



PROGRAM OVERVIEW

Module 1 – Organization Types & Management Structures

Bob Harris, CAE; Non-Profit Center

Learn about the historical role of associations, what 501(c)___ means, and how associations are structured and governed

- Role of Associations & Historical Principles (1776-Present)
- Difference between various 501(c) orgs
- Strategic Planning & Formal Process
- Chapters, Federations & Affiliations
- The Governing Documents

***Bob Harris, CAE** works with thousands of organizations to improve performance and outcomes. He believes nonprofit organizations should be as efficient and effective as any commercial business or franchise. Bob provides free tips and templates to make governance and management efficient at www.nonprofitcenter.com.*

Module 2 - Ethics in Associations

Shawna Strickland, PhD, CAE; American Epilepsy Society

Explore ethical leadership in associations, apply a decision-making framework, and understand codes of ethics and ASAE standards

- Identify the role of ethics in associations
- Discuss the importance of ethical leadership
- Outline the ASAE standards of conduct
- Identify and apply an ethical decision-making framework
- Discuss codes of ethics and the impact of ethics audits

***Shawna Strickland, PhD, CAE**, is the Chief Learning and Engagement Officer at the American Epilepsy Society. She has over 12 years of association leadership experience as well as 25 years of higher education experience, focused on health care, leadership, and ethics. Dr. Strickland is also an adjunct faculty member at Rush University, teaching leadership and education courses in the Doctor of Philosophy in health sciences program. She can be reached at sstrickland@aesnet.org.*

Module 3 - Board Governance & Volunteer Management

Lowell Applebaum, EdD, FASAE, CAE, CPF; Vista Cova

Understand the board and committee structure, what Good Governance is, managing volunteers and developing leaders

- Organizational Life Cycles
- What is Governance
- Structure & Responsibilities of the Board of Directors
- Minutes & Documentation
- Committees and Responsibilities
- Volunteer Recruitment & Management
- Volunteer Leadership Development

Dr. Lowell Applebaum, EdD, FASAE, CAE, CPF, is the CEO of Vista Cova and an expert facilitator of strategy and governance, working with over 100 associations and nonprofits every year. Lowell is the author of the strategy for the latest edition of Professional Practices in Association Management and frequently facilitates CEO roundtables for FSAE and many other state societies. He can be reached at Lowell@vistacova.com.

Module 4 - Financial Management, Audits & Budgeting

Allison Harrell, CPA; Thomas, Howell, Ferguson CPA

Learn key components of preparing for an audit, separation of duties, financial statement analysis, and budget development

- Internal Control Systems: Reducing Your Risk of Fraud
- Separation of Duties, Financial Policies & Practical Solutions
- Financial Statement Analysis and Ratios
- Budget Development

Since 2002, Allison Harrell, CPA has offered assurance services to governmental, not-for-profit, and for-profit entities. Achieving shareholder status in the Thomas Howell Ferguson CPA firm in her early thirties, Allison has become a trailblazer for accounting professionals on a fast track. Learn more at www.thf.cpa.

Module 5 - Administration & Human Resources (HR)

Bennett Napier, MS, CAE; Partners in Association Management

Explore vendors, contracts, employees, self-management or management company and social responsibility

- Contracts: Vendor/Supplier Management
- Key Areas of Insurance
- Outsourcing Services
- Association Documentation & Retention
- Employee Contracts & Handbooks
- Employee Policies & Performance Reviews

- Self Manage or Management Company

Bennett Napier, CAE is President/CEO of Partners in Association Management. He has worked in association management for over thirty years. He has been named one of Florida's Most Influential Business Leaders by Florida Trend Magazine for eight years in a row. He can be reached at bennett@executiveoffice.org.

Module 6 – Legal Issues in Associations

Legal Part I – Legal Issues & Risk Management – Bob Harris, CAE; Non-Profit Center

Understand anti-trust, volunteer immunity, authority to speak, conflicts of interest, risks and more

- Anti-Trust
- Insurance & Risk Management
- Volunteer Immunity
- Authority to Speak
- Conflicts of Interest
- Public Records

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Legal Part II: Employment Law Updates – Linda Bond Edwards, Esq.; Alvarez Dispute Resolution

- Employment Law & Discrimination
- Retaliation
- Compliance

Linda Bond Edwards, Esq. is a seasoned employment law attorney. After thirty years of employment litigation in state and federal courts, mainly representing public and private employers, she now devotes her time to helping others resolve employment and other disputes as a mediator and arbitrator. She can be reached at ledwards@alvarezdisputeresolution.com

Module 7 - Communications & Crisis Management

Heidi Otway APR, CPRC; SalterMitchell PR

Understand the principles of marketing, branding, public relations, crisis communication and privacy

- Strategic Communication Planning & Research
- Effective Communications for Generations in the Workplace

- Communications Tactics
- Branding and Messaging
- Crisis Management and Crisis Communication
- GDPR Considerations / Member Privacy

*Decades of experience have solidified **Heidi Otway, APR, CRPC** as an expert in all aspects of media, strategic communications, marketing, and audience engagement. She has led numerous public relations and public affairs initiatives, managing the reputations of top organizations. For every client and cause, she relentlessly pursues results that help them succeed. She can be reached at Heidi@smp Florida.com or 850-681-3200*

Module 8 - Marketing & Social Media

Michael Winn, RBOA Digitally Driven Marketing

Learn best practices for building community through social media and digital tools

- Creating Your Plan for Success
- Identifying Your Community
- Developing Content and Marketing Strategies
- Digital Marketing and Online Ads
- Reaching & Engaging Your Community
- Using Your Website Effectively
- SEO – Search Engine Optimization
- Data Analytics

***Michael Winn** is the CEO of RBOA Digitally Driven Marketing, a results-focused agency specializing in SEO, website design, social media, and video production. With over a decade of leadership experience, he partners with businesses, nonprofits, and associations to build powerful digital strategies that drive measurable growth. He can be reached at mwinn@rboa.com.*

Module 9 – Membership Recruitment, Engagement & Retention

Membership Part I: The Keys to Membership Recruitment & Retention - Tom

Morrison, Metal Treating Institute

Learn the keys to member recruitment, engagement, retention, developing value propositions, and member benefits

- Keys to Recruitment, Engagement & Retention
- Value Proposition Development
- Member Categories
- Benefits vs Features
- Member Research

***Tom Morrison** is an accomplished association executive with over 30 years of leadership experience, having served as CEO for three organizations, including the Metal Treating Institute, where he has driven*

over 4,000% growth since 2006. His success stems from a strategic focus on innovation, member value, and navigating industry disruption to strengthen association impact and engagement.

Membership Part II: Reimagining Member Value - Avi Olitzky, Olitzky Group Consulting

- Membership through Generational Shifts
- Membership as an Experience
- Member Engagement & Relations
- Rethinking Value
- Benefits vs Features
- Membership Models

Avi S. Olitzky is President and Principal Consultant of Olitzky Consulting Group, specializing in strategic planning, governance, and membership and alternative revenue models for associations and nonprofits. A sought-after speaker and facilitator, Avi brings decades of leadership experience and a passion for helping organizations create meaningful impact. He can be reached at avi@olitzkyconsulting.com or www.olitzkyconsulting.com.

Module 10 - Meetings, Conference, Trade Shows

Aaron Wolowiec, FASAE, CAE, CMP Fellow; Event Garde

Gain insight on meeting contracts, sponsor development, site selection, program development, committee vs staff driven and risk management

- Strategic Meeting Development
- Key Factors in Site Selection
- Meeting Contracts & Negotiations: Essential Components
- Sponsorship Development: Maximizing Sponsor ROI
- Planning & Implementation: Budgeting & Streamlining Processes
- Event Logistics: F&B, Rooms & AV
- Sustainability & Going Green
- Risk Management, Safety & Crises
- Future-Proofing Meetings & Events

Aaron D. Wolowiec, FASAE, CAE, CMP Fellow is a nationally recognized meeting strategist, facilitator, and learning designer with more than two decades of association experience. As the founder and president of Event Garde, he specializes in creating engaging, multisensory learning and networking experiences. A certified Technology of Participation facilitator and mentor trainer, Aaron prioritizes participatory and equitable approaches to consensus building and strategic planning. He can be reached at aaron@eventgarde.com.

Module 11 - Non-Dues Revenue: Fueling Mission, Member Value, and Financial Sustainability – Teri Carden, *Non-Dues Revenue Enthusiast*

Learn the keys to developing non-dues revenue programs, measuring success, delivery systems and more

- Understanding Non-Dues Revenue and Why it Matters
- Identifying Potential Revenue Streams
- Strategic Considerations: Align with Member Needs
- Start Small & Simple and Build with Intention
- Finance, ROI and What Success Looks Like
- Governance, Finance & Ethics: Program Risk Management, UBIT, Sustainability, & Transparency

Teri Carden is a tech-savvy entrepreneur and association industry veteran known for launching innovative platforms like ReviewMyAMS, Non Dues-a-Palooza, and AMS Fest. She currently serves as the VP of Marketing & Client Success at Insight Guide, where she helps associations and solution providers connect meaningfully through smart marketplace technology. She can be reached at Personal: teritally@gmail.com or Professional: teri@Insightguide.com

Module 12 - Effective Advocacy: Public Policy & Government Relations Steve Vancore, *Vancore Jones Communications*

Gain insight into advocacy, lobbying, coalition building, grassroots development and PAC funding

- The Value of Advocacy: Building Relationships & Effective Communications with Public Officials
- Grassroots Efforts and Harnessing Your Members
- Allies & Coalition Building
- Lobbying (State vs Federal)
- Donations / PAC Funds and Reporting Requirements

Steven J. Vancore is the President of VancoreJones and Clearview Polling and Research, LLC. Throughout his career, he has coordinated scores of strategic communications, political and public relations campaigns, served as the political director of a major statewide association, and has represented and continues to represent some of Florida's largest and most influential businesses and associations in the state. He can be reached at svancore@vancorejones.com or 850.528.4109.

Module 13 - Technology and Data Management

Kevin McNulty, NetWeave Social Networking

Learn about “AMSs” and member management systems, the cloud, working remotely, security issues and system compatibility

- Understand how to Select and Implement different Management Systems and Social Technologies
- Evaluate and understand Cloud vs. Onsite Server Solutions
- Mining Your Member Data a Developing Useful Reports
- Remote Work Tools
- Strengthen systems security and compatibility
- AI & Emerging Technologies
- Evaluate tech policies and conduct tech audits

Kevin McNulty is the co-founder and president of NetWeave Social Networking, a digital marketing agency based in Palmetto, Florida. He is also a professor of digital marketing at State College of Florida and a frequent speaker for professional associations, including a recent appearance at TEDx Bradenton. With a background in corporate training, U.S. Army service, and a degree from Cal State Fullerton, Kevin brings over 20 years of communication expertise to his roles. He can be reached at kevin@netweaveonline.com.



QAS 2.0 – the Qualified Association Specialist 2.0 on-demand certificate program can be found online at AssociationSpecialist.org.

QAS 2.0 is administered and created by the Florida Society of Association Executives (FSAE) and provided in partnership with numerous state SAEs. If you have any questions or need assistance, please contact events@fsae.org

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 2410 Mahan Dr., Ste 2, Tallahassee, FL 32308
 Call or Text: (850) 222-7994 | fsae@fsae.org