

ASSOCIATIONS West

Annual Report

2025/2026

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INTRODUCTION

About Us

Associations West is a nonprofit 501(c)6 membership organization advancing and fostering the educational and professional needs of the association community in California, Oregon, and Washington. We are the second largest local Society of Association Professionals in the nation with over 1,500 members. Since our founding in 2002 it has been our mission to advance the association profession through knowledge, valued relationships, and trusted resources.



Member Types

Association Professional members
The staff, including CEOs, directors, managers, and administrative personnel, of associations, non-profit organizations, or association management companies within trade, professional, technical, educational, or similar nonprofit organizations.

Industry Partner members
Suppliers of products and services to the associations industry including businesses such as hospitality and convention services, destination management organizations, finance, insurance, technology, marketing, consulting, and many more.

INTRODUCTION

Message From 2025/26 Board Chair - Megan Hemming



This past year was an exciting one for Associations West. We continued to build on the momentum of our rebrand, expand our community across the West, and create new opportunities for association professionals to connect, learn, and grow together.

One of the highlights of this year was completing our merger with the Washington Society for Association Excellence (WSAE). Bringing our organizations together was the result of thoughtful conversations, strong leadership, and a shared belief that we are stronger when we work together. As Associations West continues to grow, so do the opportunities for members to build relationships, share ideas, and learn from colleagues across the region.

The Board's work this year focused on two key Strategic Directions: Connecting & Empowering Community and Advancing Professional Excellence. We know that our greatest strength is our members, and we remain committed to creating opportunities for meaningful engagement, collaboration, and learning. Whether through our events, volunteer leadership opportunities, committees, regional programs, or online communities, we continue to see members sharing knowledge, supporting one another, and developing professionally together.

As we look ahead to the coming year, I am excited to continue serving as Board Chair and helping lead the next chapter of Associations West. We will continue strengthening connections across our expanded membership, investing in high-quality professional development, and creating opportunities that help association professionals and industry partners thrive.

Thank you for your engagement, leadership, and commitment to Associations West. I look forward to another year of working alongside this extraordinary community and all that we will accomplish together.

INTRODUCTION

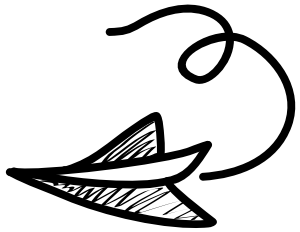
Message From President & CEO - Jim Anderson, CAE



What an exciting year for Associations West! We're thrilled to welcome our new members from Washington into the Associations West family, which seemed fortuitous as we implemented our new brand and name last year. The merger allowed us to expand both our network and our staffing, which will enable even more educational opportunities and resources for every member across the West.

The merger with Washington is one example of the changes we're making, including adopting a new Success Plan. Two areas of our Success Plan I'd like to highlight include Launching Innovative Solutions and Fueling Sustainable Growth.

Launching Innovative Solutions is a system we're building internally, and will bring a variety of ways to improve value for our members. For example, we made some significant changes to our ELEVATE Annual Conference this year — and the results speak for themselves. We set a new record for attendance and achieved our highest member satisfaction rating ever, nearing 4.6. And we're not slowing down: this year we're rolling out two brand-new summits, one designed for Emerging Professionals and another built specifically for Events and Education Professionals. There's more innovation on the way, so please stay tuned.



We've also built strategies around Fueling Sustainable Growth for long-term success. We made a strong contribution to our reserves last year, while also expanding sponsorship and engagement opportunities for our Industry Partners — big and small - whose support and partnership fuels everything we do. Our membership also continues to grow, increasing in seven of the last nine years, a testament to the value our community delivers.

I'm proud of what we've built together, and even more excited about what's ahead.

STAFF TEAM



Jim Anderson, CAE
President & CEO



Lindsay Poss, CMP
VP, Meetings & Events



Denize Maldonado
Director of Membership Engagement



Jamie Innamorato
Director of Marketing & Strategy



Jessica Barker, CAE
Director of Governance & Operations



Laura Stiles
Program & Events Manager



Deanna Vargas
Membership Recruitment Specialist



Megan Denhardt, CAE
Education Consultant



Dani Siver
Consultant, Oregon Region



Andrew Estep, CAE
Consultant, Washington Region

BOARD OF DIRECTORS



Megan Hemming
Chair



Chris Locke
Vice Chair & Secretary



Jenn Jones, CAE, MS, IOM
Treasurer



Anne Marie Mourhess, DES
Industry Partner Vice Chair



David Murillo
Immediate Past Chair



Amy Mrugalski
Director

BOARD OF DIRECTORS



Denise LeDuc Froemming, CAE, CPA
Director



John Hooley
Director



Kwedi Moore, CAE
Director



Michele Ware, CAE
Director



Shaun Rundle, CAE
Director



Sheila Johnston, MPPA
Director

REGIONAL COUNCIL LEADERSHIP



Sue Reimbold, MA, CAE
Bay Area Regional Council Chair



Jordan Yelinek, QAS, CAE
Bay Area Regional Council Vice-Chair



Cher Ekasala, CAE
Capital Region Chair



Erin Smith
Capital Region Vice-Chair



Kristen Davies, CAE
Oregon Region Chair



Brandon Lawrence, CAE
Oregon Region Vice-Chair



Troy Peters, CTS
SoCal Region Chair



Michelle Palmer, MBA
San Diego Region Vice- Chair

Note that the WA Regional Council was not formed until June 2026

COMMITTEE LEADERSHIP



John Hooley
Audit Chair



Stephanie Stephens, CAE
Awards Chair



Kirsten Machi, CMP
Awards Vice-Chair



Touda Bentatou
Communications Chair



Megan Whitbeck
Communications Vice-Chair



Lauren Oakley
DEI Co-Chair & Elevate Annual Conference Vice Co-Chair (Steak)



Teresa Excinia, MBA, CAE
DEI Co-Chair



Cher Ekasala, CAE
Elevate Annual Conference Co-Chair (Sizzle)



Rachel Selwan
Elevate Annual Conference Co-Chair (Steak)



Monique Frankfort
Elevate Annual Conference Vice Co-Chair (Sizzle)



David Murillo, CAE, IOM
Leadership Development Chair

COMMITTEE LEADERSHIP



Stephanie Stephens, CAE
Leadership Development Chair



Megan MacNee, CAE, MPA
Legislative Advisory Work Group Chair



Desmond Brown
Membership Advisory Group Chair



Anabel Martinez, MBA, PMP
Membership Advisory Group Vice-Chair



Melanee Cottrill, MBA, CAE
Professional Development Chair



Amy Mrugalski, CAE
Professional Development Co-Chair



Jenna Bailey
Seasonal Spectacular Co-Chair (AP)



Jeff Dougherty
Seasonal Spectacular Co-Chair (IP)



Elizabeth Cardwell, CAE, CMP
Seasonal Spectacular Vice Co-Chair (AP)



Shelbi Quintana
Seasonal Spectacular Vice Co-Chair (IP)

PREMIER PARTNERS

Thank You to our Premier Partners for Making our Mission Possible!

GOCAL GREATER ONTARIO CALIFORNIA

Platinum

COLUMBIA BANK

Platinum

novi AMS

Gold

visit greater palm springs

Gold

MONTEREY MEETINGS

ALL INSPIRED

Silver

VISIT SAN JOSÉ CALIFORNIA

Silver

THE SAN FRANCISCO Peninsula

SOUTH OF SAN FRANCISCO · NORTH OF EXPECTATIONS

Silver

SUCCESS PLAN

WHY: Guiding Principles

Based on Prior Plans

- Provide Member Value
- Trusted Source to Expand Thinking and Avoid Blind Spots
- Build Future Leaders
- Maintain Economic Stability
- Adapt to increased competition & disruption

HOW: Practical Vision

What will be in place as a result of our actions?

- Engaging Peer Connections
- Vibrant Western Community
- Inclusive Equitable Access
- Remarkable New Member Experience
- Scaling Internal Capacity
- Dynamic Learning Opportunities
- Leading Bold Innovation

HOW: Strategic Directions

What innovative substantial actions will overcome the identified blocks to achieve our Vision?

- **Connecting & Empowering Community**
- **Fueling Sustainable Growth**
- **Launching Innovative Solutions**

WHAT: First Year Accomplishments

(Goals) Quantitative

QuarterlyOnline Town Halls	Roll out NPS [NOVI]	NEVADA Analysis, Goals, Plan for Year	Increase Premier Partner Revenue 15%	Develop Innovation Process	Identify Innovation Priorities for: **Membership**
Craft Remarkable New Member Experience	Event Data Deeper Dive - WHY not returning?	New Brand Implementation	Hire Part-time staff in September	Assess Success of Innovation at Events	Identify Innovation Priorities for: **Marketing**
Develop SIG Plan	Peer Facilitated Couch Chats	Meet/Exceed Membership Renewal Goals	Create Plan to reach full revenues goals (6 mos. operating)	Identify Priorities for Marketing/ Sponsorship	Identify Innovation Priorities for: **Events**
Explore other Regions for Events	Create "micro volunteer" options				

WHAT: Measurements

From Focused Implementation Workshop with Staff

Retention Rate: 86% for Assoc.' 78% IPs	NPS score: 76%	Higher Retention Rate: APs 86%; IPs 73%	Add / retain new membership staff person	Increased attendance and satisfaction	**From Existing Plan**	TOTAL Association Members	TOTAL Industry Partner Members	Seasonal Net Profit
% of hashtags (#) from events	Measure ability to connect from post-event surveys	Meet/ Exceed annual savings goal				Volunteer Satisfaction: Net Promoter Score	Member Satisfaction: DEI	Elevate Net Profit
						Seasonal= Association Attendance	Seasonal Exhibitor Satisfaction	Assoc. West Budget / Net Profit

SUCCESS PLAN UPDATE

Connecting & Empowering Community

Objective 1: Roll out member net promoter score (NPS)

- Achieved goal of NPS of 76

Objective 2: Implement Virtual Peer Conversation Series

- Hosted 6 AW Asks virtual events covering a variety of topics of interest to membership; reached 185 members

Objective 3: Hold Town Halls Regarding Washington Merger

- Hosted 1 in-person and 2 virtual town halls

SUCCESS PLAN UPDATE

Fueling Sustainable Growth

Objective 1: Implement New Brand

- Brand implementation has been completed. Highlights include new brand guide, new mission statement, updated major event logos, stronger member value proposition, and updated website theme.

Objective 2: Expand Services to Washington

- The merger between WSAE and AW was successfully completed on March 1, 2026. Washington Regional Council has been established and there is a Washington member serving on the Board of Directors. Andrew Estep has been hired as the Washington consultant.

Objective 3: Increase Premier Partner Revenue by 15%

- This goal was achieved, with Premier Partner Revenue totaling $147,500 compared to $123,750 in 2024-2025.

SUCCESS PLAN UPDATE

Fueling Sustainable Growth (cont.)

Objective 4: Hire Part-Time Membership Staff

- Recruitment Specialist Deanna Vargas joined the team in October.

Objective 5: Meet Membership Goals

- Associations West's membership goals for the 2025-2026 year were extremely ambitious. We ended the year at 98% of our membership revenue goal overall.

Objective 6: Strengthen Financial Assets

- We substantially exceeded our net revenue goal, and will contribute nearly $100,000 to reserves.

SUCCESS PLAN UPDATE

Launching Innovative Solutions

Objective 1: Develop Innovation Process

- The staff team received training from an innovation consultant and will be working on process development next year.

Objective 2: Infuse Innovation at Seasonal Spectacular 2025

- Implemented several new elements, including the Toast & Tinsel Exchange reception, discounted tiered pricing for multiple association registrants, and adopting eShow for exhibitor registration.

Objective 3: Infuse Innovation at Elevate Annual Conference 2026

- Attendees were enthused about the new community building elements: dine arounds dinners and mid-conference activities. Plus Elevate got a refresh to the logo and branding.

MEMBERSHIP









1,624 Members

- 25% Managers
- 19% Directors
- 20% Coordinators /Assistants
- 19% Meetings/ Events/Ed
- 20% Operations /Finance
- 28% CEOs
- 34% Membership /Marketing
- 487 New Members
- 450 Industry Partners
- 1,174 Association Prof.
- 36% Senior Staff

REGIONS

Regional Councils

Regional Councils are a group of volunteers who aid in planning their local Associations West education, networking, and social events. Council members also act as liaisons for new members - helping them get connected and make the most out of their membership.

Mission Statement
To ensure member engagement and growth at the local level.

Responsibilities

1. Membership recruitment and engagement.
2. Networking development and enhancing local events.
3. Enriching peer and individual relationships.

Bay Area Region



Encompasses the metropolitan area around San Francisco, including Oakland, San Jose, and its surrounding areas, and extends to Monterey, Sonoma County, and San Joaquin County.

The Bay Area makes up 15% of Associations West's membership.

Capital Region



Centers around the state capital, Sacramento, and includes neighboring cities and everything north of it, up to the California-Oregon Border.

The Capital region is the largest Associations West region, making up 45% of the membership.

REGIONS

Oregon Region



The Oregon region joined Associations West in 2022. It covers the entire state of Oregon with many of its members centered in the Portland-Salem Area.

Oregon makes up 5% of Associations West's membership.

SoCal Region



The SoCal region spans from Bakersfield through the greater Los Angeles area and Inland Empire, extending south through Orange County to San Diego.

The SoCal region is Associations West's second largest region, making up 20% of its membership.

Washington Region



Washington is the newest region, joining Associations West in 2026. It covers the entire state of Washington with many of its members centered in the Seattle Area.

Washington makes up 13% of Associations West's membership.

COMMITTEES

Communications
To support and amplify the Success Plan goals by nurturing ongoing endeavors while also cultivating inventive concepts to facilitate interaction among members via organizational communication platforms.

Diversity, Equity, and Inclusion (DEI)
The DEI Committee fosters diversity, equity, and inclusion (DEI) in Associations West and the association community. The focus is on: encouraging broader adoption of DEI practices within associations. strengthening our own DEI culture and regularly evaluating and refining Associations West's DEI plan with the Board.

ELEVATE Annual Conference
The committee handles location selection, concept/theme design, sponsorship solicitation, attendance, assistance with programming, and volunteer on-site. Committee members put the "steak" (education) and "sizzle" (experience) into this springtime, multi-day education and relationship-building event.

Legislative Advisory Work Group (LAW Group)
The purpose of the law group centers on two primary themes: 1. producing professional development content and resources for members, and 2. a peer discussion group to get advice, exchange ideas on advocacy strategy and compare advocacy trends and practices.

Membership Advisory Group (MAG)
Assess staff recommendations and provide best practices for member recruitment, retention, and engagement. The MAG oversees Associations West's membership recruitment and retention plan, develops Board recommendations for membership dues, and coordinates with regional councils on member engagement strategies.

Professional Development (PDC)
Responsible for understanding the educational needs of the membership, and providing high-quality education and training opportunities. They develop and implement the overall education plan, in coordination with regional councils and event committees.

Seasonal Spectacular
The committee will generate booth sales, solicit for attendance, determine concept/theme design, assist with the overall logistics of the event, and manage volunteer duties on-site.

MEMBER ENGAGEMENT



67 Regional Council Volunteers

175 Year-round Volunteers

186 Committee Volunteers



24 In-Person Events

7 New Programs

15 Virtual Events

52 Total Events

92 CAE Credit Hours

6 Socials

MEMBER ENGAGEMENT

175

year-round volunteers

Aaron Smith
Alan Pentico
Amanda Hansen
Amanda Parsons
Amanda Rae Smith
Amy Mrugalski
Amy Lai
Amy Morrisey
Anabel Martinez
Andrea Elliott
Anne Gamino
Anne Marie Mourhess
Autumn Heacox
Barry Taylor
Benita Blessing
Betti Phillips
Beverly (Bev) Hoeft
Brandon Lawrence
Brian Dobbs
Camron King
Cassandra Strawn
Catherine Smith
Chanel Ilagan
Chelsea Jones
Cher Ekasala
Chris Nuccio
Chris Locke
Christine Russo Robertson
Christine Feenstra
Christine Bohlke
Cindy Holcomb
Cristi Harris
Crystelle Turlo
Cynthia Jimenez
Danelle Buckley
Danielle Fournier
Danielle Fayette
David Stone
David Murillo
Deb Sanders
Denice Hinden
Denise LeDuc Froemming
Desmond Brown
Drusilla Flores
Edwin Abarca
Elizabeth Cardwell
Eric Geedey
Erica Farr
Erin Smith
Ernesto Alonzo
Estrella Ramirez
Eva DuPont
Fabian Bon
Fatima Jones
Ferdinand Castro
Gary Murakami
Greg Wilson
Gregory Heinze
Gretchen Baldwin
Heather Starkey
Hillary Burton
James DeLizia
Janet Waldie
Jeff Dougherty
Jeff Milde
Jenn Jones
Jenna Bailey
Jennifer Poff
Jennifer Carlson
Jennifer Johnson
Jennifer Flohr
Jennifer San Juan
Jinnie Tam
Jodie Muller
John Hooley
Jordan Yelinek
Jovan Samonte
Julie Shkolnik
Kali Mendiola
Karalee Adams
Karl Baur
Karl Palachuk
Kathie Giles
Katie Hinks
Katrina Duncan
Kellie Schroeder
Kendra Braunwalder
Kim Gusman
Kirsten Machi
Kristen Davies
Kristen Gleason
Kristin Hynes
Kristine Tsusaki-Reddick
Kristy Olk
Krystinne Mica
Kwedi Moore
Laura Campi
Laura Calderon Rivera
Laura Fitzgerald
Laurel Nava
Lauren Oakley
Lauren Siring
Lillian Camp
Lindsey Lee
Lydia Guerra
Lynne Freeley
Maggi Vandenburg
Maggie Thyken Huss
Marcus Byrd
Maria Dempsey
Marilyn Atchue-Zuill
Mark Bertler
Marques Davison
Megan Wilson
Megan MacNee
Megan Hemming
Meghan Whitbeck
Melanee Cottrill
Melissa Walling
Michele Ware
Michelle Palmer
Michelle Flippo
Micheyl Barnett
Monique Frankfort
Myra Howay
Natalie Jimenez
Nicole Llido
Nicole Hankton
Nina Buthee
Pam Pietrok
Patricia Zollman
Rachel Selwan
Rachel Hickerson
Raven Tahara
Renee Hauger
Roxana Humphreys
Sandy Bartu
Sandy Brown
Sarah Erck
Scarlett Vanyi
Scott Dilley
Scott Oser
Shannan Young
Shaun Rundle
Sheila Johnston
Shelbi Quintana
Sherrie Bakke
Spartacus Avina
Stacey San Pedro
Stacy Pollicino
Stephanie Pridmore
Stephanie Stephens
Stephanie Goldman
Stephanie Flores
Steven Garner
Sue Reimbold
Tara Da Re
Tariq Bruno
Teng Lorenzo
Teresa Excinia
Threasa Hernandez
Tiffany Creswell
Tonya Burns
Tori Westergart
Touda Bentatou
Tricia Brazil
Troy Peters
Vanessa Dennison
Veronica Segovia
William Smith

ACHIEVEMENT AWARDS



Association Executive of the Year

Cher Ekasala, CAE

Compass Management Solutions



GHM Staff Achievement Award

Kali Mendiola

BOMA Silicon Valley



Industry Partner of the Year

Anne Marie Mourhess

Visit Greater Palm Springs

ACHIEVEMENT AWARDS

NEW!

The awards committee worked to expand our awards program to be more inclusive of our emerging professional members with the addition of the new Rising Star category for both associaiton professionals and industry partners.



Rising Star Association Professional Award

Rachel Selwan, CAE

New Level Mgmt.



Rising Star Industry Partner Award

Maggie Thyken Huss

Visit Rancho Cordova

PROGRAMS & EVENTS



Elevate Annual Conference

Elevate is where association colleagues and industry partners come together for four exciting days of networking, learning, and face-to-face connections. This year in Newport Beach was a success in many ways including achieving a record high Elevate attendance of 366!



Seasonal Spectacular

The premier networking event for the association community on the West Coast including a tradeshow, focused business solution appointments, and education programs, all in the spirit of the holiday season. 2025 had a record high association professional attendance of 569 and a high exhibitor satisfaction score of 4.43!



Membership & Marketing Summit

A full-day immersive exploration of emerging ideas, industry trends and leading best practices. This year we had a packed house again tested out a new peer solution crowdsourcing session.

Signature Events

PROGRAMS & EVENTS



AMC Retreat

We recognize that the structure and organizational needs of an Association Management Company (AMC) are unique and complex. This annual retreat is designed for owners to gather for peer-to-peer education, discussion, and networking in an intimate group setting.



Ascend Leadership Academy

Targeted at mid-level leaders within the association profession looking to advance their careers. Through a combination of in-person and virtual accountability groups, this intimate experience transpires across a few months.



Virtual CAE Study Group

For members who are ready to take the next big step in their association leadership journey. Our highly acclaimed peer-driven study group aids particpants in preparing for the exam, complete with test tips and mentor.

Specialty Events

PROGRAMS & EVENTS



Insights Executive Summit

Specifically for advanced-level CEOs, this a two-day immersive program with high-level content designed to offer a unique blend of education and networking opportunities. This year's theme was Adaptive Leadership in an Era of Transformation.



Ladies Who Lead

Geared towards women in the association industry to create a space to discuss topics that impact them and learn from one another. This year we gathered at the woman-owned Prickly Pear to cultivate leadership resilience and champion one and other. The day concluded with a lovely succulent potting social.



Regional Summits

Summits designed to bring together bold thinkers and expert practitioners to help association professionals move from status quo to breakthrough—across leadership, culture, learning, and technology. We gathered to build momentum, confidence, and community.

Specialty Events

PROGRAMS & EVENTS



MAXIMIZE Your Membership

For those new to Associations West or just in need of a refresh? Get a deep dive into Associations West and all of our membership benefits and offerings. Learn how you can take advantage of our tools and offerings to advance both personally and professionally.



Peer-to-Peer Social Learning

Offered on the regional level, these are informal discussions to exchange ideas and industry information directly with colleagues. Examples include Peer Luncheons by function area, Coffee & Connect, and more.

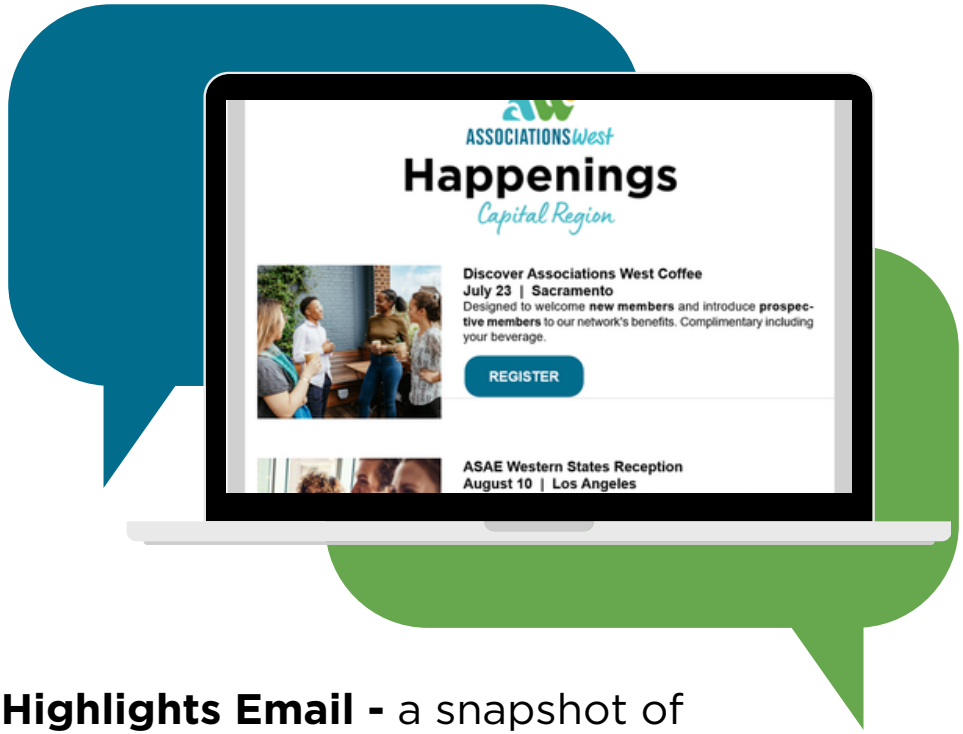


Virtual Learning

A variety of live webinars were produced by Associations West throughout the year including our Couch Chat series based on functional roles, Speaker Showcase, CAE Info Session, Facilitation Skills Lab, Legal Webinar and more.

Specialty Events

COMMUNICATIONS

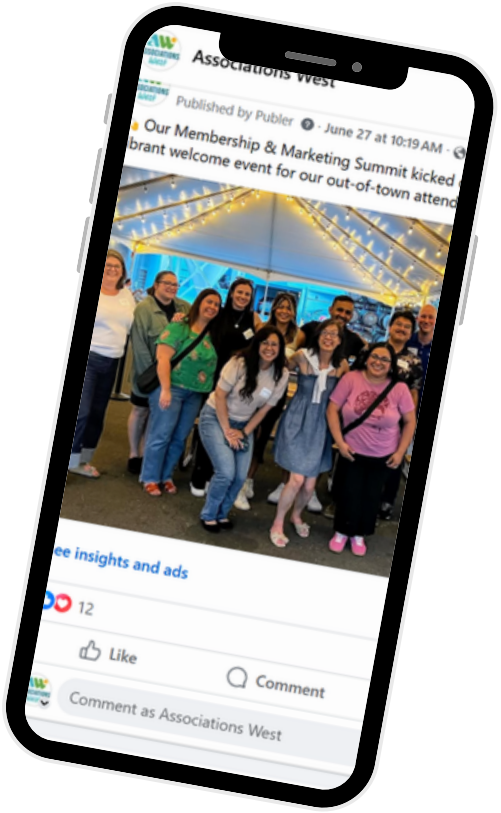


Highlights Email - a snapshot of updates & news just for members

Happenings Email - a snapshot of upcoming events in your region sent out every other week.

Update eNews - AI-powered industry news with articles curated just for you! The more you click, the more future content will become relevant and personalized.

follow along and tag us
@associationswest



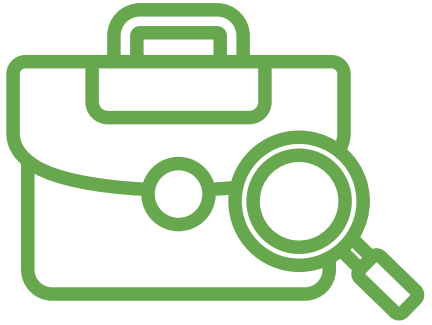
MEMBER RESOURCES



Knowledge Hub



Update Industry News



Career Center



AW Connect Online Community



Industry Partner Business Directory



CAE credential Support QAS Certificate

FINANCIAL

ESTIMATE - Balance Sheet at June 30, 2026	
Assets	
Checking account	$259,168
Certificates of Deposit	$492,919
Other Assets	$181,639
Fixed Assets	$25,880
Less Accumulated Depreciation	($18,348)
Right-to-use asset (lease)	$132,027
Total Assets	**$1,073,286**
Liabilities	
Accounts Payable	$15,575
Vacation Liability	$42,609
Deferred Income (26/27 pre-paid dues)	$108,628
Other deferred income (events/sponsors)	$199,082
Lease Liability	$136,213
Other Liabilities	$3,228
Total Liabilities	**$505,334**
Equity	
Reserves - beginning of year	$420,328
Washington Reserves (restricted)	$50,000
Net Revenue/Budget Surplus	$97,623
Total Equity	**$567,951**
Total Liabilities and Equity	**$1,073,286**

2025/26 Budget (actuals, pre-Review) Activity Statement	
Revenue	
Dues - Association Professionals	$203,761
Dues - Industry Partners	$149,075
ELEVATE Conference	$427,708
Seasonal Specacular	$609,277
Specialty Meetings	$128,039
Marketing and Products	$323,193
Washington Asset Transfer (net)	89,393.55
Subotal Revenue	**$1,930,447**
In-Kind Support*	**$638,122**
Total Support	**$2,568,569**
*In-kind support is non-monetary transactions that are donated to AW or involve an exchange of services.	
Expenses	
Administration (merchant fees, insurance, professional services, etc.)	$116,764
Housing & Office Expenses	$47,835
Personnel Expenses & Volunteerism	$69,729
Technology	$33,060
Human Resources	$1,064,374
Seasonal Spectacular	$230,159
ELEVATE Conference	$190,178
Specialty Meetings	$80,725
Subtotal Expenses	**$1,832,824**
In-Kind Support	**$638,122**
Total Expenses	**$2,470,946**
Net Revenue	**$97,623**