

WSAE AAW Meeting Agenda

Friday, March 22, 2013

9:00 – 10:00 AM CT

Conference Call Line 610.214.0200, PIN 929936#



ITEM	ACTION	PRESENTER	TIME
Call to Order <i>Members</i> – Chair Dave Baumann, Board Liaison Barb Kachelski, Paul Borawski , Becky Brandt, Ben Butz, Carrie Falk, Brent Foerster , Michelle Mason, Kristin Ouweneel, Christine Pepper, Celeste Rom, Mike Theo, Paul Upchurch , Theresa Witham <i>Expected Absences</i> – Deb Archer, Rosemary Tenuta <i>WSAE Staff</i> – Lynda Patterson, Jen Brydges, Laura Portz			
I. Old Business			
A. Review of Report to WSAE Board of Directors	Review	Baumann, Kachelski	10 min
B. Report of Washington/ASAE Meeting	Review	Task Force Volunteers	30 min
II. New Business			
A. Task Force Work Group Formation			
i. Survey development: being data driven	Present	Baumann	7 min
ii. Communications tool(s) development – a career in associations	Present	Baumann	7 min
iii. Competencies of entry level/early career association professionals	Present	Baumann	7 min
iv. Institutional relations	Present	Baumann	7 min
III. Action Items			
A. Volunteer?			
B. Schedule in person meeting			
Adjournment			

ENCLOSED MATERIALS

Report of Washington/ASAE Meeting
 AssociationExecs.com
 Association Management Certificate Program
 Roster (*updated*)

UPCOMING EVENTS

- Next Meeting TBD

Associations Advance Wisconsin – Meeting with ASAE Staff

February 20, 2013

ASAE Staff: Chris Vest, Director, Public Policy; Jamie Sadler, Certified Instructional Designer; Lori Furtato, Director of Credentialing

AAW Representatives: Theresa Witham, CUES; Ben Butz, EDI; Kristin Ouweneel, EDI

Power of A: Chris Vest

ASAE broadened the program to “Power of A” to reach a larger audience. Rebranded the program so that it wasn’t only associated with ASAE – trying to establish its own, but closely related, industry brand. They are also striving to showcase associations as a profession/industry and separate to the mission of the individual organizations (frequently associations are seen as special interests and not part of a larger sector).

Important take-aways: facetime is very important when dealing with decision makers, personal stories that are shared with staffers are the most impactful way to get your message to resonate with decision makers, and we need buy-in from the other WI associations.

Other state programs that have adopted Power of A: GA, NC, Association Forum of Chicagoland

Certification Program: Jamie Sadler

Certification Program designed for association professionals with 3-5 years of experience to help them realize they should pursue a career in association management. About 200 individuals have been certified so far (plus 40 facilitators).

Online courses are available – “Principles of Association Management” is similar but does not result in a certificate (only a certificate of completion). It’s comparable to day one of the certificate program.

The course structure came out discussions with counterparts in Singapore who wanted in person meetings for the course to be more impactful and to facilitate networking

Association Headquarters (an AMC with a license to administer course) is integrating the certificate program with a local post-secondary institution.

Registration for the 5 day program starts at \$1,295, and single courses start at \$325 each. The cost of the program excludes expenses for travel and incidentals.

Competencies: Lori Furtato

ASAE completes a CEO job analysis every 5 years. Data compiled is used to identify core skills and competences of a CEO and to edit domains of the CAE exam. They survey CEOs, CAES, non-CEO level members.

Certificate program used core data from the CEO job analysis to create the certificate program.

David Baumann**From:** AssociationExecs.com [guy@associationexecs.com]**Sent:** Tuesday, March 12, 2013 9:04 AM**To:** David Baumann**Subject:** Win MORE Association BusinessProblem viewing this email? [Click here](#) for our online version | [Send to a friend](#)

AssociationExecs.com

The association community is a goldmine for management consultants. The secret is knowing how to "mine" data on specific executives, budgets and associations to connect with the right prospects in the right way. The more data - and tools - you have, the more power you have to win highly profitable engagements

Grow your management consulting firm with AssociationExecs.com

Maximize and expand your association client base --fast

**SIGN UP FOR A
FREE 2-DAY TRIAL TODAY!**

This one powerful tool brings you:

- The **largest database** of association executives and organizations in the field - so you don't have to worry about overlooking profitable new business opportunities
- **Daily updates** - so you don't waste a second with out-of-date contacts
- **Thoroughly vetted** - Associations covered in the database meet strict criteria including full-time staff and solid budget so you can focus on viable prospects
- **Advanced search** and report features - filters make it easy to target by specific location (even down to zip code), budget, staff size and more. Plus, save time by saving your searches

New CRM Capabilities!

So versatile - you can print and export information to create call lists, networking notes, or mailing lists. Plus, the new **Lead Tracker** feature gives you CRM functionality by syncing with your Outlook or iCalendar to track interactions and schedule follow-up reminders

Get the edge over other management consultants!

CUSTOMIZABLE. FOCUSED. ENGAGING.

ADVANCE YOUR CAREER

ASAE's Certificate Program in Association Management gives you the fundamentals and a core knowledge-base in association management.

ASAE has recently launched the Certificate Program in Association Management, developed to provide association professionals with less than five years of experience an opportunity to enhance their knowledge and skills in the association world. Through an instructionally designed curriculum-based certificate program, participants are given the knowledge necessary to apply a more systematic approach to their work and improve the success of their organizations.

How will the Certificate Program be of benefit?

The Certificate Program consists of five one-day courses that can be taken together or individually. The individual courses consist of: Essential Practices in Association Management, Effectively Managing Volunteer Committees and Task Forces, Membership Development, Communication and Public Relations and Developing Your Leadership Potential. Upon completion of the Certificate Program, participants will be able to:

- Review the meaningful role associations play within the industry, profession, and society;
- Appreciate the diverse nature of association management;
- Gain a solid foundation in the association management profession;
- Acquire effective governance tools to provide a framework for both employees and the association;
- Illustrate the various roles and relationships of those within the association governance structure;
- Examine core issues and trends within association management;
- Apply areas of learning to the overall association;
- Build a solid network of professionals in the association management field; and
- Commit to career growth within association management.

Those who participate in the program can earn hours toward their Certified Association Executive Designation (CAE). Upon completion of each course, participants will receive 5.5 CAE Hours and 27.5 Hours for completion of the five-day program. Upon completion of the five courses, participants will receive the Certificate in Association Management issued by ASAE University.

How does the Certificate Program differ from the CAE?

The Certificate Program in Association Management is an excellent stepping-stone for meeting the CAE eligibility requirements as those who complete the Certificate Program earn 27.5 CAE Hours. The Certificate Program is a comprehensive training program which focuses on an association management curriculum. It is a curriculum-based certificate that covers a focused area of knowledge and skills.

The Certified Association Executive (CAE) certification is a designation that confirms the required association management knowledge has been acquired. In order to receive the CAE credential, individuals must meet certain eligibility requirements, submit an application, and pass the CAE exam. After sitting for and passing the exam, participants receive their CAE.

Where are additional courses offered?

ASAE offers the Certificate Program in Association Management in their Washington, DC offices each year in January and July. In addition, several domestic and global organizations have partnered with ASAE University to offer the course content in multiple locations and at various times throughout the year. Facilitators from the following organizations have been trained and approved by ASAE University to offer the Certificate Program in Association Management.

Licenses information and additional program offerings in the various territories can be found at www.asaecenter.org/ApprovedLicenses.

Organization	Territories Represented
AMP Management Services	Colorado, Nebraska, Kansas, Kentucky, Missouri, and Tennessee
Association Headquarters, Inc.	Delaware, Maryland, New Jersey, New York, and Pennsylvania
China Association for Science and Technology (CAST)	Members and Staff of CAST
CMP Management	Arkansas, Louisiana, New Mexico, Oklahoma, and Texas
Hallym University	The Republic of Korea
IntimXec Management Group	Iowa, Minnesota, North Dakota, South Dakota, and Wisconsin
LoBue & Majdany Management Group	California, Oregon, and Washington
LOGIC Management Consulting	Saudi Arabia, Emirati, Qatar, Kuwait, Bahrain, Oman, Egypt, Libya, Tunisia, and Sudan
MCI Group	MCI Staff Worldwide
The Sherwood Group	Illinois, Indiana, Michigan, and Ohio

Are additional content licensing opportunities available?

Although the organizations mentioned have already signed agreements with ASAE to offer the Certificate Program in Association Management, there are still opportunities available to license the content. Licensees will receive everything needed to educate staff with association fundamentals. Additional licensing information and requirements can be found at www.LicenseASAEContent.org.

“Having an entire week provided a great opportunity to network and enabled me to focus on my own professional development. The exercises provided thought provoking conversations and lead to many great ideas and incredible learning experiences.”

— Kyle Lambert London, CAE, e-Pro, RCE - National Association of REALTORS®

1. Essential Practices in Association Management
 - a. Association Management Foundation
 - b. Governance and Volunteer Management
 - c. Membership Value
 - d. Trends and Success Measures
 2. Effectively Managing Volunteer Committees and Task Forces
 - a. Volunteer Overview: Importance to Associations
 - b. Volunteer Recruitment and Retention
 - c. Volunteer Recognition and Rewards
 - d. Volunteer Management
 3. Membership Development
 - a. Offering Value and Purpose
 - b. Structuring the Membership Offering
 - c. Membership Recruitment
 - d. Membership Retention
 4. Communication and Public Relations
 - a. Maintaining a Positive Image
 - b. Communicating Your Message
 - c. Listening Effectively
 - d. Preparing and Delivering Presentations
 5. Developing Your Leadership Potential
 - a. Leadership Characteristics and Development
 - b. Team Development
 - c. Decision Making
 - d. Conflict Management
- The Certificate Program in Association Management is designed for professionals new to the association management profession. Each course contains four modules and can be taken individually or as part of the five-day certificate program.



ASSOCIATIONS ADVANCE WISCONSIN TASK FORCE 2012-2013 Roster

Dave Baumann, Chair

Chief Operations Officer, EDI
dbaumann@execinc.com ▪ 414.276.6445

Barb Kachelski, Board Liaison

SVP/Chief Operating Officer, CUES
barb@cues.org ▪ 608.271.2664 x 318

Deb Archer

President & CEO, GMCVB
archer@visitmadison.com ▪ 608.255.2537

Kristin Ouweneel

Association Executive, EDI ▪ Exec Director, AAEA
kristin@aaea.org ▪ 414.918.3190

Paul Borawski

Executive Director, ASQ
pborawski@asq.org

Lynda Patterson

President and Owner, AMP ▪ Exec Director, WSAE
lpatterson@manageassociations.com ▪ 608.310.7850

Rebecca Brandt

Association Exec, EDI ▪ Exec Dir, ISOQOL & AAMSE
rbrandt@isoqol.org ▪ 414.276.6445

Christine Pepper

Chief Executive Officer, NFDA
cpepper@nfda.org ▪ 262.814.1527

Ben Butz

Associate Executive Director, AAMSE
bbutz@aamse.org

Rosemary Tenuta

Director of Assessment Services, BoardSource
rosemary.tenuta@BoardSource.org ▪ 202.349.2543

Carrie Falk

Account Manager, The Payroll Company
carrief@payrollcompany.biz ▪ 608.826.1126

Mike Theo

President and CEO, WRA
mtheo@wra.org ▪ 608.241.2047

Brent Foerster

VP of Sales & Marketing, Visit Milwaukee
bfoerster@milwaukee.org ▪ 414.287.4226

Paul Upchurch

President & CEO, VISIT Milwaukee
pupchurch@milwaukee.org ▪ 414.287.4233

Michelle Mason

Managing Director, ASQ
mmason@asq.org ▪ 414.298.8789

Theresa Witham

Editor, CUES
theresa@cues.org ▪ 608.271.2664

Laura Portz

Administration, WSAE
lportz@wsae.org ▪ 608.310.7850

Jennifer Brydges

Associate Director, WSAE
jbrydges@wsae.org ▪ 608.310.7850