

2024 OSAP ANNUAL CONFERENCE

June 26-28, 2024

Northern Cincinnati

Sharonville Convention Center

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OHIO SOCIETY OF ASSOCIATION PROFESSIONALS

ANNUAL
CONFERENCE

2024

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The OSAP Annual Conference 2024 Schedule

Wednesday, June 26, 2024

1:30 - 2:30 P.M.	Exhibitor Showcase: Welcome to the OSAP 2024 Annual Conference!	
2:30 – 4:00 P.M.	Opening Keynote Session: Do You Even Know Me? How Curiosity Creates Community in the Workplace James Robilotta, The Story Matters	Northern Lights Ballroom
4:15 – 5:15 P.M.	Concurrent Session 1: Association Advocacy: Federal Tax and Workforce Legislation Jeff Evans, ASAE	Room 201
	Concurrent Session 2: Engage and Convert: Winning Marketing Strategies for 2024 Barb Burgie, Burgie MediaFusion	Room 202
	Concurrent Session 3: Ethics in Today's Nonprofit Environment; Maritza Nelson, Esq.; Law Office of Maritza S. Nelson, LLC	Room 204
5:20 - 6:15 P.M.	"New-Bees" Reception: This invitation-only reception is for first-time attendees of the conference.	Gallery's Outside Veranda
7:00 - 9:45 P.M.	OSAP Board Chair's Reception: <i>Open to all attendees, this event is a relaxed social event providing the opportunity to connect with other attendees in a fun-filled atmosphere. We hope you can join us.</i>	West Portune Hall

Thursday, June 27, 2024

7:00 - 8:30 A.M.	Breakfast (complimentary at your hotel – check front desk for times and locations)	
8:30 - 9:45 A.M.	General Session: Reinventing the Workplace: Lessons from the Bossholes John Broer, real.good.ventures	Northern Lights Ballroom
9:50 - 10:40 A.M.	Exhibitor Showcase Break	
10:45 - 11:45 A.M.	Concurrent Session 4: Cybersecurity for Your Personal and Professional Life; Ben Hunter, UHY	Room 201
	Concurrent Session 5: Demystifying AI Kendra Ramirez, KR Digital Agency	Room 202
	Concurrent Session 6: Emotional Intelligence Unleashed: Strategies for association leaders Lori Zoss Kraska, Growth Owl	Room 204
11:45 AM – 1:10 P.M.	The OSAP Foundation Lunch	

1:15 - 2:15 P.M.	<p>Concurrent Session 7: PCI Compliance Mark Hayward, Aperia</p> <p>Concurrent Session 8: The Election Year Economy: What's important to know for your association's mission and your investments Jim Saling, Saling Simms Associates</p> <p>Concurrent Session 9: How Healthy Are Your Members? Why the physical, mental and financial health of your members matters to the long-term growth of your organization Timothy McNichols, LIG Solutions</p>	<p>Room 201</p> <p>Room 202</p> <p>Room 204</p>
2:30 - 3:30 P.M.	<p>Concurrent Session 10: Fostering a Culture of Care: Retaining talent while impacting a life One OSAP member's journey Jacob Mauch, Hyatt Regency Columbus</p> <p>Concurrent Session 11: Generations & Talent Retention: The assumptions we make and the steps we must take Tiffany Crosby, Ohio Society of CPAs</p> <p>Concurrent Session 12: Conversations That Connect: Understanding the How and Why of Workplace Conversations Geoff McLachlan, Professionals at Play</p>	<p>Room 201</p> <p>Room 202</p> <p>Room 204</p>
3:45 – 5:00 P.M.	<p>General Session: Five Keys to Maintain Balance & Ignite Momentum; Janine Stange, National Anthem Girl</p>	<p>Northern Lights Ballroom</p>
5:00 – 5:45 P.M.	<p>Exhibitor Showcase Reception</p>	<p>Northern Lights Ballroom</p>
6:30 P.M.	<p>Depart For Evening Activities <i>Presented by Visit Cincy</i></p>	
<p>Friday, June 28, 2024</p>		
7:30 - 8:30 A.M.	<p>Exposition Morning Coffee Break</p>	<p>Northern Lights Ballroom</p>
8:30 - 9:30 A.M.	<p>Concurrent Session 13: Building Workplace Culture in a Hybrid Environment; Cathleen Snyder, Clark Schaefer Strategic HR</p> <p>Concurrent Session 14: The Benefits of Becoming a Sustainable Organization; Ryan Mooney-Bullock, Green Umbrella</p> <p>Concurrent Session 15: Tell Better Stories: Speak Up, Stand Out, Build Community Megan (Meg) Adams, Ph.D., Homeplace Creative</p>	<p>Room 201</p> <p>Room 202</p> <p>Room 204</p>
9:30 - 10:30 A.M.	<p>Conference Brunch <i>Presented by the Sharonville Convention Center</i></p>	<p>Northern Lights Ballroom</p>
10:30 AM - 12:00 P.M.	<p>Closing Keynote Session: The Power of Play! Geoff McLachlan, Professionals at Play</p>	<p>Northern Lights Ballroom</p>



2024 ANNUAL CONFERENCE

EDUCATIONAL SESSIONS

OPENING KEYNOTE SESSION: WEDNESDAY 2:30 – 4:00 PM



Do You Even Know Me? Curiosity Creates Community

James Robilotta

Speaker, author, comedian

Story Matters

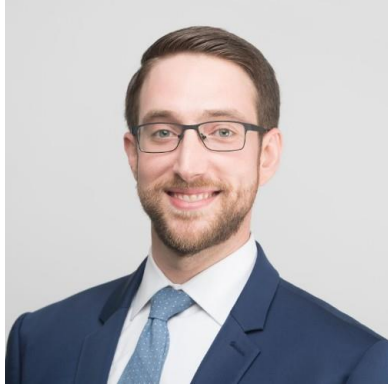
Location: Northern Lights Ballroom

No organization wants its people to be apathetic—toward the work, the people or the community. Community ignites loyalty and drives retention in both in-person and hybrid workplaces; it is built with one simple thing: curiosity. Curiosity is the opposite of apathy. Events are ideal opportunities to authentically connect, reflect, validate and innovate.

In this hysterical and motivational keynote, participants will learn about:

- Methods to employ to learn how to ask better questions.
- Tips on how to change the way we hear people's stories and insights.
- Exercises to utilize that help us adapt a better mindset of curiosity.

Let's stop the apathy and the assumptions and start learning about each other because curiosity creates community.



Association Advocacy: Federal Tax & Workforce Legislation

Jeff Evans

Public Policy

American Society of Association Executives

Location: ROOM 201

The future of policymaking could look very different depending upon which candidate captures the bid for presidency and which party retains or gains power in the upcoming election. In 2025, policymaking around tax issues and workforce development will be in overdrive.

Associations are well-positioned to advocate for a stronger economy.

In this session, participants will:

- Learn insight from ASAE public policy staff regarding the tax policy horizon.
- Receive insights into the dynamic legislative efforts that will help increase access to career-building credentials
- Gain a better understanding of how they can communicate this information to those in their organizations



Engage and Convert: Winning Marketing Strategies for 2024

Barb Burgie

President & founder

Burgie MediaFusion

Location: ROOM 202

In today's dynamic digital landscape, capturing audience attention and building engagement among members is a strategic blend of marketing and social media tactics. As we navigate 2024, new trends are emerging, and members' expectations continue to evolve.

In this presentation, participants will:

- Become equipped with the essential best practices to thrive in this ever-changing environment.
- Delve into understanding your audiences, crafting compelling content and engaging your members.
- Learn how to harness the latest marketing and communications tools and technologies.

Get ready to unlock valuable insights to elevate your marketing strategies and propel your association towards success in 2024!

CONCURRENT SESSIONS: WEDNESDAY 4:15 – 5:15 PM



Ethics in Today's Nonprofit Environment

Maritza Nelson, Esq.
Attorney-at-law

Location: ROOM 204

The Law Office of Maritza S. Nelson, LLC

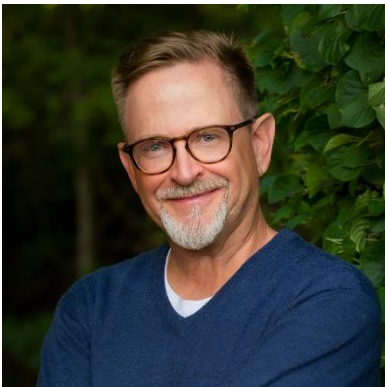
In today's world, transparency, the 24/7 news cycle and the ability for anyone to become an "expert" on anything in which they want to call themselves an expert have impacted how organizations are often viewed. Statistical information states that many people believe nonprofit organizations more than they believe for-profit entities. What this means is, associations are better positioned to be honest, to be ethical and to remain steadfast in defending their members' interests.

In this session, participants will gain a clear understanding of:

- The fundamentals of ethical behavior in today's nonprofit workplace.
- The value you can provide your various audiences in protecting, practicing and promoting ethical behavior.
- The importance of encouraging ethical behaviors in governance.

Ethics *should not* be a choice, and our speaker will explain why they cannot be a choice if you want your organization to thrive.

GENERAL SESSION: THURSDAY 8:30 – 9:45 AM



Reinventing the Workplace: Lessons from the Bossholes

John Broer
Principal, co-founder
real.good.ventures

Location: Northern Lights Ballroom

A shift in how we see the workplace started a while ago. The question that needs to be answered is, "Are you shifting with it?" All levels of the organization play a role in how the workplace is evolving; the shift requires everyone to think about how it needs to be reinvented.

In this session, participants will examine how the shift impacts:

- The front line to the front office.
- The individual contributor to the manager to those in the C-suite.
- Psychological safety and how it is about the soil and not the seed.

Additionally, participants will learn how the new workplace will look to alignment at all levels when it comes to execution.



Cybersecurity for Your Personal & Professional Life

Ben Hunter III, CPA/CITP, CISA
CRISC, CDPSE, CISM
Principal
UHY Consulting

Location: ROOM 201

Cybersecurity is in the news almost every day. Ransomware, data loss, breaches at large and small organizations, pig butchering, romance scams, elderly scams, phishing, BEC; it goes on and on. However, there are some simple and not so simple ways to introduce “friction” into your digital habits that will protect your life.

In this session, participants will gain a clear understanding of:

- How to recover from ransomware attacks.
- How to apply phishing prevention tips and personal security methods (digital and in real life).
- Steps you can take in your life to protect your business, yourself and your family.

The threats cybersecurity poses are real, and more organizations need to be prepared for what could happen when - *not if* - they fall prey.



Demystifying AI

Kendra Ramirez
CEO
KR Digital Agency

Location: ROOM 202

In this session, participants will learn about the potential of artificial (AI) technology to drive business growth, increase efficiency and drive innovation. Our speaker will provide an overview of AI; highlight real-world implementation cases of how businesses are leveraging AI while sharing pitfalls of AI and the essential AI tools to use.

Here are some takeaways that participants will gain:

- Understanding the basics of AI technology and its impact on the business landscape.
- Identifying the different applications of AI in businesses and their potential benefits.
- Considering things about which they must be careful when implementing AI in their business.

Additionally, participants also will have the opportunity to engage in interactive discussions, gain insights, and get their AI questions answered.

CONCURRENT SESSIONS: THURSDAY 10:45 – 11:45 AM



Emotional Intelligence Unleashed: Strategies for Association Leaders

Location: ROOM 204

Lori Zoss Kraska, MBA, CFRE
CEO & founder
Growth Owl, LLC

This dynamic 60-minute session empowers high-level executives with practical insights and strategies to integrate emotional intelligence into decision-making, conflict resolution and team dynamics.

Participants in this session will walk away with these learning objectives:

- The ability to define the five key components of emotional intelligence (self-awareness, self-regulation, motivation, empathy and social skills).
- The skills to learn how to apply emotional intelligence into leadership.
- The ability to examine ways to cultivate a culture of emotional intelligence in your association.

Attend, listen and transform your leadership approach and foster a positive, collaborative organizational culture for lasting success.

CONCURRENT SESSIONS: THURSDAY 1:15 – 2:15 PM



PCI Compliance

Location: ROOM 201

Mark Hayward
Senior VP, Sales (Compliance, Risk & Security Solutions)
Aperia Solutions

In today's world, card data is a favorite target for cybercriminals because the attacks have typically been easy to conduct, and the rewards can be high. Massive data breaches in companies like *Facebook* and Target have proven that important financial data needs to be protected. That is one of the reasons the largest payment card providers created the Payment Card Industry Data Security Standard (PCI DSS) in 2014. This set of 12 requirements outline the security measures businesses must take

when processing card payments.

During this session, participants will learn:

- What organizations gain from being PCI-compliant.
- What can happen if they do not comply with the standards.
- What protections and peace of mind PCI compliance bring to members and brand reputation.

Hayward will also touch on other topics related to PCI compliance and how they can impact nonprofit and for-profit operations.



The Election Year Economy: What's Important to Know for Your Association's Mission & Your Investments **Location: ROOM 202**

Jim Saling, CIMA, CPWA, CPFA, AIF
President
Saling Simms Associates

Are we headed for a recession? Are we in a recession? Do presidential elections affect the economy? What are the talking heads saying about the state of the U.S. economy? Are we affected by the global economy?

Noted Speaker Jim Saling, CIMA, CPWA, CPFA, AIF, walks you through the jungle of information about the economy to help you determine what is important for you, your association's mission and your investments.

In this session, participants will learn valuable information related to:

- What you need to know if you currently sit or have sat on a finance committee
- What insights you should be sharing with your board to frame your investment landscape for the coming year.
- What you as an individual investor want to understand about the current economy.

Saling will also note the perspectives you should have to take the sting out of the nightly news and to put your mind at ease. If any of these points spoke to you, you should not miss this session!



How Healthy are Your Staff & Members? Why the Physical, Mental & Financial Health of your Employees and Members Matters to Your Organization's Long-term Growth **Location: ROOM 204**

Timothy McNichols
Executive Director, Partnership
LIG Solutions

Are physical, mental and financial health related? Why should you be concerned about this for your employees and members? It matters more than you might realize.

Participants in this session will explore:

- How these three important topics interact.
- Whether they can impact an organization's productivity, engagement, safety and culture.
- How tools and resources can be used to help your employees and members to ensure they are physically, mentally and financially healthy.



Fostering a Culture of Care: Retaining Talent While Impacting a Life – one OSAP member’s journey **Location: ROOM 201**

Jacob Mauch
Group Sales Manager
The Hyatt Regency Columbus

The foundation of any successful organization lies in its people and the fostering of a culture of care that prioritizes the well-being, growth and development of its employees.

This is paramount in today's competitive landscape.

In this session, participants will learn about:

- An OSAP member’s personal journey through addiction and recovery.
- The valuable role his employer’s culture of care afforded him and his family.
- How organizations can implement similar practices to ensure they are caring for their staff members.



Generations & Talent Retention: The Assumptions We Make and the Steps We Must Take **Location: ROOM 202**

Tiffany Crosby, CPA, CGMA, MBA
Chief Learning Officer
The Ohio Society of CPAs

Finding and retaining talent continues to be a challenge. However, there is untapped talent out there that is often overlooked at best or completely discounted at worst, due to assumptions we make.

In this workshop, participants will learn how:

- Organizations that build cross generational workforces benefit from increased creativity and skill diversity.
- Diverse organizations experience improved employee engagement, retention and knowledge transfer.
- Multi-faceted organizations also have greater internal and external connectivity.

CONCURRENT SESSIONS: THURSDAY 2:30 – 3:30 PM



Conversations That Connect: Understanding the How & Why of Workplace Conversations

Location: ROOM 204

Geoff McLachlan

Professional problem solver, speaker and motivator
Professionals at Play

Connection is the main objective of this training from an industry-leader presenter and “professional at play.” He will highlight how it does not have to be lonely at the top. He will share insightful methods to build connections through valuable conversations and drive the health of your team through powerful workplace conversations.

In this session, participants will learn:

- How connecting conversations between one another can create breakthroughs.
- How powerful, purposeful conversations can help us learn from one another while strengthening our teams.
- How breaking down the “trust barrier” first will lead to long-lasting relationships on teams.

According to McLachlan, one of the quickest ways to build trust is to find something in common and then share your story. It really is that simple. This training will be instantly usable for yourself and your teams.

GENERAL SESSION: THURSDAY 3:45 – 5:00 PM



Five Keys to Maintain Balance & Ignite Momentum

Janine Stange

Location: Northern Lights Ballroom

Motivational speaker and inspirational vocalist
The National Anthem Girl

Through her inspirational keynote, Stange shares her own story of triumph over adversity as she encourages individuals and organizations to discover their unique purpose and to “rise up” in the face of disruption. Audiences learn how self-reflection and a commitment to personal growth can help us turn suffering into strength. By giving back to others, she asserts that we can transform any tragedy into greater triumph.

She will share her proven five-step “Momentum Mindset” framework for staying focused and moving forward during disruption.

Participants in this general session will discover how they can:

- Embrace their unique talents to find clarity of purpose while making courageous choices that align with strategic goals.
- Remove obstacles and accelerate growth while rallying teams around a shared vision.
- Transform challenges into opportunities that benefit them both professionally and personally.



Building a Workplace Culture in a Hybrid Environment

Cathleen Snyder, SPHR, SHRM-SCP
Director of HR & Development
Clark Schaefer Strategic HR

Location: ROOM 201

With hybrid or remote the norm for many organizations, it continues to be a challenge to maintain a strong culture. Leaders have had to adjust and adapt – not always willingly. Employees say they want flexibility to work remotely, at least some of the time, but then say they do not feel connected to their organization and colleagues.

In this session, participants will examine:

- Ways to build a workplace culture in hybrid environments.
- How to create better connections with their colleagues despite less interaction.
- Techniques that allow for flexibility without impairing relationships in today's workplace.



The Benefits of Becoming a Sustainable Organization

Ryan Mooney-Bullock
Executive Director
Green Umbrella

Location: ROOM 202

During the past 20 years, Ryan Mooney-Bullock has worked in science, environmental education and environmental policy. A seasoned program manager, educator and communicator, she is most energized when helping people make connections between their passions and what is going on in the natural and human worlds around them.

During this session, she will provide participants insights into how they can:

- Implement climate and environmental practices that guide their organization in a more holistic, world-conscience manner.
- Uncover lifestyles that are fitting for leaders of organizations that are committed to creating a resilient, sustainable region for all.
- Improve Ohio's and the surrounding region's environmental health.

CONCURRENT SESSIONS: FRIDAY 8:30 – 9:30 AM



Tell Better Stories: Speak Up, Stand Out, Build Community

Megan (Meg) Adams, Ph.D.
Co-founder
Homeplace Creative

Location: ROOM 204

This presentation illustrates how by cultivating a storytelling mindset, we can become empowered to share our own stories, actively listen to others, and, ultimately, create communities that thrive on shared experiences.

As a former television journalist turned professor, Adams possesses more than 10 years of experience telling and researching how stories impact community. Her TEDx Talk, “How Storytelling Shifts Perspective,” recounts how her own perspective changed working alongside community storytellers in Appalachia and prompts audiences to think about how the stories they tell affect their behavior towards others.

During this presentation, participants will discover:

- How revealing personal stories can shape our perspectives and actions.
- How storytelling can bridge divides by fostering empathy, expanding perspectives and nurturing authentic relationships.
- How this skill provides a tangible path to building stronger, more inclusive communities that celebrate our collective humanity and lead to increased creativity and innovation.

CLOSING KEYNOTE: FRIDAY 10:30 – 12:00 PM

The Power of Play!

Geoff McLachlan
Professional problem solver, speaker and motivator
Professionals at Play

Location: Northern Lights Ballroom



During his closing keynote, McLachlan will delve into the joy and wonder of play! Not only will it be discussed, we will actually use simple activities (low-risk activities: think handshakes and high fives) to engage with fellow participants and to open our minds to the possibilities of using play in the workplace

Participants will walk away feeling:

- Ready for improved engagement, better mental health and higher profits.
- Motivated to take on new engaging interactions with their staff members.
- Prepared to move their organizations forward.

McLachlan will be giving away a copy of his ebook, *The Golden Rule Playbook*, with activities that can be used in the workplace.