



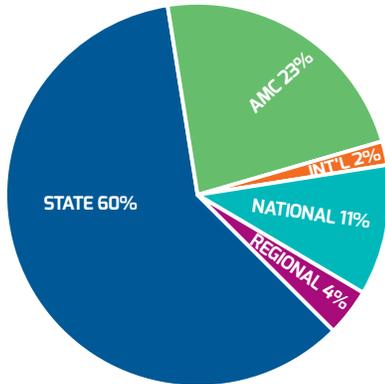
VIRGINIA SOCIETY of ASSOCIATION EXECUTIVES

YOUR *association* PRESS

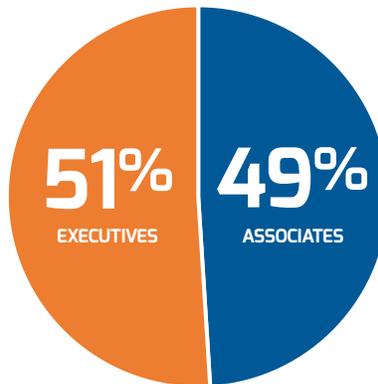
APRIL 2018

CONFERENCE BY THE NUMBERS

ASSOCIATION TYPE



ATTENDEE BREAKDOWN



ATTENDEES ARE FROM...



INSIGHTS FROM LEADING ASSOCIATION CEOS



Bob Ramsey, CAE



Dale Bennett



Stephanie Peters, CAE

Recently the Association Press interviewed three association CEOs to learn about their career paths and their insights on issues facing the industry. The three CEOs interviewed were Bob Ramsey, CAE of the Virginia College of Emergency Physicians; Dale Bennett of the Virginia Trucking Association; and Stephanie Peters, CAE of the Virginia Society of CPAs.

AS AN ASSOCIATION CEO, I'M AT MY BEST WHEN . . .

Bob: I am teaching and sharing in one-on-one meetings with individuals who have expressed an interest in bettering themselves in their career. I love helping others figure out what it is they want in life and then working with them to make it happen.

continued on page 6 >

NEXT EVENT

IDEAS THAT WORK

Advocacy | Communications | Leadership | Meetings

ANNUAL CONFERENCE

MAY 6-8, 2018  
HILTON NORFOLK THE MAIN

Sunday, May 6

- ▶ Association Leadership Virginia
- ▶ Pre-Conference Activities  
Nauticus & the Battleship Wisconsin  
Norfolk Brewery Tour  
Norfolk Tides Baseball Game
- ▶ Opening Reception
- ▶ Dine Around Town (on your own)

Monday, May 7

- ▶ Early Morning Activities  
Yoga Wake Up  
5K Fun Run
- ▶ Breakfast & Opening Keynote
- ▶ Morning Breakout Sessions
- ▶ Lunch and Board Installation
- ▶ Afternoon Breakout Sessions
- ▶ IGNITE Sessions
- ▶ Shared Interest Group (SIG) meetings
- ▶ Emerging Association Professionals (EAP) Reception (invitation only)
- ▶ President's Reception (invitation only)
- ▶ Reception & Dinner

Tuesday, May 8

- ▶ Breakfast and Shared Interest Group (SIG) meetings
- ▶ Closing Session Keynote
- ▶ Golf at Riverfront Golf Club

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

VOTED ONE OF CENTRAL VIRGINIA'S BEST HOTELS AND  
SPECIAL EVENT VENUES FOR THE PAST 7 YEARS!

# Consistently EXCELLENT

Step into history and stay in style. Weathered timber beams. Rich, earthy granite.  
Book your next meeting or retreat at The Craddock Terry Hotel.

- Featuring freshly renovated event space.
- Multiple new restaurants and bars added to the Downtown Lynchburg scene.
- Meet our newest hotel mascot, Miss Penny Loafer.

 *Craddock Terry*  
HOTEL  
AND EVENT CENTER



OVERLOOKING THE JAMES RIVER, DOWNTOWN LYNCHBURG, VIRGINIA | [WWW.CRADDOCKTERRYHOTEL.COM](http://WWW.CRADDOCKTERRYHOTEL.COM) | 434.455.1500

## THANK YOU TO OUR ANNUAL CONFERENCE SPONSORS

### EVENT HOSTS

Hilton Norfolk The Main  
Sheraton Norfolk Waterside Hotel  
VisitNorfolk

### AUDIO VISUAL SPONSOR

James River Audio Visual Services

### SPEAKER SPONSOR

Powell Kohne Associates, LLC

### MOBILE APP SPONSOR

Engagefully by Results Direct

### DIAMOND SPONSORS

Colonial Williamsburg Hotels  
Kingsmill Resort  
Lynchburg Regional CVB  
Naylor Association Solutions  
Norfolk Waterside Marriott  
The Omni Homestead Resort  
Richmond Region Tourism  
Virginia Beach CVB

### PLATINUM SPONSORS

Embassy Suites Hampton Roads  
Greater Richmond Convention Center  
The Greenbrier  
Hampton CVB  
Hilton Richmond Hotel & Spa at Short Pump  
The Hotel Roanoke & Conference Center  
Jepson Alumni Center  
Omni Charlottesville Hotel  
Renaissance Portsmouth-Norfolk  
Waterfront Hotel  
Sheraton Virginia Beach Oceanfront Hotel  
The Tides Inn  
Virginia Beach Resort Hotel & Conference Center  
Visit Virginia's Blue Ridge

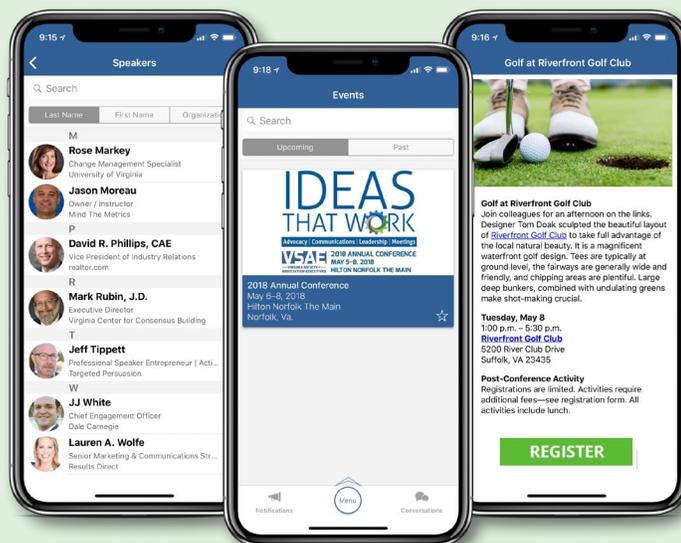
### GOLD SPONSORS

Asset Protection Group, Inc.  
Craddock Terry Hotel  
DoubleTree by Hilton Williamsburg  
Hilton Richmond Downtown  
Hilton Washington Dulles Airport  
MemberClicks  
Visit Williamsburg  
Wyndham Virginia Beach Oceanfront

### SILVER SPONSORS

Chesapeake CVB  
DoubleTree by Hilton Virginia Beach  
Fredericksburg Regional Tourism Partnership  
The Founders Inn & Spa  
Hilton Virginia Beach Oceanfront  
Newport News Marriott at City Center  
Newport News Tourism Development Office  
Omni Richmond Hotel  
Richmond Marriott Short Pump  
Visit Fairfax

## AT ANNUAL CONFERENCE, ENGAGE FULLY WITH "ENGAGEFULLY"



Enhance your conference experience and stay connected at this year's Annual Conference with the official conference mobile app, **Engagefully**. Download the **Engagefully** app from VSAE's mobile app partner, **Results Direct**.

With this app at your fingertips, you will be able to:

- ▶ Navigate the conference
- ▶ Connect with other attendees
- ▶ Engage on social media
- ▶ Create your own personal conference schedule
- ▶ Learn about activities, events, meet-up times and places
- ▶ Read about your keynote presenters and speakers

To download the app to your phone or tablet:

1. Download and install **Engagefully** from your phone's app store.
2. Open the **Engagefully** app and search for VSAE.
3. Tap "VSAE - Annual Conference."

For more information about the conference, and to register, visit [vsae.org/annual](http://vsae.org/annual).

## DONATE RAFFLE PRIZES FOR ANNUAL CONFERENCE



During the VSAE Annual Conference, VSAE holds a raffle for attendees as part of the fun and excitement of the event. Donating a raffle prize is not only a great way to participate in the fun of Annual Conference, but it is an opportunity to market your organization to the association industry in attendance. Suggested donations include day trip packages, event tickets, gift baskets, overnight stays with meals, etc. Donations should have a minimum retail value of \$25. To donate, write Jessica at [jessica@vsae.org](mailto:jessica@vsae.org) or call (804) 249-2244.



Scot McRoberts, MPA, IOM  
President, VSAE

## If Your Association is Not Growing Now...

The U.S. economy has experienced a sustained growth phase. Your members are enjoying growth opportunities like they haven't seen since "W" was president. Is your association growing too?

I am the chief executive of a small state association. I don't make a blip on ASAE's radar. My colleagues are all of you—professionals in mostly small staff associations. It is a good place to be. In many ways, there is more opportunity for growth in a small organization. But what I see most peers doing is small ball: "our conference made 15 percent more;" "PAC contributions are up;" "retention is good and we grew membership by 2 percent." However, I don't hear much about BHAGs (Big Hairy Audacious Goals).

At Virginia Council of CEOs, we have been focused on growth ever since the recession. Our BHAG has been at least 10 percent growth annually. Why? Our mission is to connect small business CEOs for learning and growth. The mission is not to serve 5 percent or 50 percent of these CEOs, but as many as we can. So, it seems to me that membership growth should be a primary objective, and one to which the organization should commit itself for the long-run.

We have achieved an average 11 percent annual membership growth every year since the recession. You may ask, "How have you done this, and how can I replicate it?" I would suggest that it is like anything else you want to accomplish. You must start with the "why," build and iterate the process to get there, and put in a sustained effort. Based on my experience, here are five key thoughts I have about how to grow your membership:

**1. Be sure about whom you serve and what value you offer.** Ruthlessly pursue your "why." If you and your team have not watched Simon Sinek's TED Talk at least ten times, start today. We constantly go back to our "why" in strategy, in marketing, in everything.

**2. Leverage your fan base.** The members that love you (and most do) are your most valuable asset. Give them the tools and encouragement to spread the love—and the value. We have run a member referral campaign every year for the last six years. It has filled our pipeline with warm leads. The keys are: make it easy; remind them often; set a specific timeframe; and incent them with competition, recognition, and rewards.

**3. Leverage technology.** There are so many affordable, sophisticated tools available now that effective CRM and marketing automation is within your reach. Online marketing is not rocket science any more. I have learned a lot from reading small business blogs and books. Emulate what successful small businesses do.

**4. Invest in growth.** Now is the time to crack open that reserve fund and invest in growth. Reserve funds are not just for bad times. Reserves also exist so that your association can take advantage of an opportunity. Spend some money from reserves on market research, a new website, content strategy, or a part-time marketing manager. These growth-oriented projects do not get done when times are hard.

**5. You say your association may not have potential to grow in membership?** Maybe you have 90 percent market penetration. Maybe the industry you represent is declining. Then don't focus on membership growth. Find some other way to grow. Offer new products and services. Pivot into new markets. Merge with another association. But do something!

I am not advocating growth for growth's sake. You have to have a strong "why." But, if you are not leading your association to grow now, I believe you are missing a rare opportunity. In the wise words of others, "If you want something you've never had, you've got to do something you've never done." Get to it.

## LESSONS FROM THE

# SIG

### EXECUTIVE TRANSITION 2 GREAT TIPS

Transitioning to new leadership is always a challenge, and the hardest part is often making sure the small details of day-to-day operations that come naturally to a long-tenured CEO, and in fact are often not even recognized as discrete tasks, get transmitted properly. During the Small Staff CEO SIG, several great ideas emerged on how to make a smooth transition.

1

Share the previous year's Outlook calendar with an incoming leader—just knowing your work flow can help fill in the blanks; if you track your time, reviewing a year's worth of those tracking pages can help bring a new person up to speed on all the elements of your job.

2

If there is overlap with the new leader, set aside time throughout the transition process by category, to allow both the new and outgoing leader to focus on the job piece-by-piece. It's a great way to better ensure details are not overlooked.

...

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 [vsaе.org/shared-interest-groups](http://vsaе.org/shared-interest-groups).

# Meet Your Incoming VSAE President

Ray Mattes, CAE, President & CEO, Retail Alliance

## What is your leadership style?

Probably more consensus and visionary knowing that I hold the veto card which is seldom used. If a leader wants his/her team to take ownership then it is imperative that everyone has a voice. Therefore, we hire people who are trustworthy and have strong opinions. Passionate dialog is encouraged and not to be taken personally. As a result, we have an amazing team that shares a common vision. That did not happen overnight.

## What goals do you have during your presidency of VSAE?

To continue following through on the strategic plans that the board and staff have developed. Strategic planning works only when you execute the goals of the plan through a well thought out business plan. The board feels very confident that Brandon and the team at Eisenman & Associates are up to the challenge.

## What are you working on that is new and different?

Our organization took on strategic planning three years ago, and we are now seeing the returns. We have a state of the art "Buy Local" program with a very sophisticated app that tracks local shopping.

We also launched a "Center for Retail Excellence" retail school in January 2017 with four students and now have 25 students. This year we launched a monthly "Strive Workshop" that accommodates live streaming. It is really cool and appears to be a huge winner with our members due to the geographical challenges of Hampton Roads.

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

One recent success story is that we started our own Peer Exchange Group (Retail Think Tank) modeled after the Master Mind workshop that Jim Roman and Scot McRoberts showed us during the last two CEO & Senior Staff Retreats.

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

I am fortunate to be the seventh President/CEO of this proud organization since 1903. I must say that all of my predecessors have taught me valuable lessons. Mr. Peck, who hired me in 1984, taught me a lot about business, integrity, and how one treats those around you.

## What do you enjoy doing in your spare time?

First and foremost, spending time with family. Also, golf, boating, reading, and music.

## What's on your music playlist?

For easy listening, jazz; for boating and golf, country; for exercising, rock & roll; and for reading, classical and new age.

## What sports/teams do you root for?

UVA basketball, Redskins, and any baseball team my youngest is playing for.

## What drew you to the association industry?

I sold the Retail Merchants Association a copier in 1983. They needed a Manager Trainee and I applied. The rest is history.

## What's your favorite movie genre?

My favorite movie is Hoosiers. My favorite genre is history.

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

Get rid of hate and jealousy—the root of all problems.



## What are three things you want to do before you die?

Travel the world with my wife, shoot my age in golf, watch my grandchildren succeed.

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

Can't play or work scared. Got to be able to take some risk.

## What are your favorite apps to use?

LOVEVA (our buy local app), Pandora, GHIN, and Shazam.

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

Be patient, listen, never assume, surround yourself with the best people, stay ahead of the curve, don't make emotional decisions, and engage with VSAE with its plethora of best practices.



Our accommodations have vastly improved since 1862.

NOW WITH A 110,000 SQ. FT. CONFERENCE CENTER  
(not pictured above)

Fredericksburg  
TIMELESS.  
SPOTSYLVANIA STAFFORD

Fredericksburg, just an hour south of D.C., offers personalized meeting planner assistance to make your job easy.

[www.MeetAtFred.com](http://www.MeetAtFred.com)  
1-800-260-3646

**Dale:** I am talking with members about the challenges they face in operating a trucking company or industry vendor and their ideas about how the association can help them survive and be profitable.

**Stephanie:** I am focused on the big picture and the future. We have great people who can implement programs and ideas far better than I can, so I feel more comfortable when I can focus on bringing ideas together and envisioning where we're going as an organization.

**HOW HAS THIS JOB CHANGED DURING YOUR TENURE AS AN ASSOCIATION CEO?**

**Bob:** The job hasn't really changed much in the 45 years I've been engaged in association management. There are new, faster ways of getting things done (technology and so on) but the fundamental job of "making a difference in an industry" remains the same. There is, however, a much stronger need to continuously "sell" the value of the association because competition, loyalty, and the limited attention span of individuals require keeping the organization very visible to members.

**Dale:** Looking back over my 28 years as a CEO, the biggest change I have seen is the rapid advancement of technology. It is amazing to think how a word processor was a cutting-edge

**"I believe a smart and effective leader is one who seeks out those with expertise and/or experience in whatever issue they are working on and considers their counsel when making decisions."**

*Dale Bennett*

innovation compared to what we can do on our cell phones today. Or, how we marveled over the dot matrix printer (with the connected sheets of perforated paper with little holes on each side) compared to being able to send a document to print without being connected with a cord. I believe that choosing to embrace rather than fight these advancements has helped me last this long in this profession.

**Stephanie:** I have been CEO for ten years. The job has definitely moved away from knowing a lot of details to knowing more generally about our major priorities and keeping everyone focused on achieving top goals. Also, technology is impacting everything we do and forcing us to be much more nimble and adaptive to change.

**WHAT IS THE SINGLE BIGGEST CHALLENGE YOU FACE AS AN ASSOCIATION CEO?**

**Bob:** Trying to get five to six hours of sleep each night. My mind immediately kicks in whenever I wake up so I'm usually reading at three or four

a.m. I keep note pads everywhere I sit down to capture my thoughts, believing "a short pencil is better than a long memory."

**Dale:** A recent wave of mergers and acquisitions in trucking has resulted in the sale of several of our long-time leaders and biggest financial supporters to out-of-state companies. We are faced with the challenge of convincing these non-Virginia owners of the value of continuing to support and be involved in the association.

**Stephanie:** Maintaining relevance among new generations, and finding new ways to add value.

**HOW DID YOU BECOME AN ASSOCIATION CEO?**

**Bob:** After leaving the Navy as a pilot and getting bored selling insurance I learned you could get paid for helping businesses organize themselves. Since leadership was something I always enjoyed, my first job was with the national office of the Associated Builders & Contractors in 1971. Using my association "BS," I got my first CEO job in association management in 1973 opening a chapter of ABC in Orlando, Florida.

**Dale:** By accident (or luck). After graduating from the University of Richmond, my plans to attend law school did not work out financially. In need of a job, the father of a very close friend helped me get a position with the Virginia State Crime Commission. The Commission's budget appropriation was discontinued, and I was again in need of employment. Through contacts made from my work with legislators at the Crime Commission and the General Assembly, I interviewed in 1984 for a position at what was then called the Virginia Highway Users Association

**"Make people the priority—members, customers, staff, and other partners."**

*Stephanie Peters*

**Three Indulgences...One Convenient Location**

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

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

Relax in Shula's Lounge or enjoy the our extensive wine list while dining on selections that offers more than just great steak!



**Hilton Richmond  
Hotel & Spa  
Relax, Indulge, Enjoy**

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



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



and was fortunate enough to be hired. Five years later I was promoted to the chief executive position and have worked for the association ever since.

**Stephanie:** I was an internal candidate for the job. I had worked for the VSCPA for ten years prior to becoming CEO. I understood the profession and its issues, and I knew our members well.

#### WHAT PIECE OF ADVICE WOULD YOU GIVE TO AN ASPIRING ASSOCIATION CEO?

**Bob:** Never stop learning. When you stop learning you stop living, so develop a good learning habit. Know your strengths and design your job around using your strengths as much as possible. Hire others to fill in your weaknesses. We are too often defined only by our job, so it is critical to find fun things we enjoy outside of association management. All work and no play is a real killer.

**Dale:** Never be too proud or reluctant to ask your peers or anyone else for guidance and advice. I believe a smart and effective leader is one who seeks out those with expertise and/or experience in whatever issue they are working on and considers their counsel when making decisions.

**Stephanie:** Make people the priority—members, customers, staff, and other partners. Take the time to build those relationships and establish trust. And really listen to people.

#### WHAT DO YOU THINK ARE THE BIGGEST CHALLENGES YOU SEE FACING THE BROADER ASSOCIATION INDUSTRY?

**Bob:** Today's typical association business model is outdated. Associations have more competition, so we need to work harder to justify our existence. Thriving associations will become more like sales organizations. They will create valuable and meaningful services members desire. Find ways to charge for your services to keep the lights on. We must get the heck out from behind our desks and mingle with our members to find out what is keeping them up at night.

**“I keep note pads everywhere I sit down to capture my thoughts, believing ‘a short pencil is better than a long memory.’”**

*Bob Ramsey*

**Dale:** Being able to identify and adapt quickly to the increasing pace of change and technological advances that will impact associations and their members.

**Stephanie:** Meeting changing member needs and evolving membership models. Investing in technology and leading the way for members in the area of innovation.

#### KNOWING THAT THIS WILL GO TO PRINT AFTER THE GAMES ARE DECIDED, WHO'S YOUR PICK TO WIN THE NCAA MARCH MADNESS TOURNAMENT; VILLANOVA, KANSAS, MICHIGAN, OR LOYOLA-CHICAGO?

**Bob:** I don't care. I don't watch basketball.

**Dale:** Villanova, whose victory helped me win my pool.

**Stephanie:** I pick Villanova.

#### IF I WAS NOT AN ASSOCIATION CEO, I WOULD BE . . .

**Bob:** Retired. I have gotten immense pleasure finding ways to make a difference in emergency medicine while working with amazing physicians, so I don't ever plan to stop sharing the skills I've learned or stop having fun doing more of the things I enjoy. Even when I leave this job, I'll still be teaching and sharing in one-on-one meetings with individuals interested in bettering themselves in their career.

**Dale:** An attorney or working in something sports-related.

**Stephanie:** Journalist, writer, or movie critic.

## PRIZE WINNER

Congratulations to **Walt Lyons**, of the VA Bankers Association, who is the March evaluation prize winner. Walt won two VIP tickets to a show of his choice at The National, compliments of the Hilton Richmond Downtown.

Be sure to send in your feedback on VSAE events by completing the evaluation survey. Your comments are important for planning future successful events.



## 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



757-305-9001 | hiltongardeninnvirginiabeach.com  
3315 Atlantic Avenue, Virginia Beach, VA 23451

# MARK YOUR CALENDARS

REGISTRATION FOR THESE EVENTS OPENS IN MAY.



## AMC RETREAT

July 10 | The Graduate Hotel

VSAE's fifth annual AMC Retreat is Virginia's only conference geared specifically towards association executives who own or work for association management companies. Hosted by The Graduate Hotel in downtown Richmond, this intimate event provides a great opportunity to learn and network alongside AMC colleagues. Topics typically include marketing your AMC, technology for your AMC, and case studies from fellow AMC executives. There will also be roundtable discussions with colleagues in similar roles. Large or small; seasoned or brand-new; regardless of your AMC, this is bound to be an event for you.

## MEETING PLANNER SUMMIT

August 16-17 | Colonial Williamsburg Lodge

Join fellow meeting planners for VSAE's fourth annual Meeting Planner Summit. Hosted by the Colonial Williamsburg Lodge, this two-day conference includes content on nearly every aspect of planning an association event, equipping you and your team with the tools you need to plan meetings and improve your productivity. The conference includes presentations, roundtable discussions, and time to network with fellow attendees.



## CEO & SENIOR STAFF RETREAT

September 16-18 | The Cavalier Virginia Beach

This exclusive two-day event for association CEOs and other senior staff leaders is focused on equipping you to lead your association now and into the future. This year's retreat at the newly restored The Cavalier Virginia Beach will offer insight and resources for association leadership to better themselves and in turn, their organizations. The retreat also includes attendee-led roundtable conversations among colleagues. This event is packed with great educational content and plenty of networking opportunities for you to meet and mingle with fellow association CEOs.

## FALL CONFERENCE

October 4 | Greater Richmond Convention Ctr.

Hosted at the Greater Richmond Convention Center in partnership with *Virginia Business Magazine*, the Fall Conference (formerly the Educational Symposium & Expo) is one of Virginia's premier conferences for association executives and other non-profit leaders. The event includes a keynote presentation and breakouts on a wide variety of topics. The conference includes a tradeshow with over 60 exhibitors showcasing what they have to offer the association and meeting planning industries.

## EXHIBIT AT THE 2018 FALL CONFERENCE

Thursday, October 4, 2018  
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 for on or before **Friday, May 25** will save \$100 on registration fees (early bird pricing noted below).

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

### Front Entrance Booths

Members: \$930

Non-members: \$1040

### Corner/Premium Booths

Members: \$880

Non-members: \$990

### Aisle Booths

Members: \$830

Non-members: \$940

## MARKETING OPPORTUNITIES

Want to promote your company to Virginia's association industry? Here's how:

### Print & Digital Advertising

Advertising with VSAE is a great way to reach potential clients and customers, as well as existing clients and customers.

Have a new service? Expanded offering? New space? Upgrades? Renovations? Anything newsworthy? Just want to increase your exposure? Let Virginia's association industry—your customers—know.

Purchase a full color ad in the VSAE *Association Press* newsletter or on VSAE's website. Ads start at \$500 and discounts are offered for multiple ads.

Already finalized your Partner Program package for 2018? Don't worry, you can still purchase additional advertising.

Write Brandon at [brandon@vsae.org](mailto:brandon@vsae.org) or visit [vsae.org/partnerprogram](http://vsae.org/partnerprogram).

### Membership Directory



The Facilities Guide section of VSAE's Membership Directory has become *the* resource for association executives looking for meeting space in Virginia. Printed annually, the guide provides a two-page spread of each participating property with meeting space specifications. Executives use the guide to find the right property for their meeting. For more information, write Brandon at [brandon@vsae.org](mailto:brandon@vsae.org) or call him at (804) 249-2234.

The newly elected president walked into the executive director's office to discuss the year ahead. He brought a notepad filled with 13 projects to achieve before his term ends.

How might the executive respond?

Start by thanking him for sharing his priorities. Follow that with, "Let's look at our strategic plan to see how your projects fit." The aim is to show that his interests might already be part of the strategic plan or to discuss how they can fit.

If they don't align, the discussion might ensue, "What should we adjust in our existing plan to integrate your goals so as not to exhaust our resources?" The conversation would benefit from including the executive officers.

The approach shows the importance of a strategic plan to guide the association through successive leadership, avoiding year to year distractions.

### Strategic Planning is NOT Dead

You might have heard, "Strategic planning is dead." The statement is not meant for associations to abandon planning. Simply the processes and outcomes have evolved.

Planning retreats are opportunities for directors to consider the future. They are different from board meetings where attention is generally focused on the current year.

Planning that used to take months or weeks can be done in less than a day with proper preparation. Reports that were 20 to 100 pages have been pared down to a page or two. Rather than starting anew at every retreat, boards have realized it's smart to build upon the prior plan.

Terminology has changed. Strategic drivers might be set to frame decision making. Mission and vision statements have been combined. A plan champion or Sherpa may be appointed to monitor and report on progress. Staff track progress on a program of work.

### Association GPS

The plan sets a destination and describes a roadmap. Consider it the organization's guiding GPS—goals, priorities, and strategies.



## DO WE REALLY NEED A STRATEGIC PLAN?

The road map should be the primary guide for board, committees, and staff. When proposals are made, directors should question, "Why are we talking about this if it is not in our plan?"

### Staff Rely on a Plan

Several association executives offered perspectives on planning:

"There is an old adage, 'If you don't know where you are going any road will get you there.' The strategic plan is our road map which, when properly used, will focus and prioritize the financial and human resources to meet significant goals and objectives," explains Glenn East, CAE

and executive director at the Northeast Florida Association of REALTORS®.

At the Retail Association of Maine, CEO and CAE Curtis Picard says, "Having a strategic plan with 3 to 5 clear goals enabled us to focus our limited resources on the things that matter. While it is sometimes easy to say yes to an idea, the strategic plan gave us the criteria to determine if it was mission critical or not. Finally, the plan made our board meetings run much more smoothly once we centered the agenda on the specific goals."

Erica Huffman, CEO at the Escambia County Medical Society avows, "Having a strategic plan gives the association a sense of direction. It is a road map and without it, it is easy to get lost in the variety of tasks and projects the association manages."

Charlene Wandzilak, executive director at the Pennsylvania Veterinary Medical Association offers, "Having a strategic plan which is referred to regularly and monitored for progress helps provide a vital road map for times when the organization wants to overcommit itself and not focus on its true purpose or tries to be all things to all people. It also provides direction on where to focus resources, energy, time, and effort to make the most impact for our members and our organization's overall success."

The San Diego County Dental Society's executive Michael Koonce, CAE says, "The plan is our primary guide. It is our association's mandate on what it is we want to accomplish and our staff's marching orders on where and how to focus our

continued on page 10 >

ANOTHER EXCEPTIONAL HOTEL BY  
JOHN Q HAMMONS HOTELS, INC.

*The quality choice for  
your next event.*

Embassy Suites Hampton Roads – Hotel, Spa & Convention Center  
provides premium accommodations in Hampton, Virginia. Situated at the intersection  
of I-64 and I-664 in Hampton, and close to both the Norfolk International and the  
Newport News/Williamsburg International airports, our hotel provides easy  
access to excellent Virginia attractions.

EMBASSY  
SUITES  
by HILTON

Hampton Hotel  
Convention Center & Spa

Contact our Association Sales Manager, Erin Eissens, at (757) 213-8516 or erin.eissens@jqh.com.

1700 COLISEUM DRIVE HAMPTON VA 23666 @ EMBASSYSUITESHAMPTON.COM

> **Strategic Plan**, continued from page 9

time. If done right, it's also the measure of whether or not we are successful. I cannot imagine working without one."

### Overcoming Objections

Some boards refute the value of planning. The most common reason, "We just don't have time for a retreat."

Planning retreats got a bad rap because they began with games, trust-falls, and group hugs. Directors roll their eyes when they are told to stand up and pick a partner.

Some directors dislike having a plan because they prefer to offer suggestions at will. Without goals to frame board work, the discussions fall into the latest crisis, personal priorities, or the "good ideas" tossed on the board table.

Another objection is cost. Hosting a retreat and compensating a facilitator requires a budget. If the price seems high, remember most plans are for three years or longer—amortize the amount over three years and it's a small cost for a roadmap.

When the board says we don't need a plan, use this rationale:

- ▶ Planning retreats require an investment of time, though an effective plan can be developed with advance work in under a day.
- ▶ A plan lends support to advocacy. The description of the organization and its priorities demonstrates how the organization benefits the community and society.
- ▶ A plan should always be on the board table.

Transform the plan into a placemat format, laminate it, and keep it front and center at meetings. As ideas are offered, check how they fit in the plan or what must be adjusted to accommodate a new program.

- ▶ The plan is integral to membership recruitment and renewal. It should answer, "Why belong?" Members should know of the organization's goals and strategies.
- ▶ Incoming directors should ask, "Where is the strategic plan? Our job is to advance it." Directors offering "good ideas" or hoping to leave a legacy is counter-productive.
- ▶ Staff relies on the plan to align work with board priorities. A staff-developed business plan supports the board's strategic plan.
- ▶ The plan tracks progress and performance. Without a plan, efforts may go in any direction.
- ▶ The plan is as important as the governing documents and budget; directors should read them all to fulfill fiduciary duties.
- ▶ The planning retreat is not just about adding new ideas; it is a time to evaluate programs and drop what has low relevance.

### 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).

## THANK YOU TO OUR 2018 PARTNERS



### PRESIDENT'S CLUB

Colonial Williamsburg Hotels  
Hilton Norfolk The Main  
James River Audio Visual Services  
Kingsmill Resort  
Virginia Beach Convention & Visitors Bureau

### BENEFACTOR

Greater Richmond Convention Center  
Hilton Richmond Hotel & Spa at Short Pump  
Hotel Madison & Shenandoah Valley Conference Center  
Norfolk Waterside Marriott  
The Omni Homestead Resort  
Sheraton Norfolk Waterside Hotel

### SUPPORTER

Embassy Suites by Hilton Hampton Roads  
Hampton Convention & Visitor Bureau  
Hilton Richmond Downtown  
Hilton Virginia Beach Oceanfront  
The Hotel Roanoke & Conference Center  
Renaissance Portsmouth-Norfolk Waterfront Hotel  
Sheraton Virginia Beach Oceanfront Hotel  
VisitNorfolk

### PATRON

Asset Protection Group, Inc.  
Boar's Head  
Craddock Terry Hotel & Conference Center  
DoubleTree by Hilton Richmond-Midlothian  
DoubleTree by Hilton Williamsburg Exhibits, Inc.  
Fredericksburg Regional Tourism Partnership  
The Greenbrier  
Lynchburg Tourism MemberClicks  
Naylor Association Solutions  
Omni Charlottesville Hotel  
Omni Richmond Hotel  
Richmond Marriott Downtown  
Richmond Region Tourism  
The Tides Inn  
Virginia Beach Resort Hotel & Conference Center  
Visit Virginia's Blue Ridge  
Wyndham Virginia Beach Oceanfront

**GATHER A GROUP**  
FOR WORLD-CLASS PERFORMANCES

**THE WASHINGTON BALLET**  
*GISELLE*

**ROGER DALTRY**  
PERFORMS THE WHO'S *TOMMY*

**CHARLIE WILSON**  
*MOTOWN THE MUSICAL*

**YANNI**  
*KIDZ BOP LIVE 2018*

**AND MORE!**

**GROUPS SAVE! [WOLFTRAP.ORG/GROUPS](http://WOLFTRAP.ORG/GROUPS)**

## 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 Hotels 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 Hotels 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

## COLONIAL WILLIAMSBURG HOTELS



and delicious array of banquet menu 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 hotels 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 Hotels 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 Hotels**  
sales@cwf.org • (800) 822-9127  
colonialwilliamsburg.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 | [colonialwilliamsburghotels.com](http://colonialwilliamsburghotels.com)



*Colonial Williamsburg  
Hotels*

WILLIAMSBURG, VIRGINIA

## AROUND THE COMMONWEALTH



The reimagined **Cavalier Virginia Beach** reopened to the public and group clients on March 7 after a \$82 million renovation. It will host VSAE's CEO & Senior Staff Retreat in September.

**Marcia Tetterton, MSG, CAE**, with the Virginia Association for Home Care and Hospice, has

been appointed to serve as the Vice President of the National Association for Home Care and Hospices (NAHC) Forum of States. In addition, Marcia will be serving as task force chair in Developing a National Home Care and Hospice Work Force Summit.



### HEALTH CARE CORNER

Internal Revenue Bulletin 2018-10 was released on March 5, 2018, indicating changes to the 2018 Health Savings Account "HSA" family maximum contribution limit. The family maximum contribution limit is being adjusted downward to \$6,850, from the previously announced limit of \$6,900 for 2018.

The maximum contribution limit for employee-only coverage did not change and continues to be \$3,450 for 2018. The catch-up contribution limit for people age 55 and older remains \$1,000 for 2018 as well.

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

## WELCOME NEW MEMBERS

### EXECUTIVES

**Marcia Tetterton, MSG, CAE**

*VA Association for Home Care & Hospice  
Henrico*

**Gail Queen**

*National Alliance of State  
Pharmacy Associations  
Richmond*

### ASSOCIATES

**Kurt Krause**

*Marriott Virginia Beach  
Oceanfront  
Virginia Beach*

**Rebecca Stannard**

*Nemacolin Resort  
Farmington, Pa.*



### 2017-2018 OFFICERS

**Scot P. McRoberts, MPA, IOM**  
*President*

**Ray Mattes, III, CAE**  
*President-Elect*

**Duront "D." Walton, Jr., CAE**  
*Treasurer*

**Phyllis Errico, JD, CAE**  
*Secretary*

**Barbara Homiller, CAE**  
*Immediate Past President*

**Brandon Robinson, CAE**  
*Executive Director*

### DIRECTORS

**Maureen Dingus, CAE**

**Courtney Fleming**

**Nancy Israel, MPA**

**Shannon McCabe, CAE**

**Ashton D. "Danny" Mitchell, III, AAI, AAI-M**

**Gail Phillips, CAE**

**Jim Roman**

**Matthew Stanley**

**Steven Williams**

**Tom Witt**

### ASSOCIATION PRESS

Published by the Virginia Society  
of Association Executives

*2924 Emerywood Parkway  
Suite 202*

*Richmond, Virginia 23294*

*PHONE: (804) 747-4971*

*FAX: (804) 747-5022*

*EMAIL: info@vsae.org*

*WEB: vsae.org*

**Brandon Robinson, CAE**  
*Editor*

**Lorraine Meade**  
*Content, layout, and design*

**Art and Editorial Deadline  
for the May Issue**  
*April 27*

**Advertising Space**  
Contact **Brandon Robinson, CAE**  
*(804) 249-2234  
brandon@vsae.org*

This newsletter is proudly printed by:



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



**(434) 485-7295 / Lisa.Meriwether@LynchburgVA.Gov**

**www.LynchburgVirginia.org**