



**July 19-21, 2023**

***Remarkable Lake County***

***Four Points by Sheraton Cleveland-Eastlake***

*Platinum Sponsor*



*An Independent Registered Investment Advisor*

# OSAP Annual Conference 2023 Schedule

## Wednesday, July 19, 2023

1:30 - 2:00 PM	<b>Exhibitor Showcase Opens!</b>
2:00 - 3:45 PM	<b>Opening Keynote Session:</b> <i>Evolve Your Leadership in 5!</i> - Andre Young
4:00 - 5:00 PM	<b>Concurrent Session 1:</b> <i>Overcoming Common Barriers To Creating and Executing a Strategic Plan</i> - Ricky Chilcott
	<b>Concurrent Session 2:</b> <i>Navigating the Social Media Sea</i> - Nicole Volk
	<b>Concurrent Session 3:</b> <i>AI and Your Association: Getting Started Today</i> - Ray Waite
5:00 - 5:45 PM	<b>Exhibitor Showcase Reception</b>
5:30 - 6:15 PM	<b>"New-Bees" Reception:</b> <i>For first-time attendees of the conference. This reception is by invitation only, please.</i>
6:45 - 9:00 PM	<b>OSAP Board Chair's Reception:</b> <i>Open to all attendees, this event is a relaxed social event providing the opportunity to connect with other attendees in an atmosphere full of fun. We hope you can join us!</i>
7:30 - 9:00 PM	<b>Ice Cream Sunset at the Beach Excursion:</b> <i>This optional event offers transportation to Fairport Harbor Creamery where all ice cream is made in house and offers creative treats with a boozy twist. Enjoy your treat while watching the beautiful Lake Erie sunset. Seating is limited.</i>

## Thursday, July 20, 2023

7:30 - 8:30 AM	<b>Breakfast</b>
7:30 - 8:30 AM	<b>CAE Breakfast</b> <i>(invitation only)</i>
8:30 - 9:45 AM	<b>Keynote Session:</b> <i>HIT HARD: Three Must-Have Mindsets to Build Resilience</i> - Paul Artale
9:45 - 10:00 AM	<b>Exhibitor Showcase Break</b>
10:00 - 11:00 AM	<b>Concurrent Session 4:</b> <i>Common HR Pitfalls To Avoid</i> - Andrew Cleves  <b>Concurrent Session 5:</b> <i>Design Thinking: A Better Way To Solve Problems</i> - Ray Waite  <b>Concurrent Session 6:</b> <i>Young Member Engagement Using Behavioral Science</i> - Dr. Gleb Tspursky

## Thursday, July 20, 2023

11:00 - 11:30 AM	<b>Exhibitor Showcase Coffee Bar</b> <i>Presented by Shores and Islands Ohio</i>
11:30 AM - 12:45 PM	<b>OSAP Foundation Lunch</b>
12:45 - 1:00 PM	<b>Exhibitor Showcase Break</b>
1:00 - 2:00 PM	<b>Concurrent Session 7:</b> <i>Meet Me in Ohio: Understanding Issues and Opportunities for Meeting Planners and Suppliers</i> - Melinda Huntley  <b>Concurrent Session 8:</b> <i>The Power of Referrals and Retention</i> - Barbara Burgie  <b>Concurrent Session 9:</b> <i>Developing an Ethical Workforce</i> - Rick Mangini
2:00 - 3:15 PM	<b>Keynote Session:</b> <i>Leveraging Hybrid Work to Improve Retention and Productivity</i> - Dr. Gleb
3:30 - 4:30 PM	<b>Concurrent Session 10:</b> <i>Yespitations, Absurdities and Other Unexpected Drivers of Growth</i> - Heather Whaling  <b>Concurrent Session 11:</b> <i>Retirement Planning in an Uncertain Economy</i> - Jim Saling  <b>Concurrent Session 12:</b> <i>Maximum Ability: How to Recruit and Retain Employees With (Dis)abilities</i> - Paul Artale
4:30 - 5:15 PM	<b>Exhibitor Showcase Reception</b>
6:15 PM	<b>Depart For Evening Activities</b> <i>Presented by Remarkable Lake County</i>

## Friday, July 21, 2023

7:30 - 8:30 AM	<b>Coffee Break</b>
8:30 - 9:30 AM	<b>Concurrent Session 13:</b> <i>Why Member Benefits Matter as Much as Punctuation</i> - Tim McNichols  <b>Concurrent Session 14:</b> <i>Advocacy: Tools to Advance Your Association's Cause</i> - Gary Smith  <b>Concurrent Session 15:</b> <i>Managing Your Reputation When Crisis Strikes</i> - Jeremy Neuhart
9:30 - 10:30 AM	<b>Exhibitor Showcase Brunch</b>
10:30 AM - 12:00 PM	<b>Closing Keynote Session:</b> <i>Mind Shift! Becoming a Success Savage</i> - Dustin Dale



# 2023 ANNUAL CONFERENCE

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## EDUCATIONAL SESSIONS

**OPENING KEYNOTE SESSION: WEDNESDAY 2:00 – 4:00 PM**



### **Evolve Your Leadership in 5!**

Andre Young

Speaker, author, leadership trainer and founder  
You Evolving Now, LLC

Leadership doesn't just happen. It's an evolution. Andre Young's diverse range of experiences and expertise as a mental health therapist, combined with his own personal evolution and achievements, led him to create a unique and empowering movement through his training company, You Evolving Now, LLC. He maintains that every company, team and person is capable of their definition of success, expanding their definition of success, creating a positive culture, getting more out of life and evolving into a better self.

In this session, participants will gain practical insights, strategies, and techniques that can be implemented immediately to enhance leadership skills, foster a positive work culture and achieve a harmonious work-life balance.

Specifically, participants will learn about:

- The five key areas where leaders focus their time to live a successful life both professionally and personally.
- The definition of leadership and how to assess your own leadership skills across different professional roles.
- The five different types of employees and discover what each type requires most from their leaders at present.
- The seven languages that team members need, want and benefit from most when it comes to leadership communication and how to conduct impactful one-on-one meetings
- The three fundamental building blocks for leadership and team success to create a strong foundation for leadership and team dynamics.

**CAE Knowledge Domains: Executive Leadership, Business Development**

## CONCURRENT SESSIONS: WEDNESDAY 4:00 – 5:00 PM



### Overcoming Common Barriers To Creating and Executing a Strategic Plan

Ricky Chilcott  
Co-founder  
Mission Met

Simple and effective strategic planning is a required and non-negotiable component of success in every organization. Good execution begins with good planning. In this session, Ricky will provide nonprofit leadership (executive directors and board members) with foundational strategies that will help them both create and execute a strategic plan.

In this session, Ricky will also share some specific examples of how nonprofit executive directors have overcome the following strategic planning barriers including:

- The executive director doesn't champion the planning process.
- Nonprofit strategic plans are often too complex.
- Planning is viewed as an event, not a process.
- Weak goals.

**CAE Knowledge Domains: Governance, Executive Leadership, Organizational Strategy**

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### Navigating the Social Media Sea

Nicole Volk  
Graduate research associate  
The Ohio State University

In a vast ocean of social media, how do you know which channels are best for your organization? Discover a better understanding of what channels are available and which ones will be the best fit.

Your association already has *Facebook*, *Instagram* and *Twitter*. But have you considered *TikTok*, *Pinterest* or *Snap Chat*? And how in the world are you supposed to manage all these sites anyway? Develop a better understanding of the available social media channels and discover best tips and tricks for successfully navigating and managing the channels you choose to use for your organization.

In this session, you will learn how to:

- Develop a better understanding of current popular social media channels.
- Discover tips and tricks to develop content that best fits each platform.
- Learn how to identify your association's audience to select the best social media channels.

**CAE Knowledge Domains: Marketing and Communications, Member and Stakeholder Engagement and Management, Operations**



## **AI and Your Association: Getting Started Today**

Ray Waite  
Founder  
Lighthouse Force

In today's fast-paced and highly competitive business world, business owners are always looking for new and innovative ways to gain an edge over their competitors.

Enter artificial intelligence (AI), a game-changing technology that has rapidly become a necessary tool for small business owners and associations, with its ability to automate processes, analyze vast amounts of data and make accurate predictions that can help drive business growth and success.

AI technology can be overwhelming for small business owners due to the multitude of available tools and the extremely fast pace of innovation. It's not uncommon to feel confused and unsure of where to start in your search for the right tools that fit you and your business. Ray will demystify AI technology by explaining the fundamentals and future direction of AI and helping you identify and map your unique business needs to what AI can offer and create a plan for finding the right technology that works for you!

In this session, you will gain a clear understanding of:

- The fundamentals of artificial intelligence, machine learning, deep learning, neural networks and how that knowledge can benefit your AI investment decisions.
- The potential future developments of AI.
- The current concerns and opportunities surrounding AI.
- The various categories of AI use cases and how to identify the ones relevant to your business.
- How to map your business needs and use cases to AI solutions.
- A guide for developing your AI implementation plan.
- Common pitfalls to avoid when introducing AI to your business.

**CAE Knowledge Domains: Organizational Strategy, Operations, Business Development**

## KEYNOTE SESSION: THURSDAY 8:30 – 9:45 AM



### **HIT HARD: 3 Must-have Mindsets to Build Resilience**

Paul Artale, Ph.D.

Award-winning speaker, author, researcher and trainer

What does your ultimate life look like to you? What is standing in the way of achieving those goals? Obstacles and adversities are part of every journey. Although you cannot change the adversities that occur you can learn to build resilience and thrive through your challenges.

Born with what some would call a physical “disability,” Paul uses his journey of playing college football to teach you the three must-have mindsets that will help you smash through adversity, exceed your expectations, and live your best life. Hit Hard is the powerful, high-energy keynote that will help you leverage your abilities and become unstoppable.

In this session, you will learn how to:

- Tackle imposter syndrome and other toxic thought patterns.
- Apply the simple but vital three-step process to create a winning mindset.
- Identify and leverage your strengths to attain your goals.
- Draft your success team.
- Understand the one characteristic of high-performance teams.

**CAE Knowledge Domains: Executive Leadership, Member and Stakeholder Engagement and Management**

## CONCURRENT SESSIONS: THURSDAY 10:00 – 11:00 AM



### **Common HR Pitfalls to Avoid**

Andrew Cleves

Labor & employment partner

Frantz Ward, LLP

In this session, Andrew will address common human resource (HR) pitfalls that can lead to time-consuming and expensive litigation. The presentation will discuss how these pitfalls often arise and what steps human resource professionals and management can take to avoid them.

In particular, the presentation will delve into potential pitfalls that arise in all HR phases of business operations, from the hiring and pre-employment process to issues that arise during employment, to post-employment and pre-litigation scenarios.

**CAE Knowledge Domains: Executive Leadership, Operations**

## CONCURRENT SESSIONS: THURSDAY 10:00 – 11:00 AM



### **Design Thinking: A Better Way to Solve Problems**

Ray Waite  
Founder  
Lighthouse Force

As businesses continue to face increasingly complex challenges in a highly competitive and rapidly evolving landscape, traditional problem-solving approaches are no longer sufficient. This is where design thinking comes in as a powerful methodology that can help your businesses and organizations navigate and solve these difficult problems.

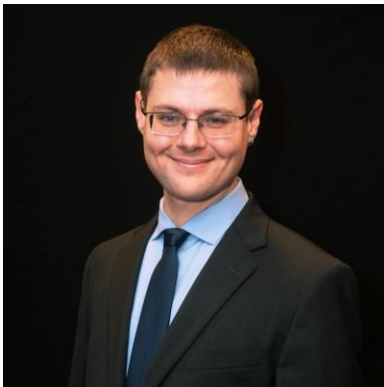
Design thinking involves immersing oneself in the user's world, exploring innovative solution paths and constantly testing and incorporating user feedback into the process. Design thinking is not simply about learning a set of tools or techniques, but rather represents a fundamental shift in mindset towards problem-solving.

In this hands-on workshop, you will have the opportunity to practice and learn the fundamental principles of design thinking and how they can be applied in your business to:

- Solve complex problems.
- Enhance your products and processes.
- Gain a range of practical tools and techniques to aid you in navigating each phase of the design thinking process.
- Understand the ways in which adopting design thinking principles can help you become a more effective leader and business owner.

**CAE Knowledge Domains: Governance, Executive Leadership, Operations, Business Development**

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### **Young Member Engagement Using Behavioral Science**

Dr. Gleb Tsipursky  
CEO  
Disaster Avoidance Experts

Are you an association professional seeking to enhance your engagement strategies with young members? Join us for an engaging, interactive, and entertaining presentation that will transform your ability to excel at engaging young association members. Discover cutting-edge research from cognitive neuroscience and behavioral economics that debunks prevalent myths and sheds light on the cognitive biases hindering successful engagement.

During this session, he will explore how cognitive biases have led to judgment errors, impairing association leaders' ability to effectively engage young members. Biases such as the false consensus effect have caused senior professionals to view junior members as younger versions of themselves, resulting in critical mistakes in engagement strategies. It's time to challenge these assumptions and understand the unique perspectives of young members.

Additionally, he will present real-world case studies and best practices, complemented by groundbreaking research in cognitive neuroscience and behavioral economics. You will leave with the most critical skills and takeaways that you need to address cognitive biases and excel at engaging young association members.

**CAE Knowledge Domains: Member and Stakeholder Engagement and Management, Executive Leadership, Business Development**



## CONCURRENT SESSIONS: THURSDAY 1:00 – 2:00 PM



### **Opportunities for Meeting Planners & Suppliers**

Melinda Huntley  
Executive director  
Ohio Travel Association

Having a strong association meeting market is good for everyone. Understanding the barriers that hinder attendee attraction and the overall success of meetings and conferences is crucial.

In this session, participants will gain insight into the current trends and forecasts of the business group travel market. Melinda will explore creative ways meeting planners and suppliers can work together to overcome obstacles and position Ohio as a premier destination for association meetings and conferences, both now and in the future.

**CAE Knowledge Domains: Member and Stakeholder Engagement and Management, Marketing and Communications**



### **The Power of Referrals and Retention**

Barb Burgie  
Owner  
Burgie Media Fusion

Member retention is a constant concern for member-centric organizations. With more than 200 million search results on Google, it's evident that many are seeking effective strategies. The real question is, are you prepared to tackle member retention head-on when the time comes?

Join us for an engaging session led by Barb Burgie, visionary and leader of Burgie MediaFusion, as she unveils current trends that have proven successful in member retention. Beyond retention, Barb will delve into how to empower your members to become advocates and refer your organization to others. Don't miss this opportunity to learn how to transform your members into enthusiastic advocates who refer your organization to others.

**CAE Knowledge Domains: Marketing and Communications, Business Development, Member and Stakeholder Engagement and Management**

## CONCURRENT SESSIONS: THURSDAY 1:00 – 2:00 PM



### **Developing an Ethical Workforce**

Rick Mangini  
Executive vice president  
MBA Research and Curriculum Center

Have you ever faced an ethical dilemma within your organization and wished you were more prepared to resolve it?

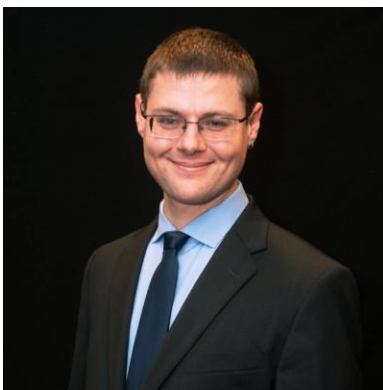
Join us to learn how MBA Research and Curriculum Center is preparing the future workforce with the most important skills for success—including those related to ethical leadership and problem-solving in the workplace.

MBA Research and Curriculum Center, located in Columbus, Ohio, works extensively with business educators, marketing educators, business leaders and industry experts across the U.S. to make sure that students are learning the necessary skills in the classroom to be successful and ethical in the workplace.

Come and learn how we bring students, teachers and the current workforce together to make sure students go into the workforce with the right know-how and learn how you can connect with education to help build the future pipeline.

**CAE Knowledge Domains: Executive Leadership, Operations**

## KEYNOTE SESSION: THURSDAY 2:00 – 3:15 PM



### **Leveraging Hybrid Work to Improve Retention and Productivity**

Dr. Gleb Tsipursky  
CEO  
Disaster Avoidance Experts

Associations have a unique opportunity to leverage the power of hybrid work to improve retention, productivity, and cut costs. While many leaders still rely on traditional office-centric collaboration and leadership styles, research has conclusively shown that a flexible hybrid-first work model yields the best outcomes. This forward-thinking approach goes beyond

incremental improvements. It embraces a new paradigm that enhances retention, productivity, engagement, innovation, collaboration and risk mitigation – all while reducing costs.

He will delve into the best practices adapted specifically to the context of hybrid work. From virtual coworking to weekly performance evaluations, addressing proximity bias and fostering a culture of "Excellence from Anywhere," you will learn actionable strategies that have been proven highly effective in real-world settings. In this transformative session, you will be equipped with the tools to embrace a hybrid-first work model, harness the full potential of your hybrid teams and navigate the future of work with confidence. Don't miss this opportunity to learn how to dramatically improve your ability to drive retention, enhance productivity and cut costs by leveraging the dynamic world of hybrid work.

**CAE Knowledge Domains: Executive Leadership, Operations, Organization Strategy**

## CONCURRENT SESSIONS: THURSDAY 3:30 – 4:30 PM



### **Yespirations, Absurdities & Other Unexpected Drivers of Growth**

Heather Whaling  
President & Founder  
Geben Communication

Say “yes” to uncovering unexpected drivers of growth, including how Heather Whaling discovers the motivations and aspirations that keep both she and her team energized, connected, committed and focused on growth.

If you do what you’ve always done, you’ll get what you’ve always gotten. Ready for what’s next? New growth requires new approaches, which is exactly what attendees will learn during this presentation from Heather Whaling. Heather shares her tips and tricks – plus a few hard-earned lessons along the way – about how she built a multi-million-dollar business, with consistent year-over-year growth, despite two recessions, a global pandemic and zero outside investors. Attendees will gain new strategies and processes to implement, inspiring their teams to think bigger and bolder while accelerating growth and impact along the way.

In this session you will learn:

- How to leverage adversity to spark growth.
- Actionable steps to identify drives and drains and keep focus on where they add the most value.
- Proven, innovative approaches to workplace policies and talent retention to apply in your own roles.

**CAE Knowledge Domains: Executive Leadership, Organizational Strategy, Operations, Business Development**



### **Retirement Planning in an Uncertain Economy**

Jim Saling, CIMA, CPWA, CPFA, AIF  
President

Peggy N. Slaughter, CFP, CRPS, AIF, CPFA  
Retirement plan consultant  
Saling Simms Associates

The Employee Benefit Research Institute conducted an online survey earlier this year and found that retirement confidence among workers has dropped to 64 percent. This is the lowest level since 2008 when America was on the cusp of its credit-crunch recession.

In this session, Jim and Peggy, veterans of the financial services industry, will share tools and strategies that will enable you and your employees to pursue your retirement goals despite an uncertain economic landscape.

**CAE Knowledge Domains: Operations, Organizational Strategy**

## CONCURRENT SESSIONS: THURSDAY 3:30 – 4:30 PM



### **Maximum Ability: How to Recruit and Retain Employees with (Dis)abilities**

Paul Artale, PhD.

Award-winning speaker, author, researcher and trainer

One in every five Americans has a (dis)ability, more than 55 percent of Americans will have a disability before they retire, and the buying power of individuals with (dis)abilities is \$1 trillion per year. Despite these facts showing that (dis)ability is part of every workplace and transcends all identities and affinities, most organizations struggle to create work

environments that attract, accommodate and retain persons with (dis)abilities. During this session, Paul goes beyond the Americans with Disabilities Act (ADA) and helps you understand the personal, social and medical needs of persons with (dis)abilities in order to attract and retain this extremely underutilized talent pool. Maximum Ability incorporates Paul's personal experience as an individual with a physical (dis)ability, his training as a special education teacher, current social conditions and the latest (dis)ability research to create a presentation that is information-packed, practical and challenges common assumptions.

In this session, you will learn to:

- Understand disability as a social construct while defining microaggressions and how to combat them.
- Devise strategies and considerations for different types of (dis)abilities and conditions.
- How to create recruitment pipelines to access highly qualified employees with (dis)abilities.
- Incorporate three strategies that will allow employees with (dis)abilities to become your top performers.
- Discover best practices for on-boarding employees and much more, including the key tenets of Disability Identity Theory.

**CAE Knowledge Domains: Executive Leadership, Operations, Organizational Strategy**

## CONCURRENT SESSIONS: FRIDAY 8:30 – 9:30 AM



### **Why Member Benefits Matter as Much as Punctuation**

Tim McNichols

Executive Director of Partnership

LIG Solutions

There is a big difference in the meaning of "No more member benefits!" and "No, *more* member benefits!" Just like making sure you have nailed your punctuation, it is equally important to doublecheck your member benefit programs. It is vital that programs align not only with your membership but also with your organization's non-dues revenue needs. Having a misplaced benefit can change the dynamics of your membership as much as a missing comma in a sentence.

In this presentation we will look at some real-world examples and explore the questions that might keep you up at night like "Why do members join?" and "Why do members stay or leave?" as there is more to this than you think. This goes hand in hand with what type of benefits members want and why you offer member benefits in the first place, which has a direct impact on your organization's non-dues revenue. In this session, participants will learn how to create the right mix of member benefit options that your members really want and, more importantly, *need* enabling your organization to build substantial non-dues revenue year over year.

**CAE Knowledge Domains: Business Development, Member and Stakeholder Engagement and Management**

## CONCURRENT SESSIONS: FRIDAY 8:30 – 9:30 AM



### **Advocacy: Tools to Advance Your Association's Cause**

Gary Smith  
President & founder  
Statehouse Strategies, LLC

There are a wide variety of associations in Ohio of varying interests, size and sophistication. However, what nearly everyone has in common is the desire to advance your organization's strategic initiatives, public policy goals and member interests.

The best ideas and intentions are useless, however, if you do not have the knowledge to understand how to get them implemented. Understanding how to be an effective advocate for your organization is one way to increase your efficacy and may even help you attract additional membership. Information is power. Participation in the process is empowering. As the old saying goes, "You're either at the table, or you're on the menu."

Gary possesses more than 20 years of experience working at various levels of Ohio state government and as a client advocate. In this session, he will discuss the variety of ways to engage public policy officials in Ohio to advance the goals of your membership and your organizations.

**CAE Knowledge Domains: Advocacy, Member and Stakeholder Engagement and Management**

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### **Managing Your Reputation When Crisis Strikes**

Jeremy Neuhart  
Vice president, communications and public affairs  
ColdSpark

Promoting, protecting and, when necessary, defending your reputation is critically important to your organization.

In this session, we will discuss how to navigate the delicate landscape of media and stakeholder relations when issues or crises appear. Using tried-and-true principles modified for a modern, digital-first environment, as well as some classic examples, you will take away practical advice about how to get ready for rapid response.

**CAE Knowledge Domains: Marketing and Communications, Member and Stakeholder Engagement and Management**

## CLOSING KEYNOTE: FRIDAY 10:30 – 12:00 PM



### Mind Shift! Becoming a Success Savage

Dustin Dale

Speaker, executive leadership trainer and best-selling author

Dustin Dale's life mission was redefined on Nov. 21, 2021, when he was told by doctors that that he was headed toward death from an autoimmune disease. In four days, Dustin realized his mission still needed to be finished.

During his many treatment sessions in an oncology department, Dustin wrote his first best-selling book, *Learn to Lead by Serving*. In the book, he shares his knowledge and experience of 10 years leading more than 1,000 teams and more than 3,500 people for major corporate companies.

One of the most complex aspects of being human is becoming stuck in our ways and never breaking repeated patterns, only to find zero progress in our goals. This energizing keynote will help you understand how the mind sees a plan, how to inspire the mind to take action and how to celebrate the small wins. Dustin's powerful message will leave you reflecting on what areas you need to improve to become your best version.

**CAE Knowledge Domains: Executive Leadership, Member and Stakeholder Engagement and Management**



OHIO SOCIETY OF  
ASSOCIATION  
PROFESSIONALS



FOUR POINTS  
BY SHERATON

*Thank you for attending!*