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ANNUAL MEETING

May 29 & 30, 2019

Ocean Edge Resort & Golf Club

Brewster, MA

#NESAE2019





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WEDNESDAY
MAY 29, 2019

MORNING

12:00 PM
Mansion Ballroom

Golf Outing
(Pre-registration required)

Registration & Welcome Mingle
Join us for light bites and networking with fellow members, volunteers, and staff before we kick-off the opening general session.

Thank You to Our Welcome & Mingle Sponsor:

capecod CHAMBER OF COMMERCE CONVENTION & VISITORS BUREAU

1:00 PM – 2:00 PM
STRATEGIC

Mansion Ballroom

Opening General Session
The Downside to Being a Unicorn

Robbie Samuels, Author, "Croissants vs. Bagels"

Thank You to Our Opening General Session & Book Sponsor:

BABSON / EXECUTIVE CONFERENCE CENTER

Think back to your first time attending a professional conference. Your experience as a first-timer influenced your perception of the meeting and the host organization. We're all nervous about meeting a large room full of strangers, but many of us worry that we won't fit in. Sometimes the difference we're concerned about is obvious and other times it's more subtle. To increase retention, we need to do more than invite diverse participants; we need to welcome them. How well participants are welcomed is a top driver of how likely they are to return in subsequent years. To succeed at this, a host mindset needs to go beyond leaders and become a mandate of all members.

2:00 PM – 2:15 PM

Break
Walk over to the Carriage House for our breakout sessions.

2:15 PM – 3:15 PM
APPLIED

Samuel Nickerson (Carriage House)

Breakout Sessions
Unlocking the Member Voice: An All New Member Benefit and Revenue Generator

Joanna Pineda, CEO & Chief Troublemaker, Matrix Group International, Inc.

Teri Carden, Founder & CEO of ReviewMyAMS and 100Reviews

While average associations get the biggest chunk of annual revenues from membership dues, reliance on dues driven revenue is waning. For many associations, raising dues is an unwelcome idea, a difficult process, and/or both. To continue effectively funding operations while holding dues increases in check, many organizations are increasing focus on driving non-dues revenue. There are many new and innovative non-dues revenue programs that empower you to provide all new value to the markets in your profession or industry, but one in particular is standing above the rest -- online review sites. Niche review sites powered by the association are a potential gold mine of non-dues revenue and currently an untapped marketplace that's ripe and affordable for associations to implement. Members don't trust advertising as much as they trust reviews from their peers and millennials' buying power at work is increasing along with their expectation to be able to read reviews on the products and services they are buying while behind the desk. Learn why associations are perfectly positioned to provide online review resources so members can make smarter, data-driven workplace buying decisions.

APPLIED

Roland Nickerson (Carriage House)

Getting it right: Hiring basics including legal dos and dont's when hiring your work force

Saleha Walsh, Vice President, Insource Services, Inc.

Elizabeth S. Reinhardt, Esq., Attorney, Law Offices of Elizabeth Reinhardt

In this session, we will review hiring tips and pitfalls with an emphasis on compliance. Included in this session will be highlights to consider with regard to the recent changes in the Massachusetts Pay Equity Act, the Massachusetts law regarding non-competition agreements, which became effective October 1st of 2018 and the upcoming Massachusetts Paid Medical and Family Leave changes which require action on your part within the next month.Thanks for all your help with the back and forth on these items this week!

APPLIED

Addie Nickerson (Carriage House)

Art of the Schmooze

Robbie Samuels, Author, "Croissants vs. Bagels"

Traveling to an industry meeting takes effort. Do you have a plan for how to make the most of this opportunity? Not just the content. Connections. Meetings convene industry influencers, newcomers, and everyone in between. Whether it's your first time attending, or this meeting feels like a reunion, you need the right tools, skills, and mindset to know how to approach fellow participants. Whether you are an introvert or extrovert, your impact on the world is directly related to your willingness to build great relationships and act on new opportunities. This session will show you how.

3:15 PM–3:30 PM

Cape Cod Break

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3:30 PM–4:30 PM

HANDS-ON

Addie Nickerson
Samuel Nickerson
Roland Nickerson

Discussion Groups

Join your association management colleagues for facilitated conversations in one of our three discussion groups. Attendees identified topics of interest in the week before this conference, and the top three trending topics have been identified and assigned to a discussion room. Come with your questions, concerns, and ideas and learn from, and with, your peers!

Topics to be announced on Wednesday afternoon.

4:30 PM–5:30 PM

Front Lawn

Fun & Games

Join us on the lawn for casual fun & games before the reception.

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5:30 PM–7:00 PM

Bay Pines Pavilion

Reception & Exhibits

Visit exhibits, bid on our silent auction items, and enjoy food & beverages highlighting the best the Cape has to offer.

Thank You to Our Host & Reception Sponsor:

OCEAN EDGE
RESORT & GOLF CLUB

7:00 PM–9:00 PM

Dinner on Your Own

8:00 PM

Bayzo's Pub

Young Professionals Meet-Up

Come meet the Young Professionals Committee as we host our first meet-up! We are a committee dedicated to the needs of younger members who are new to association management, and we would love to hang out with you! Join us for some appetizers, beverages, and new connections in Bayzo's Pub.

9:00 PM–10:00 PM

The Beach

Beach Fire – *S'mores Included!*

Stop by the DoubleTree by Hilton Portland booth during the reception and enter your business card to win a Sea Bags® tote loaded with Maine goodies at the Fire. Then, meet us on the beach for a fire, S'mores, and fun!
Rain location: Bayzo's Pub

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CONTACT:

James Boucher

Director of Sales

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THURSDAY
MAY 30, 2019

8:00 AM – 9:00 AM
Bay Pines Pavilion

Breakfast & Exhibits

9:00 AM – 9:30 AM
Bay Pines Pavilion

Annual Meeting & Awards

9:30 AM – 9:45 AM
Bay Pines Pavilion

Re-Fuel Break

Grab some coffee, make your own trail mix to-go, walk over to the Carriage House and settle in for our next round of breakout sessions.

Thank You to Our Break Sponsor: DEVENS COMMON CENTER

9:45 AM – 10:45 AM

HANDS-ON

Addie Nickerson (Carriage House)

Breakout Sessions

Transforming Your Event into an Experience – Panel Discussion
Christy Dancause, Executive Director, ACG Boston
Bob Russo, Executive Director, Strategy & Creative, VDA, Inc.
Heather Sampson, CMP, DES, Founder/CEO, Aspire Meetings & Events, LLC
Facilitator: Martha Chamberlin, Manager of Membership, Mass-ALA

Meetings and events serve as the cornerstone of most associations' value propositions. For many members, an event is a direct reflection of an association's ongoing work. With changes in technology and competition for your members' time, associations need to transform their events to deliver the possible experience for attendees. Join us for this engaging panel discussion as we explore: How do you move from the traditional conference you've always hosted to develop a true experience for your members? How do you make the most out of your resources to create an event that "wows" your members and engages your supporters? What are other associations and organizations doing that is changing the way events are planned and executed?

STRATEGIC

Roland Nickerson (Carriage House)

The Investment Policy Statement: Strengthening Your Association Through Proper Reserve Oversight
Erica Feldblum, CFP, President, EF Financial
Rachel Clasby, Partner, EF Financial

An Investment Policy Statement (IPS) defines the objectives, constraints, and overall oversight procedures that govern the investment related activities of your association. The IPS is the investment blueprint for an association and is central to the successful oversight and governance of an organization's reserves. The aim of this document is to provide the necessary clarity and parameters that will guide your board when making investment decisions. Well-defined objectives are important to ensuring that the mission of the association can be achieved. Clearly defined objectives such as setting the target asset allocation, along with appropriate minimum and maximum allocations to individual asset classes, is vitally important in the IPS; doing so will help

ensure that the portfolio is invested in accordance with the nonprofit's long-term objectives even during times of market uncertainty. Another important facet of the IPS is that it can help streamline board decision around the investment strategy of the reserves allowing the association to spend more on other, more productive, activities. In this session, we will highlight the how-tos of crafting a statement that responds to the needs of your association as well as the principal duties for association fiduciaries: organization of an investment committee, investment selection and monitoring, understanding investment costs, administrative oversight and education to both the board and investment committee members. Well informed fiduciaries are critical to the financial strength and ultimate success of their association. Don't put yourself, or your organization, at risk.

STRATEGIC

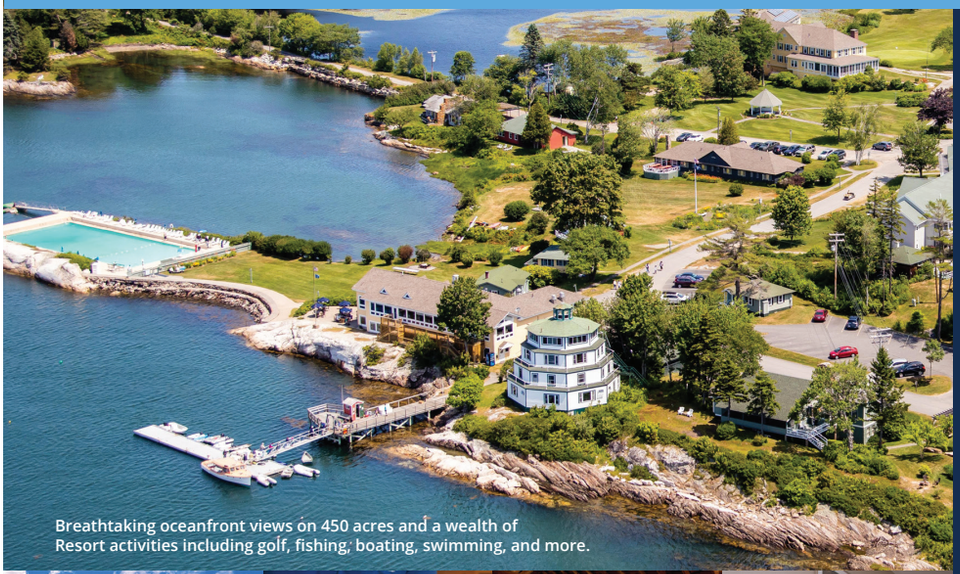
Samuel Nickerson (Carriage House)

Achievement NOW! Success Characteristics

Tyler Enslin, Owner & Professional Speaker, Tyler Enslin International

Tired of the same old motivational speeches on goal setting and time management? While the principles behind such trainings are often legitimate you may be left thinking: That was a great story, but how does it apply to me and my career? What did I actually learn that I can implement in my life today? Achievement Now! Success Characteristics is a highly interactive program that was created to examine both the timeless core principles of success and specific modern techniques to implement them. For those that want to prosper in today's competitive business market, it is essential to develop confidence, a mindset for growth and productivity, strong consistent habits, and outstanding people skills. This one-of-a-kind session is designed to help attendees to cultivate these very traits. Each attendee will leave with a clear list of their own energizing goals, an action plan, and daily practices to manage their mindset and promote constant growth. Whether you aspire to take your career to new heights, build a successful business, improve your physical health, or personal relationships, this program will provide you with the tools that you need to thrive.

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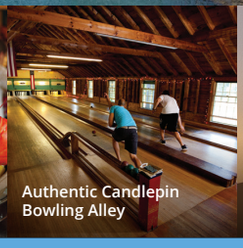
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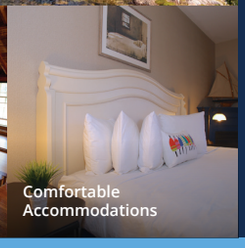
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10:45 AM–11:45 AM
Bay Pines Pavilion

12:00 PM–1:00 PM
HANDS-ON
Addie Nickerson (Carriage House)

STRATEGIC
Roland Nickerson (Carriage House)

Break & Exhibits

Silent Auction & Scavenger Hunt winners announced at 11:20 AM. Be present to win!

Breakout Sessions

Working with 'Tough' Boards – Panel Discussion
Donna Dunn, Senior Consultant, Tecker International
Rachel Tristano, Chief Executive Officer, South Shore REALTORS®

An association's Board of Directors has three official duties: care, loyalty, and obedience. The Board-staff relationship is a complex dynamic that requires both technical and 'soft' skills to navigate. Board challenges can come in many shapes and sizes ranging from micromanagement, personality differences, mistrust of staff, 'rogue' Board members, and more. Join our panelists as they share their experiences working with 'tough' Boards and discuss how they'd face difficult Board situations. Are you facing a challenge with your Board that you'd like help from your peers on? This session will also include time for audience participation in a confidential, safe space.

O Captain! Wait-Who's My Captain?
How to Navigate in Today's Distracted, Over-Connected, Constantly Interrupted Tech Environments
Linda Stacy, CEO & Founder, LivingBluPrints

In association management, people are the most expensive, and most valuable, resource. A common



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factor in most organizations is that we don't teach/learn H.O.W. to work optimally. We overlook aspects of dynamic work environments; how individuals and teams approach tasks, priorities, overwhelm, fatigue, distractions, emergencies ... even internal energy reserves. We fail to teach fundamentals that drive motivation and personal empowerment â€" the same keys that drive excellence, career and organizational growth. In this session you will not only learn three critical levers for fully optimized workday, you'll get a chance to interact with your peers and structure a framework for immediate action. Key Take-Aways + Understand critical levers to allow identification and optimal execution of key priorities + Build customized/personal success equations based on The H.O.W. Advantage model + Carve personal critical paths/action steps for immediate application

APPLIED

Samuel Nickerson (Carriage House)

Grow Your Association's Membership with LinkedIn

Sandra Long, Post Road Consulting

Linked is the online networking platform where your association members spend their time to build their brands, networks, careers and grow their businesses. Your association can retain current members and connect with new prospective ones by leveraging LinkedIn. In this session, you will learn: Benefits and tradeoffs of LinkedIn Groups and Pages; the latest content and thought leadership options now available on LinkedIn to promote your organization's brand; How LinkedIn personal branding and networks can impact your Association's results on LinkedIn.

1:00 PM

Mansion Ballroom

Lunch Served

1:15 PM – 2:30 PM

STRATEGIC

Mansion Ballroom

Closing General Session, Over Lunch

The Science of Happiness

Catherine Sanderson, Manwell Family Professor of Life Sciences (Psychology), Amherst College

This talk presents both surprising and not-so-surprising information on the science behind happiness. What role do money, marriage, friends, children, weather, age, and religion play in making us feel happier? Is happiness stable over time? How can happiness be increased? Professor Catherine Sanderson will describe cutting-edge research from the field of positive psychology on the factors that do (and do not) predict happiness, and provide participants with practical (and relatively easy!) ways to increase their own psychological well-being at home and in the workplace.

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2:30 PM

Adjournment

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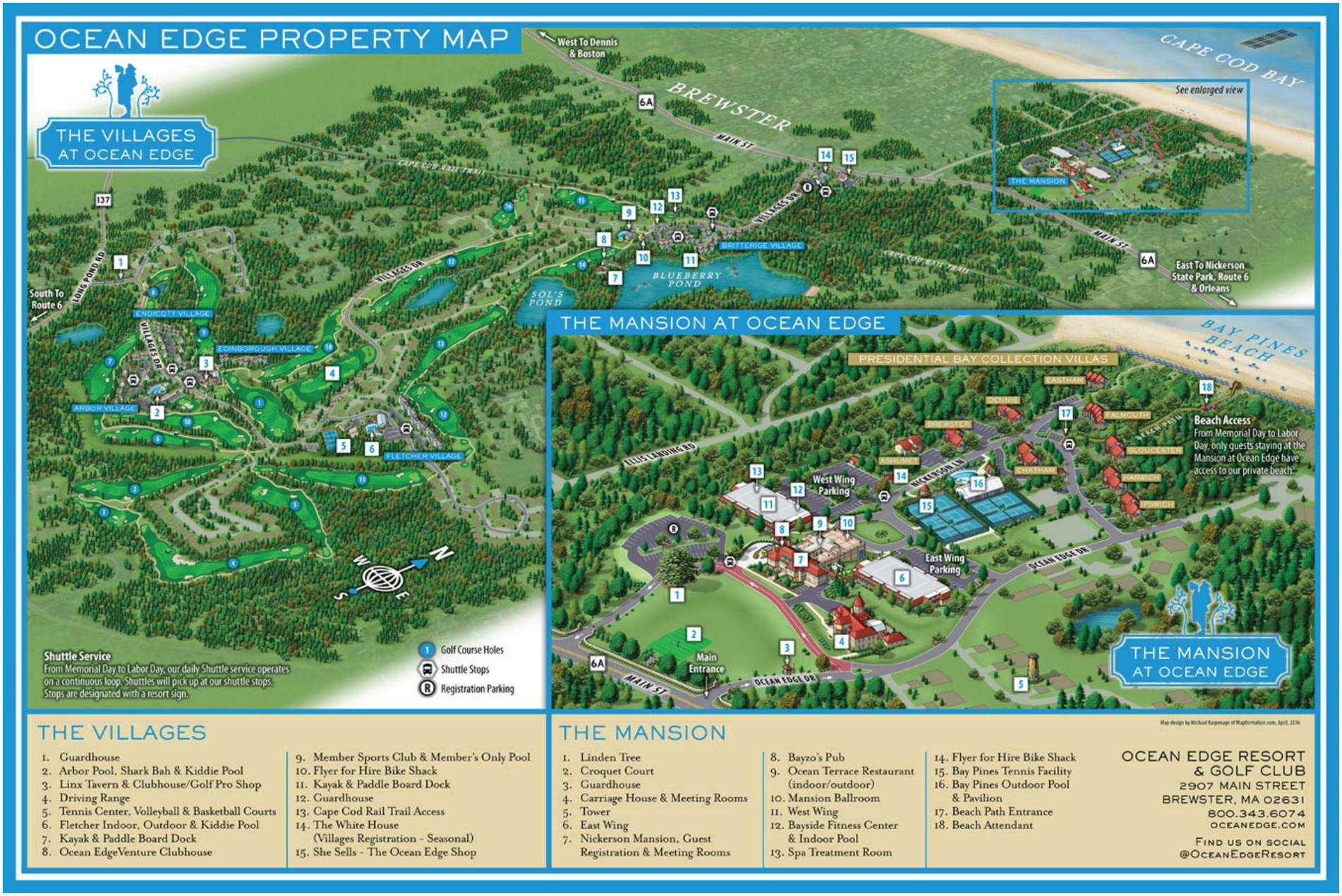


RISING STAR AWARD

Jon Gerstenberger

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3. Linx Tavern & Clubhouse/Golf Pro Shop
4. Driving Range
5. Tennis Center, Volleyball & Basketball Courts
6. Fletcher Indoor, Outdoor & Kiddie Pool
7. Kayak & Paddle Board Dock
8. Ocean EdgeVenture Clubhouse
9. Member Sports Club & Member's Only Pool
10. Flyer for Hire Bike Shack
11. Kayak & Paddle Board Dock
12. Guardhouse
13. Cape Cod Rail Trail Access
14. The White House (Villages Registration - Seasonal)
15. She Sells - The Ocean Edge Shop

THE MANSION

1. Linden Tree
2. Croquet Court
3. Guardhouse
4. Carriage House & Meeting Rooms
5. Tower
6. East Wing
7. Nickerson Mansion, Guest Registration & Meeting Rooms
8. Bayzo's Pub
9. Ocean Terrace Restaurant (indoor/outdoor)
10. Mansion Ballroom
11. West Wing
12. Bayside Fitness Center & Indoor Pool
13. Spa Treatment Room
14. Flyer for Hire Bike Shack
15. Bay Pines Tennis Facility
16. Bay Pines Outdoor Pool & Pavilion
17. Beach Path Entrance
18. Beach Attendant

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2019

SAVE THE DATES

2019 Technology Conference

Friday, October 25, 2019

AC Hotel by Marriott, Worcester, MA

2020 Annual Management Conference

Thursday, January 23 & Friday, January 24, 2020

Four Points by Sheraton, Norwood, MA

2020 Annual Meeting

Thursday, June 4 & Friday, June 5, 2020

Omni Mount Washington Resort, Bretton Woods, NH

STRATEGIC High-level sessions designed to build awareness and stimulate discussion about emerging industry, management, and leadership trends.

APPLIED Tactical sessions with tangible takeaways for those seeking to build their knowledge and experience in a variety of association management topics.

HANDS-ON Interactive sessions where you'll spend time learning from, and with, your peers.



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