2023-2024 CalSAE Education Plan

THE CORE OF CalSAE's EDUCATION PLAN

CalSAE's mission and vision are to advance the association profession by inspiring, empowering, and connecting members through knowledge, valued relationships, and trusted resources. CalSAE endeavors to deliver exceptional experiences in a supportive, welcoming and inclusive environment where all are welcome.

By creating opportunities for members to exchange knowledge and resources, CalSAE delivers educational programming that is responsive to the changing dynamics of the association profession.

Through half-day, full-day, and multi-day in-person programs, virtual programming, CalSAE's robust suite of offerings is designed to deliver *something for every member.*

CONTENTS

- Overview
- CalSAE's Volunteer Professional Development Teams
- Industry Trends and Observations
- CalSAE Membership Composition
- CalSAE Education Strategy
- 2023-2024 Education Calendar
- Education Plan Highlights

OVERVIEW

Each year, CalSAE develops a robust Education Plan to serve as the foundation to provide professional development, learning and networking opportunities to CalSAE members. To refresh the programmatic suite of offerings, CalSAE staff take many factors into consideration, including the previous year's attendance numbers, satisfaction ratings, revenue health, membership composition and a plethora of other influences.

The Education Plan is informed by trends and industry observations - and serves as the framework for educational offerings that CalSAE provides at the local and statewide level.

CalSAE VOLUNTEER PROFESIONAL DEVELOPMENT TEAMS

CalSAE relies on the knowledge and experience of dedicated volunteers in the association community to help inform the programming offered throughout the year. The yearly education plan is developed by CalSAE staff, and then supported by the different committees and regional councils, as applicable when staff are seeking specific advisement, content recommendations or fulfilling speaker/faculty needs. The specific groups that CalSAE staff engages with when such needs arise include the following groups:

- Professional Development Committee
- ELEVATE "Steak" Subcommittee
- Regional Councils
- Seasonal Spectacular Committee

INDUSTRY TRENDS & OBSERVATIONS

CalSAE staff strive to keep pace with significant trends influencing the way associations operate. While CalSAE acknowledges and recognizes that the association industry is ever-changing and at times, quite challenging to stay ahead of the curve, in order stay relevant, CalSAE continues to seek understanding of consumer habits and behaviors to best serve the CalSAE membership.

CalSAE conducts member surveys and consistently reviews member demographics to identify any key shifts and identifies any potential implications. In addition, CalSAE understands the competitive landscape vying for the attention of our members. As such, business as usual is simply not an option when it comes to member engagement – and the suite of learning offerings must reflect cutting-edge, thoughtful, and timely content to have the most impact.

CalSAE MEMBERSHIP COMPOSITION

Below is an overview of the demographic composition of 1300+ CalSAE members.

Categories of CalSAE Membership - Association Professionals

Level of Leadership	Coordinator 13%	Manager 30%	Director 17%	Senior (CEO, CFO, VP) 40%
Function/Professional Responsibility Resp.	Membership & Marketing 29%	Education & Events 21%	Operations & Finance 25%	CEO 25%
Association Experience	Less than 5 years 10%	5-10 years 14%	More than 10 years 77%	Average/Median 18.3 years/16 years
Years in current job	Less than 5 years 44%	More than 5 years 56%		

Categories of CalSAE Membership - Industry Partners

Type	Quantity	Percentage
CVBs	56	20%
Hospitality	155	55%
Professional Services	70	25%
Owners/CEO/Senior	34%	

Membership Types

Type by Region	Bay Area	Capital	Oregon	SoCal	San Diego	(blank)	Grand Total
Association Profs	182	562	59	170	55	1	1026
Industry Partners	79	116	18	108	17	1	339
Grand Total	261	678	77	278	72	2	1368

CalSAE EDUCATION STRATEGY

CalSAE will continue to offer in-person and virtual programming for association professionals and industry partners, leveraging a variety of delivery styes and learning formats.

Signature Events

CalSAE's signature programs are multi-day events that cater to association professionals and industry partners by offering education, networking, and exhibiting opportunities. As the majority of CalSAE members reside near Sacramento, two of the three signature programs take place in Sacramento (Seasonal and MMS). The Annual Conference, ELEVATE, rotates between a NorCal and SoCal location, which will be held in SoCal in 2024.

- **Seasonal Spectacular**
  CalSAE's annual tradeshow that includes Education, Exhibits, and Appointments

- **ELEVATE**
  This annual conference will be held in-person offering education, networking, partner connections, and evening events. It will include 25-30 programs with 10-12 CAE credits.

Regional Events

In-person programs are offered across the five CalSAE regions across the year and include education and networking.

Specialty Events

Unique learning opportunities offered virtually and in-person to meet the mix of member needs.

- **AMC Retreat**
  Annual 1.5-day retreat with owners of Association Management Companies.

- **Associations 360**
  A day-long program for individuals new to being an association professional or industry partner, and for new members of CalSAE, to gain a solid understanding of the world of associations. Held October 2023 in the Sacramento area.

- **CAE Study Groups**
  Focused on meeting the needs of Certified Association Executive (CAE) candidates, the study group format is comprised of a 10-week series of virtual meetings held each Fall and Spring with CAE mentors assigned to assist candidates as they prepare for the certification exam by reviewing ASAE's CAE Study Guide.

- **Membership & Marketing Summit (MMS)**
  This is a full day program designed for membership and marketing professionals and will include C-Suite level content.

- **Insights Executive Summit**
  Specifically for advanced-level CEOs, a 1.5-day program with high level content in an intensive and interactive environment. This option includes interaction in all social aspects of the retreat

such as welcoming guests, dinner, breakfast, and lunches. Held February 2024, location TBD.

- **Women in Leadership**
Back by popular demand, this event will be an opportunity for female association professionals to learn, network, and experience an 'activity' of some kind in the Sacramento area.

- **Specialty Luncheons**
Quarterly luncheons held for association professionals to network and share challenges. *(NOTE: To be more inclusive, the regional councils strongly advise that these move beyond the CEO level.)*

Virtual Events
Offered across the year, CalSAE provides fingertip learning for members and non-members on relevant topics for the association professional and industry partner.

- **Webinars**
CalSAE is part of a national collaborative of other SAEs and webinars are provided twice each month (which become available as on-demand content) and produced by different SAEs on a variety of association management topics.

- **Couch Chats**
Free service for CalSAE members. Facilitator-led discussion groups dedicated to the four primary areas of association management: CEO/executive directors, membership & marketing, events & education, and operations & finance.

- **Alliance Learning Collective - Mid-Career Association Management Series**
In collaboration with The Association Societies Alliance (ASA), this new national program will provide virtual learning for cohorts on specific topics. Each cohort will be signing up for three 90-minute sessions held every two weeks. The Fall 2023 topic focus is on 'building facilitation skills.'

NEW Programming
CalSAE is keenly aware of the need to refresh the educational programming offered throughout the year by serving a broader audience in a variety of formats and locations. Below are three new events for the calendar year.

- **Business of Associations Webinars (virtual x3)**
In today's rapidly evolving workplace, association professionals are challenged to meet various operational challenges as they arise. From keeping up with ethical standards, to understanding employment-related risks and vendor contracts, the ever-changing association landscape is putting great demand on association leaders. This 3-part webinar series (sold individually) offers associations execs the opportunity to identify challenges and understand the right solutions to propel their organizations forward.
BONUS: One webinar will offer 1 CAE Ethics Credit which meets ethics requirement to earn and/or recertify the CAE credential.

- **CalCPA/CalSAE Conference for Finance Leaders (virtual)**
Partnership offering for financial leaders in the association space between CalCPA and CalSAE. Delivered virtually over two dates (August 31, 9-12:30 pm PT and September 14, 9-12:30 pm), this program will bring in thought leadership in areas such as DEI in the Finance function, new

accounting standards, ESG, audit preparation, liability issues, technology implications such as bitcoin, Ai, and more. The shared revenue from this collaborative venture will be split 50/50 between the two entities.

- **DEI Webinars (virtual)**
  CalSAE believes that diversity is a strength and has the potential to bring members together to co-create opportunities and solutions that elevate our industry. To help our members get momentum around their DEI initiatives, CalSAE invites associations and industry partners alike take the DEI pledge - and then dive deeper into the 10 recommended practices across three different webinars focused on these overarching categories: Setting the Foundation, Internal Focus – Engaging Staff and Volunteers, and External Focus – Engaging Members.

- **Membership & Marketing Webinar (virtual)**
  In today's attention economy (or lack-there-of), how can associations captivate their members, inspire new engagement, and cut through the clutter to prompt an action? With a plethora of marketing and membership 'experts' out there, how can association professionals know what trends to follow and what to disregard? In this timely, current, provocative, and fast-paced webinar, marketing and membership profs will gain insight into the right tools and tactics they can implement right away.

- **Speaker Showcase (virtual)**
  Ever wanted to have a 'trial-run' of your hired speakers before bringing them to your next big conference or event? Now's your chance for rapid immersion to hear keynote-caliber speakers deliver the essence of their talks. Get a sneak peek into their style, messaging, delivery – and with time to ask specific questions. This immersive speaker showcase will invite association professionals responsible for speaker selection at their conferences and events to properly vet the talent they hope to deliver exceptional experiences to their members.

2023-2024 EDUCATION CALENDAR

Name of Program	Description	Date	CAE Hours	Domain	In Person / Virtual
Maximize - How to Sell to Associations (NEW!)	Virtual offering for IP's on how to maximize their CalSAE membership for building relationships with associations for outreach and future sales.	Thursday, July 6, 2023	1	Domain 5: Business Development	Virtual
Association Leadership Academy	ongoing from launch in April 2023	Friday, July 14, 2023	~	Domain 1: Governance Domain 2: Executive Leadership Domain 3: Organizational Strategy Domain 4: Operations	Virtual
Association Leadership Academy	ongoing from launch in April 2023	Friday, August 11, 2023	~	Domain 1: Governance Domain 2: Executive Leadership Domain 3: Organizational Strategy Domain 4: Operations	Virtual
AMC Retreat	Annual two-day retreat for the owners/principals of association management companies to discuss challenges and share ideas.	Sunday, Aug 13 - Mon, Aug 14, 2023	10	Domain 1: Governance Domain 2: Executive Leadership Domain 3: Organizational Strategy Domain 4: Operations	In Person
Educational Program: Volunteer Relations focus	90-minute education session plus networking.	Friday, August 18, 2023	1.5	Domain 1: Governance	In Person
Speaker Showcase (NEW!)	The Speaker Showcase invites 5 keynote-caliber speakers to present their content with opportunity for audience Q&A.	Friday, August 25, 2023	1	Domain 5: Business Development	Virtual
CalCPA + CalSAE Symposium for Finance Leaders (NEW)	TWO, 3-hour virtual programs 9am-12:00pm PST (50 min session, 10 min break- repeat) *1 hour panel *1-hour interactive session *1 keynote	Thur, Aug 31, 2023 Thur, Sept 14, 2023	6	Domain 2: Executive Leadership Domain 3: Organizational Strategy Domain 4: Operations Domain 6: Member and Stakeholder Engagement and Management	Virtual

Sacramento State Intern Orientation (NEW!)	5-10 interns - followed by a midyear check-in at Associations 360	Thursday, September 7, 2023	~	All Domains	In Person
Fall CAE Study Group	10-week study group series	Wednesday, September 13, 2023	10	All Domains	Virtual
Association Leadership Academy	ongoing from launch in April 2023	Friday, September 15, 2023	~	Domain 1: Governance Domain 2: Executive Leadership Domain 3: Organizational Strategy Domain 4: Operations	Virtual
Maximize	AP focused	Tuesday, September 19, 2023	1		Virtual
Alliance Learning Collective #1	Mid-Career Association Management Series - Facilitation Skills - held across three 90min sessions	Wednesday, September 27, 2023	1.5	Domain 2: Executive Leadership	Virtual
DEI #1: Setting the Foundation (NEW!)	3 individual, 90-min webinar series linked to the CalSAE DEI Pledge on Recommended Practices to Engage Association in DEI	Friday, October 6, 2023	1.5	Domain 2: Executive Leadership	Virtual
Alliance Learning Collective #2	Mid-Career Association Management Series - Facilitation Skills - held across three 90min sessions	Wednesday, October 11, 2023	1.5	Domain 2: Executive Leadership	Virtual
Associations 360	Associations 360 - 2023 edition will weave in new and creative ways to serve CalSAE young professionals with a new mentoring focus.	Wednesday, October 18, 2023	6	Domain 1: Governance Domain 2: Executive Leadership Domain 3: Organizational Strategy Domain 4: Operations	In Person
Alliance Learning Collective #3	Mid-Career Association Management Series - Facilitation Skills - held across three 90min sessions	Wednesday, October 25, 2023	1.5	Domain 2: Executive Leadership	Virtual
Educational Program	Topic based on regional needs.	Friday, October 27, 2023	1.5	TBD	In Person
Couch Chat		November 2023 TBD	1	TBD	Virtual
Holiday Event with Educational Program	Topic based on regional needs.	Thursday, November 9, 2023	1.5	TBD	In Person

Holiday Event with Educational Program	Topic based on regional needs.	Thursday, November 16, 2023	1.5	TBD	In Person
Holiday Event with Educational Program	Topic based on regional needs.	Friday, November 17, 2023	1.5	TBD	In Person
DEI #2: Internal Focus – Engaging Staff and Volunteers (NEW!)	3 individual, 90-min webinar series linked to the CalSAE DEI Pledge on Recommended Practices to Engage Association in DEI.	Friday, December 1, 2023	1.5	Domain 1: Governance Domain 2: Executive Leadership Domain 4: Operations	Virtual
Seasonal Spectacular		Tuesday, December 12-Wednesday, December 13, 2023	3	Domain 4: Operations Domain 5: Business Development	In Person
Couch Chat		January 2024 TBD	1	TBD	Virtual
Educational Program	(2024 "kickoff" Trends - set the tone for the year...)	Friday, January 19, 2024	1.5	Domain 2: Executive Leadership	In Person
Membership & Marketing Webinar (NEW!)	membership and marketing focused - PAID webinar	Wednesday, January 31, 2024	1	Domain 6: Member and Stakeholder Engagement and Management Domain 8: Marketing and Communications	Virtual
DEI #3: External Focus – Engaging Members (NEW!)	3 individual, 90-min webinar series linked to the CalSAE DEI Pledge on Recommended Practices to Engage Association in DEI	Friday, February 2, 2024	1.5	Domain 2: Executive Leadership Domain 6: Member and Stakeholder Engagement and Management	Virtual
Maximize	serving both AP's and IP's	Thursday, February 8, 2024		~	Virtual
Spring CAE Study Group	10-week study group series	Wednesday, February 14, 2024	10	ALL	Virtual
Educational Program	(2024 "kickoff" Trends - set the tone for the year...)	Thursday, February 15, 2024	1.5	Domain 2: Executive Leadership	In Person
Insights Executive Summit		Thursday, February 22-Friday, February 23, 2024	10	Domain 1: Governance Domain 2: Executive Leadership Domain 3: Organizational Strategy Domain 4: Operations	In Person

Couch Chat		March 2024 TBD	1	TBD	Virtual
Women In Leadership (wine train)	Back by popular demand, this Women in Leadership event is designed for female association professionals to learn and network.	Friday, March 1, 2024	1.5	Domain 2: Executive Leadership	In Person
Educational Program	Topic based on regional needs.	Friday, March 8, 2024	1.5	TBD	In Person
The Business of Associations Webinar #1: ETHICS (NEW!)		Wednesday, March 13, 2024	1	Domain 2: Executive Leadership Domain 6: Member and Stakeholder Engagement and Management	Virtual
Couch Chat		April 2024 TBD	1	TBD	Virtual
ELEVATE Annual Conference		Monday, April 29- Wednesday, May 1, 2024	10	ALL	In Person
Couch Chat		May 2024 TBD	1	TBD	Virtual
The Business of Associations Webinar #2: LEGAL (NEW!)		Wednesday, May 8, 2024	1	Domain 4: Operations	Virtual
Educational Program	Topic: wellness/mental health	Friday, May 17, 2024	1.5	Domain 2: Executive Leadership	In Person
Couch Chat		June 2024 TBD	1	TBD	Virtual
The Business of Associations Webinar #3: HR (NEW!)		Wednesday, June 12, 2024	1	Domain 4: Operations 17% to 19%	Virtual
Membership & Marketing Summit	Annual Summit for marketing and membership professionals with **increased/new** sponsorship opportunities.	Friday, June 21, 2024	3.5	Domain 6: Member and Stakeholder Engagement and Management Domain 8: Marketing and Communications 12% to 14%	In Person
		TOTAL CAE HOURS	**105.5**		

EDUCATION PLAN HIGHLIGHTS

The 2023-2024 education plan proudly offers a variety of programs including:

- 9 NEW Programs

- Over 100 CAE Hours*
  - Note* this number is higher for the calendar year of 2023 but for the fiscal calendar of 23-24, doesn't consider the ALA since registrants signed up for that program in the previous calendar year.

- 17 In-Person Programs
  - 16 Fall 2023 vs. 15 Spring 2024
  - Does not include ALA since it is a rollover from 2023

- 20 Virtual Programs*
  - *Virtual programming includes Couch Chats which are currently TBD and counts the following as individual activities as any one registrant will attend that one program as a series – even though the program itself may be multi-day, or multi-week: ALA, CAE Study Group, CalCPA, and Alliance Learning Collective.

- Breakdown by Region
  - Bay Area = 2
  - Capital = 7
  - Oregon = 2
  - San Diego = 2
  - SoCal = 4

CalSAE 2023-2024 Education Plan

July
#	Su	M	Tu	W	Th	F	Sa
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	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
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March
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30						

Event Description

Date	Event
6-Jul-23	Maximize-Creating Association Partnerships That Work
14-Jul-23	Association Leadership Academy
11-Aug-23	Association Leadership Academy
13-Aug-23	AMC Retreat
14-Aug-23	AMC Retreat
18-Aug-23	Education Program- Capital
25-Aug-23	Speaker Showcase
31-Aug-23	CalCPA + CalSAE Symposium for Finance Leaders #1
14-Sep-23	CalCPA + CalSAE Symposium for Finance Leaders #2
7-Sep-23	Sac State Intern Orientation
13-Sep-23	Fall CAE Study Course (begins)
15-Sep-23	Association Leadership Academy
19-Sep-23	Maximize-New Member Orientation
27-Sep-23	Alliance Learning Collective #1
6-Oct-23	DEI Webinar #1: Setting the Foundation
11-Oct-23	Alliance Learning Collective #2
20-Oct-23	Associations 360
25-Oct-23	Alliance Learning Collective #3
27-Oct-23	Education Program-Oregon
9-Nov-23	Holiday Event Bay Area
16-Nov-23	Holiday Event San Diego
17-Nov-23	Holiday Event SoCal
1-Dec-23	DEI Webinar #2: Internal Focus – Engaging Staff and Volunteers
12-Dec-23	Seasonal Spectacular
13-Dec-23	Seasonal Spectacular
	Spring 2024 Programming Begins
19-Jan-24	Education Program-SoCal
31-Jan-24	Membership & Marketing Webinar
2-Feb-24	DEI Webinar #3: External Focus – Engaging Members
8-Feb-24	Maximize-New Member Orientation
14-Feb-24	Spring CAE Study Course (begins)
15-Feb-24	Education Program-Oregon
20-Feb-24	Insights Executive Summit
21-Feb-24	Insights Executive Summit
1-Mar-24	Women in Leadership
8-Mar-24	Education Program-Bay Area
13-Mar-24	The Business of Associations Webinar #1
29-Apr-24	ELEVATE
30-Apr-24	ELEVATE
1-May-24	ELEVATE
8-May-24	The Business of Associations Webinar #2
17-May-24	Education Program- Capital
12-Jun-24	The Business of Associations Webinar #3
21-Jun-24	Membership & Marketing Summit

Event Key

- Green - New Member Orientation
- Yellow - Virtual Offering
- Purple - Specialized In-Person Event
- Blue - In-person Education Program
- Orange - Signature Event

TBD: Couch Chats
TBD: Peer Luncheons

CalSAE ®
California Society of Association Executives