

OSAE 2019 Annual Conference Educational Program



Wednesday, June 19, 2019



2:30-4:15 P.M. – OPENING KEYNOTE ADDRESS

Zebras & Ostriches – 5 Simple Rules to Engage and Retain Your Best People

Dr. Philip Kim, D.Sc., CISSP, CISA, Associate Professor, The DeVille School of Business, Walsh University

The key difference between a successful business and one that doesn't reach its full potential is the level of engaged employees. That is, how well your company performs is directly linked to the level of enthusiasm, excitement and energy your employees feel when they go to work. Research continues to point out that employees who are significantly engaged outperform work groups that are not engaged. This presentation introduces Kim's 5 Simple Rules to increase your employee engagement that can improve your business relationships, retain your best people and create a culture of continuous improvement.

His keynote address is reason alone to attend the OSAE 2019 Annual Conference. You don't want to miss this year's annual conference opening keynote address!



4:30-5:30 P.M. – Concurrent Educational Session

Strategies for Building Association Executives Careers

Michele Warholic, Esq., CAE, Vetted Solutions

There are many paths to the top of the mountain, but the view is always the same. (Chinese proverb)

Many association executives and professionals find their way to this nonprofit business sector through serendipitous paths, but, after they arrived, they find challenge and satisfaction in the work and its community. Whether you've been in associations for two or 20 years, you know the value our members place on professional development. In this session, we will:

- Explore different models for career planning and skills assessment
- Identify strategies for building skills and experience through current roles, lateral moves and cross-functional assignments
- Demonstrate the value of professional development and academic studies
- Seek volunteer activities that fill skills gaps
- Build relationships for mentoring and networking
- Demystify the executive recruitment processes



4:30-5:30 P.M. – Concurrent Educational Session

Panel Discussion: How Hoteliers and Planners Can Work Better Together

Moderator Pat King, National Sales Manager, Dublin Convention & Visitors Bureau

The key to success for more than one individual is always compromise. Too often, association meeting professionals and hospitality providers butt heads over the particulars of their event's special needs. This session will offer insights and solutions designed to overcome obstacles to success by providing knowledge on realistic expectations and compromise ultimately leading to the greatest outcome for all interested parties.



4:30-5:30 P.M. – Concurrent Educational Session

How Do You View Failure?: A Workshop on How to Re-think Failure

Dr. Philip Kim, D.Sc., CISSP, CISA, Associate Professor, The DeVille School of Business, Walsh University

Some of the world's most dynamic innovators of the past two decades experienced routine failure. Unfortunately, because traditional corporate settings often penalize failure and discourage risk, many of those innovators had to leave their place of employment to achieve their goals. From a young age, students quickly discover that "knowing the right answer is far more important than asking a thoughtful question." What if we fundamentally changed the way we looked at failure?

In this program, participants will learn how to:

- Re-think how to view failure
- Seek specific insights and wisdom in the midst of failures
- Recognize constraints can actually improve creativity

Thursday, June 20, 2019



8:30-9:45 A.M. – General Session

Rip Off the Rearview Mirror

Chad J. Willett, Speaker, Acting Instructor, Author

No past...No future...All is now. Rip Off the Rearview Mirror by experiencing the power of "Now." We have this moment to discover our "Through Line" in life that channels our energies and keeps us in the present moment. Are you ready to transform your life or organization by knowing what you want both short-term and long-term and creating a "Through Line?"

Rip Off the Rearview Mirror is a one of a kind experience which includes:

"Through Line:" Discover your "Through Line" in life, which gives you energy, purpose and direction; The "Power of Now"- Live for the only minute you can control, which is "now;" Entertainment - Storytelling, audience interaction and watching short clips from TV shows/ films that reinforce the vision and message of "Rip Off the Rearview Mirror;" Value - By focusing on your "Through Line," experience firsthand what it is like to "Rip Off the Rearview Mirror."

Upon completion of this session, participants will gain:

- Mindset - Create an Orville Wright "mindset" where you don't need a pilot's license to try something new, exciting and bold
- Energy- Generate energy by channeling your focus and being completely absorbed in the present moment
- Communication- Improve communication by being present and focusing on the 93 percent of communication (non-verbal)
- Purpose- Create a "Through Line" in your life where you define your short-term objectives (3 objectives/1-3 years) and your super objective (1 super objective/3+ years)



10:00-11:30 A.M. – Concurrent Educational Session

Marvelous Meetings: How to Make Your Events Productive and Enjoyable

Edward Leigh, MA, President, Edward Leigh Enterprises, Inc.

Energize your meetings with fun and practical techniques! The session provides easy-to-implement tools to enhance every aspect of the meeting process. You will learn strategies to enhance pre-meeting announcements, openings, icebreakers, agenda planning, audiovisual tools and closings. This program provides all the tips you need to have spectacular meetings. For meetings, content is king; however, the delivery of the meeting is also vital to create a sense of excitement among participants. No one learns when they're sleeping! Come prepared for a content-rich and invigorating session.

Program objectives:

- Review techniques to open meetings with energy and enthusiasm
- Analyze educational tools, exercises and games that add impact to your content
- Discuss techniques to close meetings to ensure learning takes place



10:30-11:30 A.M. – Concurrent Educational Session

Still Stuck? Three Coaching Tips to Transform Your Status Quo

Wendy McWherter, ACC, Executive Coach, McWherter Coaching Group

Imagine how you would feel if...

- You were free to dream big and do new things, making time to envision and design that strategic picture of where you want to go
- You knew exactly what would make the most difference now and next to paint that picture in vivid colors, and you had the energy, willpower and fortitude to stop doing what's always been done and taking it to the next level, and
- You could notice and enjoy the progress you've made without being robbed by the pressure of what's left undone

As a participant in this workshop, you will learn:

- Your deep desire to escape the status quo and get to "better" is achievable
- A quick technique to identify and stop your automatic negative thoughts
- The Red Path/Blue Path Exercise to help you chose *and* do what's most important
- The Crossing the River Exercise so you can use *both* your brain's hemispheres to get unstuck
- What to do about the persistent "I Don't Know" realm
- The benefits of celebration and creative ways to take note of the 'better' you've already achieved



10:30-11:30 A.M.

Bring Value to Your Members Through a Group 401(k) Plan

Peggy N. Slaughter, CFP®, CRPS®, AIF®, CPFA, Retirement Plans Consultant, Saling Simms Associates, Inc.

Offering a 401(k) plan can be expensive and time-consuming for all employers – large or small. Yet, it is a benefit most employees expect today. Your association may be able to bring a valuable solution to your members, helping to lower the costs, reduce the effort and shift fiduciary liability of providing this crucial retirement benefit. Come to this session to learn more about aggregation arrangements and Multiple Employer Plans (MEPs).



1:00-2:00 P.M. – Concurrent Educational Session

Engaging Your Employees: Surefire Strategies to Motivate, Communicate & Reward

Edward Leigh, MA, President, Edward Leigh Enterprises, Inc.

The knowledge economy is built on the creative transfer and connection of ideas. To be successful in this economy, associations should embrace their staff and volunteer diversity as creative problem-solvers. This session will introduce attendees to strategies centered on idea cultivation, creative development and becoming a creativity broker as an ideal way to solve problems and engage members. Why not harness the power of collaboration and learn how to guide the creative process for better success throughout the organization? This session is built upon real-life experiences in the arts, true stories and the transfer of ideas from thought leaders.

Upon completion of this session, participants will learn:

- Innovative strategies from the leading creativity industry, arts and entertainment
- The crucial steps in the creative process
- The philosophy of leading a team through the creative process



1:00-2:00 P.M. – Concurrent Educational Session

Mobile Video Strategy for Associations

Dan Farkas, Lecturer of Strategic Communication, The Ohio State University

The audience engagement numbers tell the story. Video is a critical component of an overall communication strategy. Associations face specific challenges in terms of resources and budgets. That simply cannot be an excuse anymore in this modern communication climate.

Mobile Video Strategy for Associations will help busy professionals:

- Develop an easy-to-implement video strategy
- Learn about affordable tools to help with video content creation, and
- Offer ideas to make the most your video opportunities.

Attendees will also leave with a checklist for creating a custom video strategy that connects to larger communication and business goals.



1:00-2:00 P.M. – Concurrent Educational Session

Peer Exchange: PR, Government Affairs, Membership and More!

You, Your Colleagues and Industry Leaders

Often, when we attend conferences, we learn as much from the professionals presenters as we do our peers. But the peer learning comes from unallotted time when we want to be exploring the city, the facility or the community hosting the conference. This session will allow conference attendees to float from table to table for a set amount of time and gain valuable insights from our association peers. There will be a host of topics that are discussed, including human resource challenges, communications techniques, government affairs and much more. Participants will engage, connect and learn through this structured but interactive peer-learning opportunity.



2:30-4:00 P.M. – General Session
Uncovering the Valuable Leader in You
 Velma Knowles, Founder & CEO, Leaders Pathway

We have all read plenty of leadership books and taken enough courses on the topic to write our own book on the topic. Yet, as a leader, we are faced with more challenges than anyone should have to bear. Leading in today's environment is hard work. After all, being a leader is about leading people, influencing followers, achieving results and so much more. Leaders who value others gain greater growth, value and influence themselves.

Upon completion of this session participants will:

- Find inspiration and energy to be the leader everyone wants to follow versus has to follow
- Gain leadership knowledge whether they are a seasoned leader or an emerging one
- Learn the 7 easy steps to become The Valuable Leader, and
- Gather practical steps for enhancing and improving their leadership skills in a fun, energetic and easy-to-apply format



4:00-5:00 P.M. – Concurrent Educational Session
Run Improve Grow (RIG) | A Model For Continuous Improvement
 Michael Borowitz, CPA, CAE, Shareholder, Clark Schaefer Hackett CPAs & Advisors

During this session, Michael Borowitz and other CSH representatives will share a valuable methodology on operating most efficiently: Run Improve Grow is a roadmap from daily firefighting to bold business growth. The Run Improve Grow™ (RIG) methodology is a model for continuous improvement that stimulates a culture of consistent growth and innovation. Organizations who master the Run, can begin to Improve and through bold leadership watch themselves Grow.

Participants will:

- Learn about empowering employees to take true ownership of essential day-to-day operations
- Understand what it takes to transform the mindset of the organization to focus on improvements
- Uncover the key ingredients your organization needs to grow and to continuously capitalize on new opportunities



4:00-5:00 P.M. – Concurrent Educational Session
Social Media Best Practices
 Barb Burgie, Owner, CEO, Burgie MediaFusion

Face it: every day, it seems like a new social media platform comes into existence. We are challenged to have a presence on each platform and address the one “follow,” “like” or “friend” we can garner on that platform. But, if you don't implement smart, targeted social media practices, your organization will not see the true benefits of social media engagement and long-term community building. This session is designed to help you get your ducks in a row and approach social media from the smartest position possible.

Upon completion of this session, participants will walk away possessing:

- How to implement social media best practices that protect, strengthen and drive your brand's success
- How to implement targeted strategies that align with your short- and long-term objectives
- How to effectively communicate on the platforms your organization utilizes in order to build trust, connections and community engagement



4:00-5:00 P.M. – Concurrent Educational Session

When Remote Work Works

Tracy Vanneman, CAE, Corporate Sponsorship & Exhibits Consulting

Pajama day every day. No boss looking over your shoulder. There's boundless freedom in working from home, right? As it turns out, creature comforts and zero-minute commutes define remote work about as well as ping-pong tables and free lunches define organizational culture. In this session, part exploration into remote work research/part day-in-the-life of a remote worker, we will consider remote work in associations from all angles. What is the relationship between a remote workforce and organizational concerns like culture, productivity and talent management? Is working from home a fad or the future?

By participating in this session, attendees will:

- Compare the benefits and drawbacks of remote work from both the employer and employee perspectives
- Explore the relationships between remote work and organizational culture, employee productivity, and talent recruitment and retention
- Describe the day to day experience of a remote worker

Friday, June 21, 2019



8:30-9:30 A.M. – Concurrent Education Session

Powered Productivity

Beth Ziesenis, Speaker, Your Nerdy Best Friend

Exasperated by email? Peeved about passwords? Tired of tedious tasks? You're not alone.

Join Your Nerdy Best Friend, a.k.a. author Beth Ziesenis, for a research-based look of common productivity problems, followed by the technology to solve them. Discover how to use free and bargain-technology tools you never knew existed to work more efficiently with your teams, to get more organized and to finally get stuff done.

Takeaways from this session:

- Discover low-cost, high-value apps and tech tools that you can start using right away
- Learn great tech tips and app ideas from your colleagues
- Get new ideas to increase efficiency, improve relationships and complete tasks



8:30-9:30 A.M. – Concurrent Education Session

Kick Your Procrastination into Productivity

Velma Knowles, Founder & CEO, Leaders Pathway

We all have good intentions to get the job done; yet, the road to Hell is paved with good intentions. Most of our regrets are not a result of something we did, but a result of something we did not do. We *want* to get things done and *be* more productive, Yet, we need a better understanding of how to do so consistently. This simple but powerful program, Knowles' *My SPUD™ Method* will give participants the tools they need to identify their procrastination style and leverage their superpowers.

Upon completion of this session, participants will walk away possessing:

- Renewed energy and inspiration for overcoming productivity challenges, and
- Knowles' "Focus 5" approach to moving from "thoughts" to actions"



8:30-9:30 A.M. - Concurrent Education Session

Standing Still Gets You Nowhere: Only You Can Plot Your Path

Tom Balzer, CAE, President & CEO, Ohio Trucking Association

Sadly, we live in a world where we often have to look out for our best intentions. It's somewhat pessimistic to admit but it's the reality of today's business environment. If you fail to focus on career development and establish guidelines for where you want to be in 2, 5 or 10 years, others will make those decisions for you. Don't let them.

Upon completion of this session, participants will walk away:

- Knowing how to smartly approach career development initiatives
- Understanding what those in the c-suite are looking for in job candidates
- Possessing a better attitude about how they can conduct future planning and how their behaviors will elevate their colleagues' paths to success, too



10:30 A.M.-12:00 P.M. – The 2019 Closing Keynote Session

A Day in the Life of a Nerdy Professional

Beth Ziesenis, Speaker, Your Nerdy Best Friend

So many apps... so little time. How can you put the technology at your fingertips together to make your life easier at work and home? This fast-moving, laughter-filled session takes you hour by hour through the day in the life of a tech-savvy professional. You'll learn how a professional nerd solves a security crisis before 10 a.m., learns to make more of a lunch hour with a set of virtual hands, saves money on software before the staff meeting and brings the team together online before the day is done.

In this session, Ziesenis will:

- Help you understand how technology fits into every part of your day
- Learn about technology systems that streamline projects and tasks
- Develop a vision for how the technology in your toolbox can work together to best meet your needs