



CalSAE →
California Society of Association Executives™



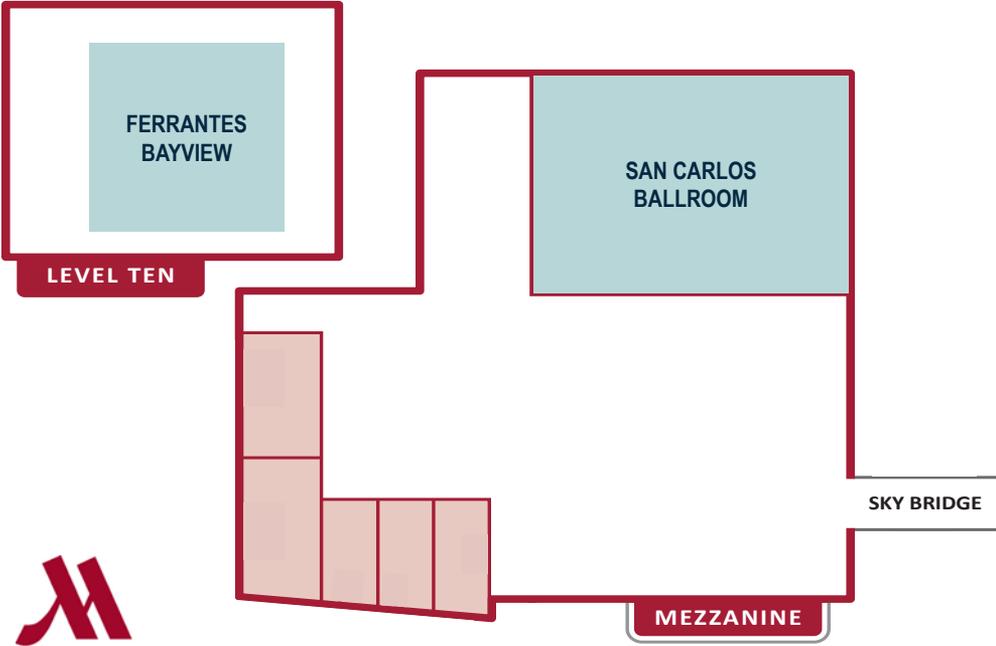
ELEVATE

2025 ANNUAL CONFERENCE

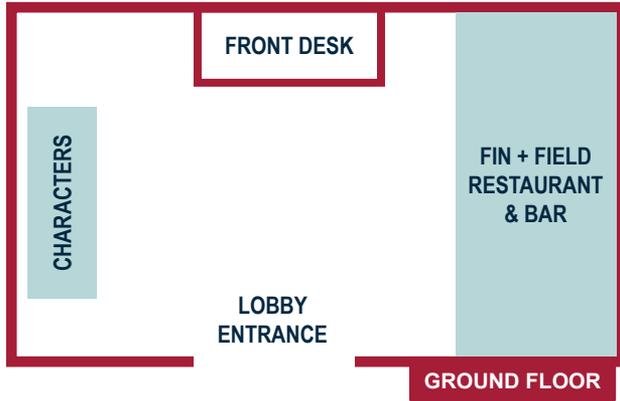
April 6-9, 2025 | Monterey, CA
Monterey Conference Center | Monterey Marriott



MONTEREY MARRIOTT



MARRIOTT
MONTEREY



Wi-Fi

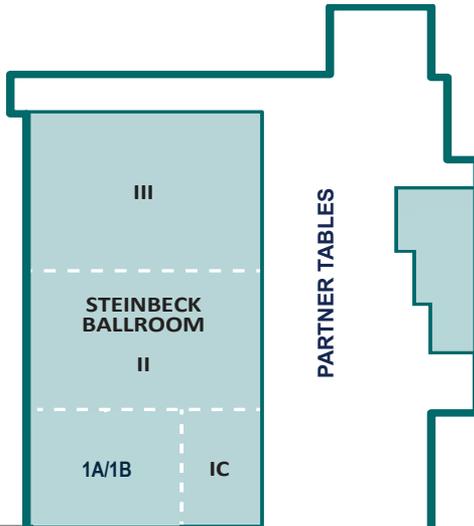
Network: **MontereyBonvoy_Conference**

Password: **ELEVATE!**

MONTEREY CONFERENCE CENTER



MONTEREY
CONFERENCE CENTER



SKY BRIDGE

QUIET
COVE

STEVENSON
TERRACE

REGISTRATION

LEVEL TWO

Quiet Cove

Decompression Space
this is a quiet zone,
no electronics. Open Daily.

Featuring Chair Massages

Mon 1:45 - 2:45 pm

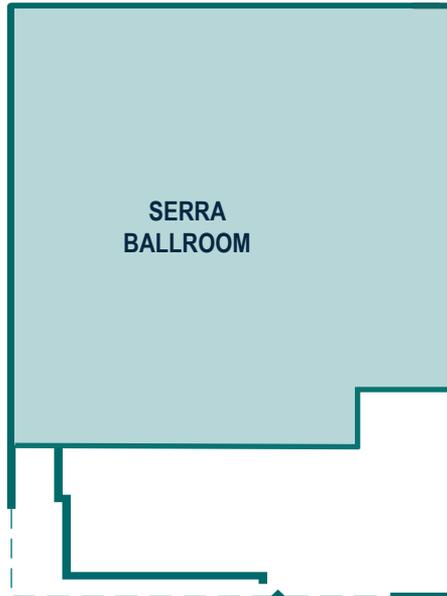
Tues 2:15 - 3:15 pm

(first come, first served)



Wi-Fi

Network: **Monterey**
Password: **ELEVATE!**



LEVEL ONE

MCC ENTRANCE

Remember, the best connections happen when you're having fun! So, smile, explore, and don't be shy about introducing yourself — you never know what new friend or opportunity might be just around the corner!



ELEVATE Co-Chair
Sarah Erck, CMP

Director of Conference and Events
California Veterinary Medical Association

ELEVATE
2025 ANNUAL
CONFERENCE

“Engage, learn, and connect. Every conversation is a chance to grow. And most importantly, have fun!”



ELEVATE Co-Chair
Karalee Adams

Sales Manager, Visit Pasadena

IN YOUR PROGRAM

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ELEVATE VOLUNTEERS

Reference the volunteer sheet here to recall details of what you signed up for! Scan or visit: bit.ly/e25-volunteers

WHAT'S YOUR PLAN?

Make getting from room to room easier during break-out sessions. Choose the sessions you'll be attending, then fill in the room name below for easy reference close to the conference map!

Monday

First-Timers/Solo Attendees Meet & Greet

9:00 - 9:45 am room Steinbeck 3

Concurrent Learning Sessions

1:00 - 2:00 pm room _____

2:30 - 3:30 pm room _____

3:45 - 4:45 pm room _____

Tuesday

MAXIMIZE Your Membership

8:00 - 9:00 am room Steinbeck 1A/1B

Concurrent Learning Sessions

10:30 - 11:30 am room _____

1:30 - 2:30 pm room _____

3:00 - 4:00 pm room _____

4:15 - 5:00 pm room _____

Wednesday

Coffee & Conversation-CAE Curious?

8:45 - 9:15 am room Steinbeck 1C

Concurrent Learning Sessions

9:30 - 10:30 am room _____

11:00 am - 12:00 pm room _____

SCHEDULE OF EVENTS



Learning Session descriptions can be found directly after each day's schedule.



Scan for digital/downloadable handouts or go to www.calsae.org/elevate-handouts



Denotes **3 ELEVATE speakers in the Silent Auction**. Score a deal by bidding on their services and bring them to your own organization. See page 27 for more info.

SUNDAY APRIL 6

PRECONFERENCE ACTIVITIES

Marriott Lobby - meet at the time below to walk/carpool over together

Whale of a Time - 11:15 am

Hit the Court - Pickleball - 12:30 pm

Meritage Mission Impossible - 12:30 pm - *Sponsored by re:Members*

4:00 - 6:00 PM REGISTRATION

Marriott Lobby - *Welcome Treats Sponsored by HelmsBriscoe*

4:00 - 6:00 PM WELCOME HAPPY HOUR

Fin + Field Bar (Marriott) *Sponsored by VIP Audio Visual Company*

Stop by for some mingling, live music, and appetizers. No-host bar.

6:00 PM DINNER IS ON YOUR OWN

Check out what there is to eat, drink, and do around Monterey (many within walking distance from the hotel)! Scan to download your ELEVATE HipMaps App, then enter access code: ELEVATE25



MONDAY APRIL 7

7:00 - 8:00 AM SUNRISE ENERGIZER ACTIVITIES

See page 34 for each day's options, time, and location.

8:30 AM REGISTRATION OPENS

Stevenson 1 - *Welcome Treats Sponsored by HelmsBriscoe*

9:00 - 10:00 AM CONTINENTAL BREAKFAST

Serra Ballroom - *Sponsored by Marin Convention & Visitors Bureau*

9:00 - 9:45 AM FIRST-TIMERS/SOLO ATTENDEE MEET & GREET

Steinbeck 3 - *Sponsored by Dennison & Associates*

Breakfast will be provided in the room

10:00 - 11:30 AM KEYNOTE & AWARDS CEREMONY

Serra Ballroom - *Sponsored by Beacon Tech Research*

UNLOCKING TEAM GENIUS

Joe Gerstandt, Freedom Fighter. Freak-flag Flier.

11:45 AM - 12:45 PM VOLUNTEER RECOGNITION LUNCHEON

San Carlos Ballroom (Marriott) - *Sponsored by Discover Santa Clara*

1:00 - 2:00 PM CONCURRENT LEARNING SESSIONS

AUTOMATE THE MUNDANE TO UNLEASH YOUR CREATIVE POTENTIAL

Steinbeck 1C

COCKTAIL NAPKIN NETWORKING: MAKE MEANINGFUL CONNECTIONS ANYWHERE, ANYTIME, WITH ANYONE

Steinbeck 2

▶ THE TO-DO LIST SOLUTION: MASTERING PRODUCTIVITY

Steinbeck 1A/1B

WHAT CONSTITUTES A REMARKABLE ASSOCIATION TODAY: RETHINKING THE SEVEN MEASURES

Steinbeck 3

2:00 - 2:30 PM NETWORKING & SNACK BREAK

Steinbeck Lobby - *Sponsored by GES*

2:30 - 3:30 PM CONCURRENT LEARNING SESSIONS

ASK THE ASSOCIATION ATTORNEY: EVERYTHING YOU WANT TO KNOW - Steinbeck 3

FROM COEXISTING TO CO-CREATING: UNLOCKING THE EXPONENTIAL POWER OF PARTNERSHIPS

Steinbeck 1A/1B

TRANSFORMING TEAM MEETINGS: FROM MUNDANE TO MUST-ATTEND

Steinbeck 2

WHAT A NEW PAIR OF SNEAKERS REVEALED ABOUT INCLUSION

Steinbeck 1C

3:45 - 4:45 PM CONCURRENT LEARNING SESSIONS

ETHICS LIVE! ROLEPLAY AND PRACTICE IN RESPONDING TO REAL VIOLATIONS

Steinbeck 1C

THE ROAD AHEAD: INNOVATING & TRANSFORMING ASSOCIATION BUSINESS MODELS FOR LONG-TERM SUCCESS

Steinbeck 3

PEER MENTORING FOR ENGAGEMENT AND RETENTION: STRENGTHENING ASSOCIATION COMMUNITIES

Steinbeck 1A/1B

MASTERING THE ART OF EXECUTIVE PRESENCE

Steinbeck 2

5:45 PM FIRST-TIMERS/SOLO ATTENDEE GATHERING

Fin + Field Bar (Marriott)

6:15 PM LOAD SHUTTLE FOR PARTY WITH THE PARTNERS

Meet in Marriott Lobby - Exclusively for Association Professionals and Conference Partners, **wear your name badge for admittance**. See next page for more details.

6:15 - 8:45 PM CHEERS WITH PEERS

Dust Bowl Brewing Company (walking distance) - For Industry Partners not attending Party with The Partners. Appetizers provided, no host bar.

6:30 - 8:30 PM PARTY WITH THE PARTNERS

Experience the aquarium in a whole new way - after dark with exclusive after hours access. Dine and delight the night away with a strolling culinary adventure through the deep sea, splash to the DJ's beats, and dive into a world of wonder through an array of special experiences. Shuttles will start return trips to the hotel beginning at 8:30 pm. **Be sure to wear your badge for admittance.**



MONDAY LEARNING SESSIONS

10:00 - 11:30 am Keynote

Unlocking Team Genius

Talent is highly valued in every association, but are we focusing on the right aspects to truly maximize it? In today's collaborative environment, much of our success depends on the effectiveness of teams—yet many talent strategies still prioritize individuals over group dynamics. Simply assembling skilled individuals doesn't automatically create high-performing teams. This keynote provides research-driven insights applicable to all association professionals, regardless of role or experience. Discover how to elevate team performance by fostering cognitive diversity and cultivating psychological safety, essential ingredients for innovation and trust.

Joe Gerstandt, Freedom Fighter. Freak-flag Flier. Author, Social Gravity: Harnessing the Natural Laws of Relationships

1:00 - 2:00 pm Concurrent Learning Sessions

Automate the Mundane to Unleash Your Creative Potential

Is your team bogged down by repetitive tasks, leaving little time for innovation? Join us to discover how AI and automation can be your secret weapon in banishing busywork and igniting creativity! Explore practical ways to automate routine processes, freeing up your team to focus on what they do best - thinking strategically and delivering exceptional value to members.

Through interactive discussions and relatable case studies, you'll leave equipped with an action plan to leverage AI in transforming tedious tasks into opportunities for innovation. Get ready to reimagine your association's potential and empower your team to do their most impactful work!

Joseph Burak, MBA, AI Strategist, TRANSIT Strategy & Analytics

Cocktail Napkin Networking: Make Meaningful Connections Anywhere, Anytime, with Anyone

Get ready to revolutionize the way you network! In this dynamic program, discover a fun and effective approach to introducing yourself, making lasting impressions, and keeping the energy alive for future collaborations. This energizing, interactive session promises to turn every networking opportunity into a chance to connect authentically, highlight your gifts and talents, and leave a memorable mark well after the event has concluded. Join us for an engaging and informative session that promises to transform your networking approach, equipping you with the skills you need to create true connections.

Theresa Rose, Strategic Co-Creator and Award-winning Author, Theresa Rose Presents, LLC

The To-Do List Solution: Mastering Productivity

If your to-do list feels endless, and you struggle to prioritize or find a starting point, this one-hour workshop is for you. Discover the three common mistakes that undermine productivity and learn a simple, brain-science-backed, three-step framework to transform how you work. This session goes beyond theory, guiding you to implement these strategies on the spot, helping you shift from constantly putting out fires to focusing on what truly matters. You will leave equipped with tools to work smarter, not harder. HOMEWORK! To maximize your experience, please bring your own to-do list in order to apply these valueable techniques in real time. The workshop concludes with an interactive Q&A, ensuring you leave with personalized insights to supercharge your productivity.

Alegre Ramos, MBA, DTM, LEED AP, Bestselling author, Podcast Host, and co-Founder, BYWD

What Constitutes a Remarkable Association Today: Rethinking the Seven Measures

In 2024, ASAE announced a national movement to reevaluate *The Seven Measures of Success: What Remarkable Associations Do That Others Don't*, the iconic guidebook inspired by Jim Collins and published in 2006. Discover what sets remarkable associations apart in this engaging session. Explore the seven measures of success that define high-performing organizations and evaluate their own associations through a self-assessment. Engage in thought-provoking discussions as fellow attendees share their perspectives on the evolving benchmarks for success in today's association landscape. Whether you're looking for actionable insights or inspiration, this session provides practical tools and fresh perspectives to elevate your organization's impact and performance.

Shaun Rundle, CAE, Executive Director, California Peace Officers Association

Shannan Young, RDN, SNS, Partnerships and Programs Officer, Dairy Council of California

2:30 - 3:30 pm Concurrent Learning Sessions

Ask the Association Attorney: Everything You Want to Know

From one of the country's most experienced and notable association attorneys, come armed with your questions as we explore the most pressing legal issues facing trade and professional association these days. In a Q&A-driven format, this is your opportunity to ask our speaker about any association legal topic on your mind. Explore some of the hottest topics and legal risks creating buzz in the association community. In plain English and a very interactive format, learn the key red flags you need to be able to spot, what you should do when you spot them, and practical tips and suggestions for protecting your association and mitigating legal risk.

Jeffrey S. Tenenbaum, Esq., Managing Partner, Tenenbaum Law Group PLLC

From Coexisting to Co-Creating: Unlocking the Exponential Power of Partnerships

In an era of shrinking budgets and rising demands, success lies in building exponential relationships that amplify resources and unlock new possibilities. This interactive session introduces the concept of moving beyond competition and coexistence to create co-creative partnerships that deliver transformational results. Through engaging storytelling and reflective exercises, participants will explore practical strategies to identify and nurture high-impact connections within and beyond their organizations. By focusing on the "who" rather than the "how," attendees will learn how to expand their team's capacity, bridge silos, and foster trust, creativity, and collaboration. Walk away with actionable insights to energize your team, inspire innovation, and tackle challenges with renewed confidence.

Chris Failla, Founder and Lead Facilitator, See the Human, LLC

Transforming Team Meetings: From Mundane to Must-Attend

How often do we hold a team meeting, just because it's a standing meeting, or we feel we need one? Discover the art of turning your team meetings into compelling and highly productive gatherings. In this session, we delve into the world of facilitation skills, providing you with the tools and techniques needed to revitalize your meetings. Learn how to captivate your team's attention, ensuring active participation and genuine enthusiasm; and walk away from your meetings with decisions made. Explore proven strategies for problem-solving and decision-making within the meeting room, making every session an opportunity to drive actionable results. Join us and revolutionize the way you lead and participate in team meetings for improved collaboration, creativity, and productivity.

Megan MacNee, CAE, MPA, Senior Association Executive, Advocacy & Management Group

What a New Pair of Sneakers Revealed About Inclusion

It was a simple unexpected line, in fact a p.s., in an email about my new custom Nike Air Force 1's that widened my view on inclusivity. Granted, it also fueled the return of my sneaker obsession, but that's another story. When you create welcoming spaces for people of all backgrounds and abilities, it can lead to more productivity, creativity and innovation. People are likely to be more engaged and collaborative. It can expand your talent pool for hiring or reveal hidden talents among existing staff. At the end of the day, inclusion is the gateway to diversity and equity where more people can reach their full potential and make your association stronger. How are you modeling inclusivity? How is your association or your association events demonstrating belonging and welcoming. Let's explore ways to walk the walk and not just talk the talk about inclusion, diversity and equity.

Sonya Bradley, Chief Inclusion and Community Engagement Officer, Visit Sacramento

3:45 - 4:45 pm Concurrent Learning Sessions

Ethics Live! Roleplay and Practice in Responding to Real Violations

Responding to reports of an ethics violation can be challenging for the association professional. Many factors influence how organizations approach these reported violations, including association size, culture, governance structure, and established policies. Developing skills to navigate these factors and effectively handle reported violations is crucial for association leaders. We will go through a guided, interactive case evaluation of reported ethics violations and a discussion of best practices. Various-sized organizations will provide diverse perspectives on handling these challenging cases. Gain insights on analyzing reported violations within an established decision matrix and code of ethics, critiquing the process and policies, and applying sound ethical principles in these situations.

Eileen Murray, MM, CAE, CEO, American Epilepsy Society

Shawna Strickland, PhD, CAE, Associate Executive Director, American Epilepsy Society

Peer Mentoring for Engagement and Retention: Strengthening Association Communities

Peer mentoring offers association executives a powerful strategy to enhance member engagement and retention by fostering authentic connections, creating community and meaningful learning opportunities. In this session, participants will explore how to create a thriving peer mentoring culture that not only helps attract new members but also sustains long-term commitment. We will cover key strategies for implementing effective mentoring programs tailored to different member demographics, providing tools for attendees to design initiatives that yield meaningful relationships. With peer mentoring as a foundation, associations can nurture both individual growth and organizational resilience. Leave equipped to leverage mentoring as a sustainable, cost-effective tool for member engagement and retention, driving both personal and professional development across their membership base.

Lisa Fain, JD, CEO, Center for Mentoring Excellence

The Road Ahead: Innovating & Transforming Association Business Models for Long-Term Success

Explore how associations can modernize their business models and thrive in a rapidly evolving environment in this forward-thinking panel discussion. Industry leaders will share strategies for transitioning from traditional approaches to innovative models that drive sustainable growth. Learn how to adapt business practices, leverage AI and emerging technologies, and implement forward-thinking strategies to remain competitive. Discover actionable methods for diversifying revenue streams, enhancing member engagement, and staying ahead of emerging trends. Gain

insights into how AI can optimize operations, personalize member experiences, and uncover new opportunities for growth. This session equips you with the tools and transformative ideas needed to reshape your association's approach, ensuring resilience and long-term success in an increasingly dynamic landscape.

Patricia Montague, CAE, CEO, School Nutrition Association

Bill Sheehan, Global Head, Association Strategy, D2L

Mastering the Art of Executive Presence

Discover the transformative power of executive presence in this dynamic session designed to help you embody authentic confidence and show up poised, polished, and prepared. Far beyond a set of skills or techniques, executive presence is a way of being that inspires trust, engages hearts, and moves people to action. Gain actionable insights to enhance your impact, build lasting connections, and lead from your truest self. Whether you're in a leadership role or seeking to amplify your influence, this session equips you with the tools to elevate your presence and navigate every interaction with intention and grace.

Amy Eliza Wong, Founder, Always On Purpose



"Seasonal Spectacular is a game-changer for me every year! It's the perfect chance to meet new vendors, swap ideas, and get inspired. Plus it gives me valuable connections, and supports taking my career and my association to new heights!"



The Premier Networking Event for the Association Community on the West Coast!



Exhibitor sales open in July | Attendee registration opens in Sept.

TUESDAY APRIL 8

7:00 - 8:00 AM SUNRISE ENERGIZER ACTIVITIES

See page 34 for each day's options, time, and location.

7:30 AM REGISTRATION OPENS

Stevenson 1

8:00 - 9:00 AM CHOOSE YOUR BREAKFAST EXPERIENCE

CEO/CAE BREAKFAST - *Sponsored by Novi AMS*

Ferrantes Bayview (Marriott) - Invite-only, plated breakfast served in room

MAXIMIZE YOUR MEMBERSHIP - *Sponsored by Blue Sky eLearn*

Steinbeck 1A/1B - Continental Breakfast served in room

CONTINENTAL BREAKFAST - *Sponsored by re:Members*

Serra Ballroom

9:00 - 10:00 AM GENERAL SESSION

Serra Ballroom - *Sponsored by Grand Sierra Resort & Casino*

REDISCOVER YOUR PLAY

Jeff Harry, Positive Psychology Play Speaker, Rediscover Your Play

10:00 - 10:30 AM NETWORKING & SNACK BREAK

Steinbeck Lobby - *Sponsored by Reno Tahoe*

10:30 - 11:30 AM CONCURRENT LEARNING SESSIONS

ASSOCIATION LEADERS SITUATION ROOM: TACKLING PRACTICAL CHALLENGES - Steinbeck 2

GOVERNANCE IN AN AGE OF TURBULENCE: TRENDS, CHALLENGES, AND INNOVATIONS - Steinbeck 3

PERFECTING NONPROFIT FINANCE WITH AI & AUTOMATION TOOLS
Steinbeck 1C

TURN WHAT YOUR SMES KNOW INTO WHAT YOUR LEARNERS NEED
Steinbeck 1A/1B

11:45 AM - 1:15 PM BOARD INSTALLATION & NEW CALSAE BRAND REVEAL LUNCHEON

San Carlos Ballroom (Marriott) - *Sponsored by Miller Kaplan*

1:30 - 2:30 PM CONCURRENT LEARNING SESSIONS

▶ **ELEVATING THE MEMBER EXPERIENCE: BLENDING PERSONALIZATION, AUTOMATION, AND A DASH OF AI**

Steinbeck 3

EVERYBODY HATES BOARD MEETINGS, BUT WE HAVE A FIX!

Steinbeck 2

EMERGENCY PREPAREDNESS - PART 1: LEADERSHIP DURING AN EMERGENCY

Steinbeck 1A/1B

FROM PLAN TO ACTION: MAXIMIZING THE IMPACT OF YOUR STRATEGIC VISION

Steinbeck 1C

2:30 - 3:00 PM NETWORKING & SNACK BREAK

Steinbeck Lobby

3:00 - 4:00 PM CONCURRENT LEARNING SESSIONS

CREATING A ROADMAP TO MEMBER ENGAGEMENT

Steinbeck 3

NAVIGATING DIFFICULT CONVERSATIONS THROUGH PLAY

Steinbeck 1C

EMERGENCY PREPAREDNESS - PART 2: THE SITUATION ROOM

Steinbeck 1A/1B

THE STAY INTERVIEW: A PROACTIVE APPROACH TO RETAINING TOP TALENT

Steinbeck 2

4:15 - 5:00 PM PEER-POWERED LABS

TRANSFORMING ASSOCIATION MEETINGS AND EVENTS

Steinbeck 3

STRENGTHENING ASSOCIATION LEADERSHIP

Steinbeck 2

ELEVATING MEMBERSHIP STRATEGIES

Steinbeck 1A/1B

MARKETING MASTERMINDS: INSIGHTS FOR INNOVATION

Steinbeck 1C

RISING LEADERS: INSIGHTS FOR EMERGING ASSOCIATION PROFESSIONALS

Stevenson Terrace

5:45 - 6:00 PM FIRST-TIMERS/SOLO ATTENDEE GATHERING

Fin + Field Bar (Marriott)

6:00 - 8:00 PM "SEAS THE NIGHT" DINNER & SILENT AUCTION

San Carlos Ballroom (Marriott)

Support CalSAE programs and services by bidding on over 40 fabulous items. View the full list of **Silent Auction items on page 27** or scan the **QR code**, bidding is open through 8:00pm on Tuesday, 4/8.



Argh matey, be sure to dress in yer best swashbucklin' pirate threads, there will be a prize for best dressed!

Wine provided by Visit Santa Barbara

Décor provided by Association Management Solutions (AMS)

8:00 - 10:00 PM AFTER PARTY

Characters Bar (Marriott) - *Sponsored by Visit Newport Beach*

Free drink ticket for Association Professionals attached to your name badge.

TUESDAY LEARNING SESSIONS

9:00 - 10:00 am General Session

Rediscover Your Play

We often measure our self-worth through our achievements and external results. Many people define success as accomplishing a specific goal or purpose while overlooking how they got there. Fulfillment and happiness exist when you can let go of the results, follow your curiosity, and enjoy the ride. Research shows that the more we play, the more open we are to the countless possibilities in front of us. In this interactive workshop, you will identify your play values, engage in brainstorming sessions to help find your play, and discover actionable ways to get into flow.

Jeff Harry, keynote speaker + emcee, Rediscover Your Play

10:30 - 11:30 am Concurrent Learning Sessions

Association Leaders Situation Room: Tackling Practical Challenges

Back by popular demand: Step into the Situation Room — a dynamic forum designed to tackle challenges faced by today's association leaders. This interactive session invites association leaders to share real-world obstacles, exchange ideas, and uncover actionable solutions. Leave with a strengthened network of peers and new tools to lead your association with confidence and resilience. Join CalSAE President, Jim Anderson as he facilitates a lively and interactive session to solve common challenges together to elevate your leadership impact! .

Jim Anderson, CAE, President, CalSAE

Governance in an Age of Turbulence: Trends, Challenges, and Innovations

Nothing consumes CEOs more, nor is more important to the association than its governance and the board-CEO partnership. Learn about the key issues, trends and emerging practices as observed by the ASAE Association Governance Center. These will include new developments in board selection and development, strategic planning, design and conduct of board meetings, board structure and culture, and CEO-Board relations. Join us for provocative and interactive discussion where we will share our challenges and approaches and learn from each other how we leverage our governance for maximum impact.

Paul Pomerantz, Managing Director, Governance Institute, ASAE Business Solutions, ASAE

Perfecting Nonprofit Finance with AI & Automation Tools

Discover how AI and automation tools are transforming the nonprofit finance landscape. In this session, we will introduce tools designed to streamline repetitive tasks, enhance financial accuracy, and improve overall efficiency in your finance function. We will show how these tools will save time, reduce manual errors, and increase the financial transparency your leadership demands. We'll walk through practical examples, highlighting how these technologies are reshaping everyday operations, from budgeting and forecasting to accounts payable and receivable management.

Alicia Eastvold, CPA, Manager, YPTC Technology, Your Part-Time Controller

Edwin Harvey, Ph.D., Director of AI Solutions & Training, Your Part-Time Controller

Teresa Henderson, MST, CPA, Manager, Association and Membership Organizations Practice, Your Part-Time Controller

Turn What Your SMEs Know Into What Your Learners Need

You want your members to see you as the go-to resource for professional development. And your association has experts. Lots of them. But do those two things always line up? When creating learning content, subject-matter experts (SMEs) with the best intentions can end up

creating content that's long on information, short on practical application, and wrapped up in a bullet-point PowerPoint bow. The next thing you know, your members are going to YouTube to find what they need instead. In this session, you'll learn five key strategies for making your content come alive in the classroom or online. Gain practical insights, tips, and resources for making the most of your SME's expertise and harnessing that power in a productive and helpful way. You'll walk away better able to move your educational content from simply conveying content to helping your members solve the real problems they face every day.

Amy Morrissey, President, Artisan Learning

1:30 - 2:30 pm Concurrent Learning Sessions

Elevating the Member Experience: Blending Personalization, Automation, and a Dash of AI

Struggling with membership management? You're not alone. Balancing renewals, events, and daily demands often leaves little room for the meaningful connections that truly matter. But what if you could simplify the chaos and reignite the joy in membership engagement? Uncover strategies for building a dynamic membership culture that marries personalized connections with smart automation. Discover how to map the member journey, leverage AI, and implement innovative techniques that transform the member experience. Whether you are a seasoned pro or new to the field, this session is packed with actionable insights to elevate your impact and create deeper member engagement. Leave with fresh ideas, practical tools, and the confidence to make membership not just manageable but truly memorable. Get ready to revolutionize your approach and bring the fun back to your membership strategy!

Joseph Burak, MBA, Chief Strategist, TRANSiT Strategy & Analytics

Dani Siver, Director of Membership and Events, Westside Economic Alliance

Everybody Hates Board Meetings, But We Have a Fix!

While the title is irreverent, our goal is a serious one. We want to help attendees find more productive and meaningful ways to run board meetings for better outcomes for directors and their associations. This will be a panel discussion among experts, like yourself, who are steeped—and committed to—good governance. During this session, we will explore how association leaders can take steps to plan meetings for positive outcomes, navigate difficult issues, provide board members a favorable experience, and to communicate, and act on, the board's actions.

Paul Pomerantz, Managing Director, Governance Institute, ASAE Business Solutions, ASAE

Emergency Preparedness - Part 1: Leadership During an Emergency

In this two-hour immersive workshop, you will explore the real-world challenges and solutions of conference emergency management in this engaging panel discussion. This session teaches the basics of the Incident Command System (ICS) and the need for strong leadership during an emergency. This concept empowers staff to work effectively with each other and first-responders. The curriculum presented will provide the framework for a Discussion-Based Exercise (DBE) that you will participate in Part 2 of this presentation.

Stan Szpytek, President, Fire and Life Safety, Inc.

Laura Thomas, CoFounder, GatherSafe

From Plan to Action: Maximizing the Impact of Your Strategic Vision

A thriving association depends on a strategic plan that truly reflects its members' needs and fuels engagement and growth. This session will equip you with practical tools to create a data-driven, inclusive plan that serves as a roadmap for decision-making and daily operations. Learn how to align meetings, budgets, and communications with your strategy while ensuring leadership accountability and follow-through. Walk away with a best-practices checklist, real-world examples

of tracking progress, and strategies to showcase your successes. No matter your association's size, you'll leave ready to transform your strategic plan into a dynamic, results-driven resource.

Trinette Marquis, APR, Executive Director, California School PR Association

3:00 - 4:00 pm Concurrent Learning Sessions

Creating a Roadmap to Member Engagement

Growing engaged members begins on their very first day. This session will help you create a dynamic roadmap to cultivate an active and invested membership. Learn how to inspire excitement around your association's vision and mission, guide members to find their fit in events and leadership roles, and provide opportunities for both personal and professional growth. Explore strategies to build a thriving, inclusive community that makes volunteering fun and rewarding. Discover how to help members measure their success and see the tangible value of their membership. Bonus: this roadmap doesn't just engage members—it develops future leaders! You'll leave with practical tools and actionable techniques to implement immediately, driving your association's success and ensuring a vibrant and engaged membership for years to come.

Jim Roman, Founder, Business Owners Institute

Navigating Difficult Conversations Through Play

We will facilitate a series of experiential activities that will provide you with play-oriented tools to practice exploring language and tone, shifting perspectives, and questioning the stories in your head. Let us help you redirect the mental energy currently devoted to unhealthy coping mechanisms and channel it towards identifying the underlying obstacles getting in the way of understanding each other. Replace confusion with clarity by adjusting your communication habits that will help build a stronger, healthier future for us all.

Jeff Harry, Rediscover Your Play

Emergency Preparedness - Part 2: The Situation Room

Enter a high-stakes environment where you'll tackle the critical art of emergency management. In Part 2 of this interactive session, you'll navigate real-world crisis scenarios using an Incident Command System (ICS) framework. Acting as an incident commander, you'll gain firsthand experience in setting objectives, defining operational periods, and applying actionable emergency management protocols. This discussion-based exercise will also help you enhance team communication, build confidence in managing emergencies of any size or complexity, and develop practical skills that translate seamlessly to real-life situations. Prepare to elevate your crisis leadership capabilities with scenario-based training designed to make a lasting impact.

Stan Szpytek, President, Fire and Life Safety, Inc.

Laura Thomas, CoFounder, GatherSafe

The Stay Interview: A Proactive Approach to Retaining Top Talent

Retaining top talent is essential for an association's success, and fostering a positive workplace culture is key. According to SHRM's 2023 Global Workplace Culture Report, employees in a healthy work environment are 96% less likely to dread going to work and 78% less likely to seek new opportunities within six months. Unlike exit interviews, which focus on why employees leave, stay interviews are proactive conversations designed to understand current employees' motivations, concerns, and aspirations—empowering associations to enhance engagement and retention. This session will guide you in building trust, asking meaningful questions, and developing personalized retention strategies. Learn practical methods to document discussions and follow through effectively. Discover how stay interviews can transform your workplace culture, strengthen employee connections, and drive organizational success.

Jessica Rivera, MBA, PHR, SAHRA, Sr. Trainer, California Employers Association

4:15 - 5:00 pm Peer-Powered Labs

Transforming Association Meetings and Events

Connect with fellow association professionals in this interactive learning circle designed to spark ideas and share experiences about planning and managing meetings and events. Dive into candid discussions about current trends, challenges, and opportunities in the events space, from hybrid and virtual formats to sustainability and attendee engagement strategies. This conversational session encourages participants to exchange insights, practical solutions, and lessons learned from their own experiences. Bring your questions, ideas, and expertise to contribute to a dynamic dialogue that will leave you with fresh perspectives and actionable takeaways for your next event.

Strengthening Association Leadership

This peer-driven discussion brings together association leaders to collaboratively explore effective strategies for strengthening leadership and driving organizational success. Through guided discussions and real-world examples, participants will share challenges, successes, and innovative approaches to leadership development. Topics include building diverse leadership teams, fostering a culture of collaboration, and creating impactful leadership succession plans. Gain valuable insights on how to empower teams, navigate leadership transitions, and align leadership practices with the association's mission and goals. Leave with practical tools and strategies to elevate your leadership approach, strengthen your organization's capacity, and inspire your team for the future. Bring your leadership challenges and leave with actionable solutions from your colleagues.

Elevating Membership Strategies

Explore innovative membership strategies that drive growth and engagement. This open forum invites you to share challenges, insights, and success stories with fellow association professionals who are reimagining membership models to meet evolving member expectations. Together, we'll discuss strategies for attracting diverse audiences, enhancing member value, and increasing retention. Whether you're refining your existing strategies or starting from scratch, you'll leave with fresh perspectives, actionable ideas, and a network of peers who are equally passionate about membership innovation. Elevate your approach and help shape the future of membership success!

Marketing Masterminds: Insights for Innovation

Step into this dynamic, peer-driven conversation to exchange ideas and uncover fresh approaches to association marketing. This interactive session is a space to share challenges, innovative campaigns, and real-world successes with fellow professionals who are navigating the ever-changing marketing landscape. With no formal presentations, the focus is on collaboration and knowledge sharing with actionable takeaways tailored to your needs. If you are exploring new marketing tools or refining your existing campaigns, you'll leave with creative insights, practical tips, and connections to energize your marketing efforts. Join us to spark ideas and strengthen your marketing impact!

Rising Leaders: Insights for Emerging Association Professionals

Experience the power of peer-led learning in this session designed for new, and emerging professionals shaping the future of associations. This interactive forum highlights innovative ideas, challenges, and solutions from the next generation of association leaders. Dive into discussions on navigating career growth, embracing new technologies, and rethinking traditional approaches to member engagement and operations. This is your chance to share experiences, ask questions, and gain actionable insights in a supportive and forward-thinking environment. Whether you're starting your journey in the association world or looking to connect with rising leaders, this session offers valuable perspectives and fosters connections across all career stages. Come prepared to contribute, learn, and leave inspired to drive change in your association.

WEDNESDAY APRIL 9

7:00 - 8:00 AM SUNRISE ENERGIZER ACTIVITIES

See page 34 for each day's options, time, and location.

8:00 AM REGISTRATION OPENS

Stevenson 1

8:30 - 9:30 AM CONTINENTAL BREAKFAST

Steinbeck Lobby - *Sponsored by Higher Logic*

8:45 - 9:15 AM COFFEE & CONVERSATION - CAE CURIOUS?

Steinbeck 1C

9:30 - 10:30 AM CONCURRENT LEARNING SESSIONS

ENERGIZE YOUR CONFERENCE: HOW TO SUPERCHARGE YOUR CONTENT, WORKSHOPS, & PARTICIPANTS

Steinbeck 1A/1B

SPEAKING THEIR LANGUAGE: USING THE 5 LANGUAGES OF APPRECIATION TO MOTIVATE BOARDS AND TEAMS

Steinbeck 3

STANDING OUT IN A CROWD

Steinbeck 2

10:30 - 11:00 AM NETWORKING/SNACK BREAK

Steinbeck Lobby

11:00 AM - 12:00 PM CONCURRENT LEARNING SESSIONS

ASSOCIATION MEETING PLANNING CHALLENGES & BEST PRACTICES

Steinbeck 3

▶ LEVERAGE STORYTELLING INTO MONEY-MAKING CONTENT

Steinbeck 1A/1B

READY PLAYER YOU: GAMING LEADERSHIP LESSONS

Steinbeck 2

12:15 - 1:30 PM CLOSING LUNCHEON

San Carlos Ballroom (Marriott) - *Sponsored by Visit Newport Beach*

All Association Professionals in attendance will be eligible to win a registration package for ELEVATE 2026 in Newport Beach, which includes three nights at the Hyatt Regency Newport Beach plus a “Moke” destination experience and a basket full of destination swag!

ASSOCIATIONS IGNITE!

Get ready for fast-paced, high-energy idea sharing! Associations IGNITE features dynamic 5-minute presentations, each built on 20 slides that auto-advance every 15 seconds. In just minutes, you'll be inspired by fresh thinking in these fun rapid-fire talks featuring:

- **Tap Into Your Passion: Finding Joy and Purpose Through What You Love** - Cher Ekasala, CAE, VP + Chief Administrative Officer, Compass Management Solutions
- **The Power of a Mask in LIFE**
- Julio Arias Jr., Sales Manager, Pacific Palms Resort
- **What's SUP? Life Lessons from Paddleboarding and Water Safety**
- Anne Ornelas, DES, Senior Manager, Business Systems and Strategic Initiatives, CASSS

Grab a departure treat as you head out!

Sponsored by Portola Hotel & Spa at Monterey Bay



A one-day immersive exploration of emerging ideas, industry trends and leading best practices in association membership and marketing.

DoubleTree by Hilton Sacramento



WEDNESDAY LEARNING SESSIONS

8:45 - 9:15 am Coffee & Conversation CAE Curious?

If you are considering the Certified Association Executive (CAE) designation, we invite you to join us for an info session to learn what the CAE can do for your professional development and career advancement. Whether you are a developing leader or an experienced association professional, the CAE certification will enhance your professional acumen. Hear from CalSAE staff on the CAE application process and guidelines, and learn from newly minted CAE's about their experience preparing for the exam and get all your questions answered about the process.
Megan Denhardt, CAE, Education Consultant, CalSAE

9:30 - 10:30 am Concurrent Learning Sessions Energize Your Conference: How to Supercharge Your Content, Workshops, & Participants

The vibe of your meeting or conference is established the moment attendees walk in. Will they think, "This is predictable and informative," or "Wow – this is going to be fun!"? Research shows our brains retain more information when we create space for participants to process content and tap into the collective knowledge in the room. This session will explore how to design engaging conferences and meetings that bridge the gap between rookies and veterans, fostering valuable networking opportunities. Learn how conference design impacts memory retention, gather best practices for more engaging general sessions and workshops, and brainstorm creative ideas to infuse energy and excitement into your event. Walk away with actionable strategies to create experiences that captivate and energize attendees, ensuring lasting impact.
Becky Lunders, Founder, Consultant and Trainer, teamWorks

Speaking Their Language: Using the 5 Languages of Appreciation to Motivate Boards and Teams

In today's diverse and hybrid work environment, effective communication across generations and work styles is essential to avoiding miscommunication, increasing engagement, and reducing turnover. This interactive session will introduce you to the 5 Languages of Appreciation in the Workplace, providing practical insights on how to tailor your communication to motivate both board members and team members. You'll learn how to identify others' preferred languages and apply them to foster more productive meetings and a cohesive, motivated team dynamic. By the end of the program, you'll gain a deeper understanding of your own and others' motivators, helping to bridge disconnects, inspire colleagues, and create positive feedback loops. With actionable tools at your disposal, you'll enhance morale, strengthen loyalty, and boost overall efficiency, ultimately improving outcomes across your organization.
David Ackert, MA, CEO, Pipeline Plus

Standing Out in a Crowd

In the association industry, as in many sectors, diversity often falls short. This panel brings together trailblazing leaders who have navigated challenges around visibility and representation. Through personal stories and actionable strategies, the panel will explore how embracing authenticity can lead to professional growth, stronger member and stakeholder relationships, and a deeper sense of community in the workplace. Attendees will gain valuable insights into the importance of authenticity, visibility, and the impact of integrating one's heritage and identity into professional life. This session will empower participants with practical advice to excel in their

careers while celebrating their unique identities. Leave with renewed confidence, actionable tools, and inspiration to make a meaningful impact in your career and within the association industry.

Teresa Excinia, CAE, MBA, Executive Director, California Advocates Inc.

John Hooley, President, Steward

Sheila Johnston, Co-Founder & Chief Growth Officer, Luminari Partners

Gary Murakami, GTP, GLP, CMP - Fellow, CMM, DES, VP, Global Sales & Industry Relations, Teneo Hospitality Group

11:00 am - 12:00 pm Concurrent Learning Sessions **Association Meeting Planning Challenges & Best Practices**

Join us for an interactive, facilitator-led discussion on the evolving landscape of meeting planning in the association sector. In this session, we will explore the challenges faced by meeting planners in today's post-pandemic environment and discuss innovative solutions to address them. Unlike traditional sessions, this format encourages active participation where you can share your own challenges, learn how others are adapting to the changing landscape, and collaborate with peers. Gain insights into current industry trends, hear real-world experiences, and walk away with new strategies and connections that will help you navigate the complexities of meeting planning and elevate your event success. Come prepared to engage, learn, and contribute to this dynamic conversation.

Touda Bentatou, Director of Customer Onboarding, Novi AMS

Threasa Hernandez, Event Manager, CITE (CA IT in Education)

Diane Niggli, Senior Director, Global Accounts, HelmsBriscoe

Michele Pearce, Senior Conference Sales Manager, See Monterey

Leverage Storytelling Into Money-Making Content

Storytelling is more than just entertainment—it's a powerful tool to turn content into revenue for your association. In this interactive session, you'll learn how to uncover authentic stories within your organization that connect with your members and resonate across various platforms, including social media, email, and in-person events. Discover strategies to evoke emotional responses from your audience, turning engagement into real-world results such as increased sponsorships and revenue. With a focus on actionable steps, you'll leave equipped with the knowledge to create story-driven marketing campaigns that not only elevate your brand but also grow your bottom line, driving both membership growth and financial success.

Amy Hager, Founder and CEO, Amy Hager Solutions

Ready Player You: Gaming Leadership Lessons

Have you ever led a raid on a secure facility or tried to steal a dragon's hoard? No? How about crafting a strategic plan while juggling members, board meetings, committees, and advocacy? Of course, because you work at an association! Leading in this environment requires knowledge, experience, and collaboration. This session explores the varied world of games and how they can help you be both a better leader and a better teammate. Games create a dynamic space to experiment, build relationships, and strengthen strategic thinking. Join us as we dive into how gaming can enhance your leadership abilities, improve communication, and foster team cohesion. After all, kids learn from playing games—and adults can too! Discover how incorporating games into your leadership strategy can teach valuable skills while having fun!

Karl Baur, CAE, CMP, Senior Executive Director, Association Resource Center (ARC)

Melanee Cottrill, MBA, CAE, Executive Director, Head Start California

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Handlery Union Square Hotel, 1-Night Stay

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Margaritaville Resort Lake Tahoe, 2-Night Stay

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Marketing, Messaging And Positioning Makeover 90 Min Session

Donated by: Amy Hager

Marriott Burbank, 2-Night suite Stay

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Marriott Long Beach Downtown including parking, 2-Night Stay

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Monterey Plaza Hotel & Spa, 2-Night Stay

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Ocean View Board Room at The Cliffs Hotel & Spa for 1 day

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Pacific Palms Resort, 2-Night Stay & play

Donated by: Julio Arias

Renaissance Esmeralda, 2-Night Stay

Donated by: Andrea Ochoa

Renaissance Palm Springs Hotel, 2-Night Stay

Donated by: David Bremer

Sheraton Grand Sacramento, 1-Night Stay

Donated by: Teng Lorenzo

Silverado Resort, Napa, 2-Night Stay + golf and dining credit

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Tenaya at Yosemite plus breakfast, 2-Night Stay

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The Grand Hotel in Salem, 1-Night plus wine tasting package

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The LINE LA Hotel with \$100 food credit, 2-Night Stay

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Donated by: Cynthia Ordyke

The Westin Rancho Mirage Resort, 2-Night Stay with breakfast

Donated by: Jennifer Starnes

The Westin St. Francis, 2-Night Stay

Donated by: Laura Campi

The Westin South Coast Plaza, 2-Night Stay

Donated by: Monique Frankfort

Town & Country Resort in San Diego, 2-Night Stay

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Visit Amador Gift Basket

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Westin Pasadena Stay plus package, 2-Night Stay

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Ice Breaker Scavenger Hunt Contest

Make Connections for a Chance to Win a Prize!

Looking for a fun way to break the ice, meet new people, and win a prize at ELEVATE? Join the JabberYak Scavenger Hunt! This interactive challenge is designed to spark meaningful conversations and help you connect with fellow attendees. Complete the scavenger hunt to be entered into a prize drawing.

One lucky winner will receive a \$100 Amazon gift card, announced Tuesday at the General Session.

How to Play

1. Scan the QR code on the back of your button to sign in and get started.
2. Find a match for each of your 7 interests on someone else's button.
3. Fill out their name and answer the question associated with their interest.
4. Hit submit when you've found all 7 people.
5. Complete by Tuesday, 4/8 before 9 am to be eligible for the drawing.



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SUNRISE ENERGIZER ACTIVITIES

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MONDAY OPTIONS 7:00 - 8:00 AM

Option 1 – Explore Monterey Walk (Meet in Marriott Lobby)

Take a group walk to enjoy some local history and landmarks that are less than a mile away. Stops will include Monterey Moon Tree, Old Monterey Jail, Monterey Ghosts House, and more. Digital map provided.

Option 2 – Circuit Training (Stevenson Terrace)

Sets, Reps, and Rest - ELEVATE your fitness and well-being with a heart pumping playlist and an all-ability, whole body circuit training session. Each station can be modified for your fitness level and health needs with safe adjustments. Led by Dani Siver

TUESDAY OPTIONS 7:00 - 8:00 AM

Option 1 – Group Jog to Dennis the Menace Park (Meet in Marriott Lobby)

Get a pep in your step while experiencing everything this fun filled Hank Ketcham Park has to offer. Go at your own pace and get active on the sunrise steps, rock climb wall, and/or find yourself out of the crazy maze. (1.4 miles round trip)

Option 2 – Circuit Training (Stevenson Terrace)

Sets, Reps, and Rest - ELEVATE your fitness and well-being with a heart pumping playlist and an all-ability, whole body circuit training session. Each station can be modified for your fitness level and health needs with safe adjustments. (45 mins). Led by Dani Siver

WEDNESDAY “LET’S KEEP IT LIGHT” 7:00 - 8:00 AM

Explore Monterey Local Coffee Shop Walk (Meet in Marriott Lobby)

Plumes Coffee & Tea (1 min walk)

Old Monterey Café (5 min walk)

East Village Café (8 min walk)

SEE YOU
NEXT YEAR!



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