



TRILLIUM

15th Annual 2020 Summer Summit

Education Program (as at April 30th)

KEYNOTE SESSIONS

Stabilizing and Restoring Your Workplace as it Recovers From COVID-19

Businesses across Ontario have been radically altered by the COVID-19 outbreak. From closures and layoffs to work refusals and terminations, they have been forced to abruptly change the way they deliver products and services. Many have seen their bottom-lines battered as they struggle to understand the future, while also grappling with how to reengage staff and adjust to the new way of doing business in their industry. That's why embracing a proactive approach to risk mitigation, and moving from reactive to strategic decision-making, is so important for business owners, managers and HR professionals as we emerge from this unprecedented crisis.

Presented by Laura Williams, Founder, Williams HR Law

Crisis Communications: What to Say at the Worst of Times

Bad things can happen to good people. A sudden, unexpected crisis can be devastating to any organization or individual. Sean brings a wealth of experience as both a communications consultant and award-winning journalist to give an enlightening, essential presentation on crisis communications. He gives an entertaining talk about some of the headline-making stories he has covered, with examples of good and awful crisis communications and he provides practical advice on how to avoid the pitfalls and to prepare for a day that we all hope never happens.

Presented by Sean Mallen, Principal, Sean Mallen Communications Inc.

Risk Management and Your Event Contract - Learnings from COVID-19

One-sided indemnification, termination and cancellation clauses can be threatening for event hosts! Event contract clauses that shift financial risks and logistical burdens to event hosts, are often misunderstood and therefore poorly negotiated. Knowing the right questions to ask to strike balance is essential to protecting your event and your association! This workshop explores what might be encountered in event contracts and how to successfully negotiate critical clauses to achieve a balanced outcome. Using case studies and peer-to-peer learning, we will tackle what executives need to know to create peace of mind, contain costs, reduce risks and ensure thorough logistics – all setting the stage for successful events!

Presented by Heather Reid, Founder and CEO, Planner Protect Inc.

Alexa Is Stealing Your Job

Artificial intelligence is taking over our lives. Ask Alexa to call a client or confirm your schedule for the day, and Alexa will do just that immediately. Ask her a question, give her a command, or just share a joke together, and she becomes your new best employee. Is Alexa stealing YOUR job? Find out what skills are needed in this new paradigm. Find out what you need to do to become invaluable at your association and what your association needs to do to become invaluable to its members. Don't assume that what got you here will get you there.

Presented by Rhonda Scharf, On the Right Track – Training & Consulting Inc.

CONCURRENT SESSIONS

Learnings from COVID 19: Contracts, Force Majeure, and Governance Document Preparedness

What happens when you can no longer hold a conference? Your AGM? How can you navigate the provisions of your venue contract? What are the consequences of cancelling or terminating? What should you make sure is in that contract for the future? What if you need to move a board meeting or a members' meeting? What can your governance documents say to provide some flexibility in the holding of meetings?

There are many things we can learn from our collective recent experiences with managing in the face of a crisis, such as COVID-19. This session will focus on some of the legal ones.

Presented by Victoria Prince, Partner, Borden Ladner Gervais LLP

Those Are My People.

To create a sense of belonging, one community of practice reinvented its strategy, redesigned its structure and refreshed its brand. Dismantling a 10-year-old section that supports over 9,000 members required the College of Family Physicians of Canada (CFPC) to look backward in order to mark the way forward. The Member Interest Groups Section (MIGS) has 19 Member Interest Groups that connects family physicians from across Canada based on their professional interests. At risk of outgrowing its original mandate, the MIGS reinvented itself while preserving the experience of members who identified with the Section in its original form. The MIGS did this in three ways: they removed a tiered system, went digital and changed their name. This session is about their transformation journey.

Presented by Lily Oeur, Manager, Practice Support Programs, College of Family Physicians of Canada

CNCA 10 Years In: Lessons Learned and Pitfalls to Avoid

Since the coming into force of the Canada Not-for-profit Corporations Act in 2011, federal membership based corporations have been operating under the new corporate governance rules in the CNCA. Some of the rules have been challenging to deal with. This presentation is an overview of some of the challenges faced by associations in dealing with the CNCA Act, and a survey of various situations involving CNCA provisions. Examples include when class votes are required and how to conduct them, difficulty with proxy votes, electronic voting issues, delegate voting, simple majority is not the same as 50% plus 1.

Presented by Terry Carter, Managing Partner and Theresa Man, Partner, Carters Professional Corporation

Crisis Marketing: How to Recover the Customers and Revenue Taken by COVID-19

Your company won't survive the coronavirus if it's perceived as opportunistic and icky. But you will thrive by being truly helpful. Your customers need you and your company more than ever, and you need them!

As the coronavirus ravages stock markets and the economy, your company needs fast, aggressive marketing strategies to find new customers, revenue and cash. And the way you will do that is by being helpful:

- Who needs your company and its expertise the most right now?
- What products or services can you deliver to solve real problems that are valued?
- How can you proactively sell and deliver your services to the people with the most need?

Presented by Jeremy Miller, President, Sticky Branding

Retaining and Growing Membership in Today's *Un-Social* Climate

Attracting and retaining members and volunteers is becoming a growing challenge for today's associations. Everyone seems so busy, and with many corporations pulling back on funding association membership, the barriers and objections only seem to grow. It's no longer about "how much will this membership cost", but rather "how much time will this involve". The value for money has been replaced with value for exchange of time. We will discuss the proven strategies to attract members despite their lack of time, and then engage and retain them for the long-term.

Presented by Shawn Casemore, Professional Speaker

Association Sponsor Panel: "Behind the Curtain: An Inside Look at Sponsor Decision-Making"

What do association sponsors want? What do they really, really want? Join Erin and a panel of long time association sponsors to hear firsthand what attracts them to a sponsorship opportunity. Learn how to think critically about your association's sponsorship opportunities and better manage sponsor expectations.

After attending this session, participants will be able to:

- understand the sponsor's approach to choosing a sponsorship opportunity;
- think critically about their association's sponsorship offering and identify areas of improvement; and
- implement new strategies to create better and longer sponsor relationships.

Presented by Erin Roberts, Partner, Zzeem

Building an Effective Compensation Plan in the Association Sector

Your board wants you to present a compensation plan for your staff, but you are faced with a confusing set of data to make the plan. Not sure where to start? In this session, we will explore what drives compensation in the association and not-for-profit sectors and how to develop a compensation plan that will attract and retain great employees. We will point to tools and resources available to tackle a design project with internal resources. This session will explore:

- The environment of compensation in 2020;
- Primary drivers of your organization's market (what you need to pay to be competitive);
- Resources available to benchmark compensation and how to determine what is most relevant to your circumstances;
- Elements of an effective compensation plan;
- Unifying all your tools to attract, retain, motivate, focus and align employees;
- The roles of the various parties; and
- Building a compensation plan from scratch, how to's and pointers.

Presented by Bonni Titgemeyer, Managing Director, The Employers' Choice Inc.

Tactical Project Management Without a Project Manager

In this session, we will explore strategies and tactics for managing projects without dedicated, full-time project staff. Some of the tactics explored will be an overview of free project software available for teams, project road mapping, and how work breakdown structures can be very useful for overworked teams. Included are high-level strategies for managing documentation. After attending this session, participants will be able to:

- define a project and how their team works with projects;
- recognize the supports needed to complete projects within their association or organization; and
- use the tactics provided to support their teams in project work.

Presented by Megan O'Neil, Principal Consultant, The Focus Company

Gender Inclusion and Diversity: Tactical Considerations for Events

Creating warm and welcoming experiences for all attendees at events is essential. This tactical conversation about gender diversity and inclusion at events is led by seasoned event planner Heather Reid of Planner Protect with first-voice experience being offered by her son Noah Reid, Student Coordinator of Pride Western at Western University. In addition to terminology and appropriate etiquette, considerations such as inclusive washrooms, registration forms, pronouns and language used from the stage will be discussed.

Presented by Heather Reid, Founder and CEO, Planner Protect Inc., and Noah Reid, Student Coordinator of Pride Western, Western University

Practical Strategies to Integrate Climate Considerations into your Association

We hear a lot about climate change... IPCC reports. Greta. Paris Agreements. It can be a lot to digest. And it can be overwhelming - personally, and organizationally. So, where and how do you start (or continue) to help your association to reduce greenhouse gases, adapt to a changing world, and/or manage risk? Why does it matter? This session will distill information about climate change into a series of practical steps for leaders via case studies. We will examine feasible and low-cost strategies that you can implement, with confidence, as soon as you get back to the office.

Presented by Amanda Kennedy, Owner, Kennedy Consulting

Top Ten Government Relations Mistakes Associations Make

Ron will, through lessons learned from years of experience within government and through countless government relations campaigns, will engage association professionals with the sometime comedic examples of the top ten mistakes that associations make in advocating their cause or issues. Through the examination of the incorrect tactics, ranging from typical to tragically failed attempt examples, participants will develop a fuller understanding of the correct strategies. The correct and practical takeaway tools and strategies will be explored in a group setting where the audience can take a crack at coming up with the right strategies.

Presented by Ron Ross, KWM Consulting

Please Visit Our Website (It Kicks A!): The CSAE Digital Revolution**

Online Membership engagement and empowerment is critical to the growth of associations. Expecting more from your organization's website is vital, but where to begin? Reduce the fear and confusion tied to getting started on large scale digital projects with practical insight from CSAE's own journey. Danielle and Rod will demonstrate that sometimes it just takes the will, a good partner, an action plan and the guts to take the first few steps on the journey to create a meaningful, brand building, member engaging digital hub!

Presented by Danielle Lamothe, VP, Learning and Innovation, CSAE, and Rod Zylstra, President, Industrial

Data Analytics – Enough Talk, How do I Get Started?

With the proliferation of data and emerging tools to analyze it, rapid external change and tight budgets, not-for-profit organizations have a great opportunity to leverage data to help more effectively and efficiently achieve their mission and vision. Not-for-profit organizations acknowledge the importance of data analytics for their future success but the misconception that significant investments of time and money is required to obtain value from data analytics leads many to hesitate to move forward. This session focuses on the scalability of data analytics and how not-for-profit organizations can use the information, tools and knowledge in their organizations today to obtain value from data analytics.

Presented by Danzel Pinto, Principal, and Eric Au, Leader, National Data Analytics Centre of Excellence, Grant Thornton

Empowering Employees: Motivating Your People Through High Performance Coaching

This session focuses on building effective feedback and coaching skills for Leaders and providing them with the foundation for managing people. We will provide an overview of the Leadership qualities which will help Leaders increase the frequency and quality of their performance conversations with their people. The role of a good Leader is to provide whatever it takes—goals, direction, training, support, feedback, and recognition—to develop employees' skills, motivation, and confidence to excel. The result of effective feedback and coaching is organizations where people feel more empowered, engaged, and open to new challenges.

Presented by Julie Ruben Rodney, Founder & CEO Organization, MaxPeople

Is Your Event Broken? What an Event Audit Can Tell You

Attendance is slipping, investors are looking for something more, your program design has been on repeat or your survey results aren't telling you anything you don't already know. Something is no longer working or perhaps it's just time to shake things up. The first step to decide what to do about it is a strategic Event Audit. Let's look at every factor that influences your event design and rebuild an experience that engages all your stakeholders and brings the WOWfactor.

Presented by Bettyanne Sherrer, CMP, CMM, Principal, ProPlan Conferences & Events

Lead On! Leadership Development

The number of NFP Chief Staff Officers (CSOs) and senior executives preparing to retire is surpassing the number of staff willing to step forward to fill these positions. Succession planning has become an obsession. But succession planning is not only about selecting the CSO – the one right person with the knowledge, skill set and experiences outlined in enshrined in every human resource file and policy documents. It is about LEADERSHIP development at all levels. We all have leadership skills, be they in organizational management, IT or statistics gathering. We have them at senior, middle and entry levels of employment. With successful leadership development, succession planning becomes a tacit by-product and a significant factor in the success of an association.

This case study will examine multi-faceted leadership development at the Motorcycle and Moped Industry Council and the Canadian Off-Highway Vehicle Distributors Council and their for profit subsidiaries Power Sport Services and Event Management Services.

Presented by Bob Ramsay, CAE, Motorcycle and Moped Industry Council, Canadian Off-Highway Vehicle Distributors Council, Power Sport Services and Event Management Services, and Oksana Buhel, CAE, Canadian Off-Highway Vehicle Distributors Council

How to Make Working Virtually Work For You (and Your Team!)

As technology connects us in ways previously unimaginable, the gap between the physical space and the proximity between our colleagues or those we serve within our associations continues to grow. Join us for a perspective from an association that has been working virtually for years, how we make it work without losing sight of our team, and what all of this means in this approaching post-COVID-19 era.

Presented by Ahmad Zbib, Chief Executive Officer, and Kevin Baijnauth, Marketing and Communications Coordinator, Canadian Rheumatology Association



www.case.com/networks/trillium

Tel: (637) 346-2723

admin@case-trillium.com

@CSAE Trillium