs that support your progress to the plan in each area. This visual approach allows an at-a-glance view of progress to the goals.

Taking your strategic plan from the drawing board to the dashboard is very doable and required in order to achieve the goals and objectives set during the strategic planning session. Make it simple to start and build on it every year. There are plenty of dashboard samples online and from your colleagues. There is no need to recreate the wheel when samples already exist. As the English cleric Charles Caleb Colton once said, "imitation is the sincerest form of flattery." Flatter a colleague today.

## ABOUT THE AUTHOR



**Bill Pawlucy, MBA, CAE, IOM,** is president and founder of Association Options, a global consulting company.

He can be reached at [wpawlucy@associationoptions.com](mailto:wpawlucy@associationoptions.com)



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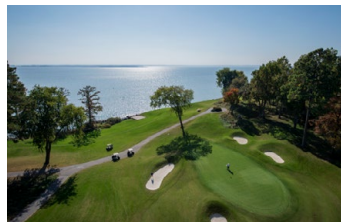
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# Create Your Personal Strategic Plan

Strategic planning isn't just for organizations. A personal strategic plan will help ensure that your career-related and other goals and actions are aligned with what matters most in your life.

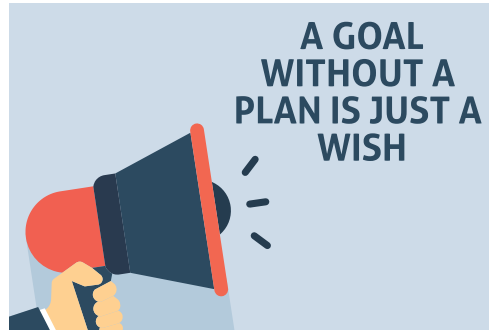
Perhaps you have had an opportunity in your work to lead or be part of creating an organization's strategic plan. The plan, if used properly, is intended to help steer the organization's work over a certain time period. Similarly, some of my clients create a personal strategic plan at the beginning of each year to do much the same thing: Their plan helps guide their personal and professional lives. When used correctly, it provides an anchor for them to connect back to when things change and new opportunities arise.

The best and most relevant personal strategic plan is tailored to focus on what matters most to you. Typically, a plan encompasses career issues (such as ongoing development in your current role, raised visibility in your field, or a job change), finances, health, and key relationships. However, it is fine to include additional topics that are important to you, such as new adventures, travel, or spiritual development.

Here are six steps for creating your own personal strategic plan, whether you do it at the beginning of a new year or at any other time.

**Step 1: Find time.** You need to break away from your day-to-day duties and responsibilities and dream about what you want to accomplish.

**Step 2: Clarify your values.** What do you value most in your life? It is usually easy to identify the first few (e.g., family, health, happiness), but you need to dig deeper for the purposes of a personal strategic plan. Think carefully about



what else you truly value and want to honor. Consider leadership roles in your organization or your community, close relationships and connectivity at both personal and professional levels, recognition or greater influence, time, freedom and flexibility, life/work balance or integration, personal growth, new challenges, wealth, service, and meaningful work.

**Step 3: Create your mission statement.** This is a brief written statement, just a sentence or two, based on the values you want to honor. It is not intended to redefine who you are. Rather, it serves as a reminder of your life's purpose. Your statement is a valuable touchstone that you can use to help guide your behavior and inform your decisions.

## Step 4: Do a SWOT analysis on yourself.

What are your personal strengths, weaknesses, opportunities, and threats? Who could provide you with honest feedback regarding your strengths and weaknesses? What is the economic forecast, both the good and the bad, as it relates to your life and your work?

## Step 5: Create your goals.

As a last step, identify goals that align with the core values you identified earlier. For example, if you identified professional growth or leadership opportunities as values, you could include a career-related goal on your list. Under each goal, include specific action steps and a time frame. Your goals can be broad (grow my career), but your action steps must be specific and time-limited (get a new job in the next three months). I strongly recommend limiting the number of goals and action steps so you can take a realistic approach to what you will accomplish. Typically, three or four goals with one or two actions steps under each is doable in a year.

## Step 6: Determine what support you need

to stay accountable to your plan. Identifying an accountability partner, perhaps a colleague or

*continued on page 8 >*

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> STRATEGIC PLAN, *continued from page 7*

good friend, can help you stick to your plan. Agree on a regular time to check in (it could be a 10-minute call every other Friday). Or schedule a time weekly, biweekly, or monthly to review your personal strategic plan on your own and allow for modifications.

Here are some final tips based on my observation of what my most successful clients do:

- Focus on what is within your control, as opposed to things you cannot control, such as the economy or what your boss does or does not do.
- Highlight the positive outcomes that change will bring, as opposed to looking at what you will be giving up. For example, focus on moving toward good health rather than losing weight.

- Reduce your plans rather than overcommit, and take daily actions, even if they are small, to make things happen.

Creating a personal strategic plan can be transformative. Realize that some changes happen quickly, while other habits take a whole lot longer to stick. The key is to be patient with yourself and know you are moving in the right direction.

## ABOUT THE AUTHOR



**Carol Vernon** is a certified career coach and principal of Communication Matters. She can be reached at [cvernon@commmatters.com](mailto:cvernon@commmatters.com)

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Most associations have a strategic plan, but it may be a plan that sits on a shelf collecting dust. Effective strategic planning involves keeping a close eye on the future state and constant collaboration.

The common struggle for most associations is not how to develop a strategic plan, but asking, “How do we operationalize and use it?”

An effective strategic plan is successful when it’s integrated into all areas of the organization’s culture, structure, and procedures.

How do associations make sure that actions and programs are driving strategic initiatives forward and moving us closer to the future state? It comes down to three key focus areas.

### Organizational Culture

How engaged is the board of directors? How strong is the partnership between board members and association staff? How committed are volunteer leaders to the strategic plan above any individual agendas? These are questions to ask about the organizational culture that can make or break a strategic plan.

A strong relationship between staff and the board is critical, as both play essential roles in the monitoring of the various working groups of the organization. The way in which the organization values individual contributions will set the stage for how people participate in discussions and how committed they are to organizational decisions. This cohesion allows for agenda setting, rather than committees guided by the interests of the chair or members. Organizations that value diversity and inclusion improve the credibility and trust of board members and staff, which then improves the engagement and work of volunteers.

### Organizational Structure

To operate a strategic plan, first you need a supportive organizational structure. In most associations, work of the organization is led by the board and executed by committees, task forces, staff, partnerships, vendors, and other

## From Strategy to Action: Best Practices for Operationalizing Your Strategic Plan

groups. For an organization to have the desired strategic impact in their field, the work of these groups must be aligned with the strategic plan.

But how can an organization make sure that these many groups, charged with vastly different tasks and programs, are in alignment? It takes strong leadership and vigilance on the part of each of these working groups to maintain their adherence to the strategic plan. It’s very easy for committees to veer off track into projects or programs that sound good at the time but are not aligned with the strategic plan. Working groups that operate in isolation or silos, without being accountable to strategy, weaken the overall impact of the organization. Each committee, task force, workgroup, and staff member should develop annual goals that clearly tie back to the strategic plan. These goals should be reviewed and monitored by the board on a regular basis throughout the year. Board and staff members serving as liaisons to committees can play important roles in making sure committees stay on track.

### Organizational Procedures

The process by which a strategic plan is developed, communicated, and executed is critical to its success. The creation of the plan must include a diverse group of stakeholders, including board members, volunteer leaders representing key areas of membership, staff, and possibly key partners or collaborators. Inclusiveness increases the engagement of those that are responsible for the execution of the plan. The plan must be relevant and realistic relative to the scope and size of the organization.

Once developed, the plan must be championed by all, and a systematic process for developing organizational procedures that support and advance the plan must be in place. An approach that is fluid and flexible to changing factors is also necessary.

Having a strategic plan in name only can have dire consequences for an organization. It opens the door to individual agendas, rather than a cohesive agenda. The allocation of resources becomes inefficient and ineffective. Engagement and commitment from the volunteers and staff become more difficult to maintain. Opportunity costs are high.

On the other hand, an effective strategic plan that focuses the work of the organization allows for a more agile and flexible organization.

### ABOUT THE AUTHOR

**Eve Lee, MBA, CAE**, is Executive Director for the American Orthotic Prosthetic Association.



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- 6 CAE hours

## Meeting Planner Summit

August 1-2 | Craddock Terry Hotel & Conference Center

- Two-day conference for meeting planners
- Presentations, roundtable discussions, and networking opportunities
- 6+ CAE hours



## CEO & Senior Staff Retreat

September 16-17 | The Greenbrier

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## Fall Conference

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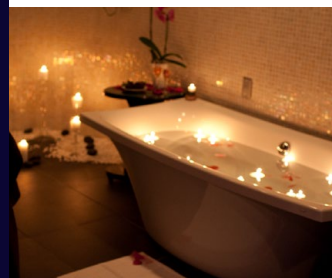
PRIVATE DINING AT SHULA'S STEAK HOUSE

SHUTTLE SERVICE

IN ROOM DINING



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## THANK YOU TO OUR 2019 PARTNERS



### PRESIDENT'S CLUB

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Kingsmill Resort

Marriott Virginia Beach Oceanfront

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Norfolk Waterside Marriott

Omni Charlottesville Hotel

Omni Richmond Hotel

Richmond Region Tourism

The Tides Inn



## PARTNER HIGHLIGHT:

For centuries, it has taken a “meeting of the minds” to inspire, strategize, and motivate change. To host a successful meeting, everything must be in sync—the setting, food, entertainment, and mission. Imagine surrounding yourself with the settings that inspired Thomas Jefferson, George Washington, Patrick Henry, and others as they debated independence. Follow in their footsteps for a successful meeting and blend tradition with contemporary flair at your next event.

### MODERN MEETS CLASSIC

Colonial Williamsburg Resorts offers a unique collection of meeting spaces, social events, and experiences customized to meet your every desire. Accommodations range from moderate to luxurious, with event spaces that accommodate an intimate meeting of 18 to 1,400 attendees in a general session. Total indoor meeting and event space are more than 67,000 square feet with an additional 25,000 square feet outdoors, perfect for receptions and dinners. Colonial Williamsburg Resorts provides a simple solution for today’s complex meeting demands.

### EXACTLY LIKE NOTHING ELSE

The Williamsburg Lodge, Autograph Collection greets you and your guests with southern hospitality and modern amenities. The iconic Five Star, Five Diamond Williamsburg Inn is a high-end summit location that perfectly combines luxurious venues with upscale service befitting the Rockefellers. The Williamsburg Woodlands Hotel & Suites and Conference Center offers an intimate retreat atmosphere with cozy rooms and unique breakout spaces conveniently located near the Historic Area. Discover a getaway of spacious guest rooms with breezy balconies and enjoy Williamsburg’s natural beauty at the Griffin Hotel. Immerse yourself in a vibrant village atmosphere by staying in one of the many Colonial Houses.

### SIP BACK AND RELAX

Colonial Williamsburg’s award-winning culinary team has developed an extensive and delicious array of banquet menu

## COLONIAL WILLIAMSBURG RESORTS



offerings—guaranteed to satisfy any palate. From southern-inspired buffets to freshly made smoothie breaks, the staff will work with you to design the perfect menu for your event. There are more than 19 restaurants, bars, lounges, and cafés located throughout the Resorts and the Historic Area. Unique after-hours events are often hosted in the contemporary Taste Studio offering exciting cooking demonstrations and tasting programs.

### EXPERIENCES TO REMEMBER

Colonial Williamsburg is a resort destination that boasts two 18-hole and one 9-hole golf courses

including the recently renovated Gold Course, a world-class 30,000 square-foot spa and fitness center, four pools (one indoor), eight tennis courts, 50 boutique shops, 20 dining options, and four authentic colonial taverns to choose from.

When it is time to wind down, Colonial Williamsburg Resorts offers a variety of exciting programs for groups, from pub crawls and ghost walk tours to scholarly interactions with Thomas Jefferson and Patrick Henry.

## CONTACT:

### Colonial Williamsburg Resorts

[sales@cwf.org](mailto:sales@cwf.org) • (800) 822-9127 • [colonialwilliamsburgresorts.com/plan/meetings-and-conferences](http://colonialwilliamsburgresorts.com/plan/meetings-and-conferences)



Plan your next conference, trade show, or meeting at Colonial Williamsburg, where you'll have more than enough space to bring your event to life. Explore over 100,000 square feet of event space and endless activities to keep your attendees engaged.

**Start planning your meeting now.**  
Call 800-822-9127 | [colonialwilliamsburgresorts.com](http://colonialwilliamsburgresorts.com)

*Colonial Williamsburg  
Resorts*  
WILLIAMSBURG, VIRGINIA

## AROUND THE COMMONWEALTH



**Michelle Dickinson**, Marketing Communications Coordinator with the **Virginia Assisted Living Association**, is expecting a bundle of joy in October.

**Leigh Dicks** has recently resigned from the **Virginia Independent Automobile Dealers Association** and is semi-retired. She can be reached at 2405 Mediterranean Avenue, Virginia Beach, VA 23451; (804) 337-4601; and leighmd@aol.com.

**The Holiday Inn at Valley View** has recently completed a multi-million dollar renovation with

a new lobby, rooms, meeting spaces, pool and fitness center, and restaurant. A patio with fire pits is also expected to be constructed outside this spring.

The historic **Hotel Roanoke & Conference Center** was recently awarded the prestigious Connie Award by the Curio Collection by Hilton brand as part of its 2018 Brand Awards program. The Connie Award is the highest hotel award for all brands across Hilton and marks the "best of the best" for each brand within Hilton Worldwide.

## WELCOME NEW MEMBERS

### EXECUTIVES

**Erika Almstead**

Richmond Association  
of REALTORS  
Richmond

**Shellie Archer**

VA Nursery & Landscape  
Association  
Richmond

**Sandra Harrington**

VA Municipal League  
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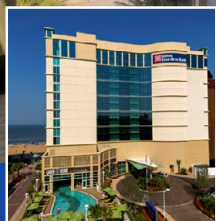
**Carrie McIntyre**

The Wyman Company  
Ashburn

## SURVEY PRIZE WINNER

Congratulations to **Phyllis Errico, JD, CAE**, General Counsel with **Virginia Association of Counties**, who was the March Seminar Series evaluation prize winner. Phyllis received a Norfolk Lunch Cruise for two on the **Spirit of Norfolk**.

Be sure to submit the evaluations that are emailed after every event you attend. Your feedback is valuable to making VSAE events successful.



## WHERE BUSINESS AND PLEASURE MEET

- 167 all oceanfront rooms, including 24 suite with balconies
- Over 5,000 square feet of oceanfront meeting space
- Oceanfront Executive Boardroom with video conferencing
- Two oceanfront restaurants and nightly entertainment
- Upscale outdoor/indoor heated pool
- 3rd floor sun deck, business center & fitness center



**Hilton  
Garden Inn®**  
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