



TRILLIUM

In It to Win It

14th Annual CSAE Trillium Summer Summit
Conference Schedule and Education Sessions

July 10-12, 2019
Caesars Windsor
Windsor, ON



CAESARS
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CSAE Trillium Summits

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Wednesday, July 10, 2019

TIME	ACTIVITY
3:30 pm - 7:00 pm	Registration
4:30 pm - 5:30 pm	Workshop tbd
8:00 pm - 10:00 pm	“Welcome to Caesars” Social Activity

Thursday, July 11, 2019

8:00 am - 5:00 pm	Registration
8:00 am - 8:30 am	Breakfast
8:30 am - 10:00 am	Opening Remarks and Keynote Andrew Au, Digital Transformation, AI and Modern Leadership Expert sponsored by 
10:00 am - 10:30 am	Connection Break sponsored by 
10:30 am - 12:00 pm	Concurrent Workshop 1A: The Top Ten (Legal) Things Your Association Should be Thinking About in 2019 by Victoria Prince, Partner, Borden Ladner Gervais LLP Concurrent Workshop 1B: Reporting Must-Knows for Marketing Today. Five Things to Demystify Google Analytics by Christine Saunders, President, Halmyre Concurrent Workshop 1C: The Role of Good Governance in Achieving Organizational Excellence by Brad Quinn, Founder & CEO, Gary Simonsen, Vice President, tng and William Harrington, General Counsel, Canadian Real Estate Association Concurrent Workshop 1D: Embrace Your Inner Resiliency Ninja by Allison Graham, Resiliency Ninja Keynote Speaker
12:00 pm - 1:15 pm	Lunch
1:15 pm - 2:15 pm	Concurrent Workshop 2A: Do You Know Who is Managing Your Money? by Julie Brough, Executive Vice-President and Portfolio Manager, Logan Wealth Management Concurrent Workshop 2B: From Head Office to Home Office: Transforming Into a Virtual Organization by Shannon Bott, CAE, CMP, Executive Director Operations, Digital Health Canada Concurrent Workshop 2C: The Disruptive Forces of AI in Market and Behavioural Research by Erin Kelly, CEO, Advanced Symbolics Concurrent 2D: Mentorship for Today's Associations: How one association successfully grew its membership by engaging its young professionals by Constance Wrigley-Thomas, CAE, President and John Thomas, Marketing and Communications Director, Essentient Association Management
2:15 pm - 2:30 pm	Mini-Connection Break
2:30 pm - 3:30 pm	Concurrent Workshop 3A: Membership Engagement: A Millennials' Perspective by Chelsea Verbeek, Marketing & Membership Coordinator and Alicia Shipway, Exam & Membership Coordinator, Medical Laboratory Professionals' Association of Ontario Concurrent Workshop 3B: Machine Learning Beyond the Hype and Why Your Association Should Care? by Yousif Hassan, President, Innovexa Solutions Concurrent Workshop 3C: Your Annual Member Survey – Are You Looking Down the Road or in the Rear-View Mirror? by Gerald Bramm, President, Bramm Research Inc. Concurrent Workshop 3D: Bring Your Association Into the 21st Century of Finance by Laura Gay, Assurance Partner & Not-for-Profit Practice Leader Stern Cohen LLP
3:30 pm - 4:00 pm	Connection Break sponsored by 

Thursday, July 11, 2019

4:00 pm - 5:15 pm	<p>Concurrent Workshop 4A: A Tale of Two Professionals: How to Maintain Professional Relationships that Enable Success by Michael Grant, Director, Marketing & Communications and Christine Nielsen, CEO, Canadian Society for Medical Laboratory Sciences</p> <p>Concurrent Workshop 4B: Legal Check-Up: Top 10 Tips to Effective Legal Risk Management for NPOs & Charities by Terrance Carter, Managing Partner, Carters Professional Corporation</p> <p>Concurrent Workshop 4C: Creative Problem Solving by Ilana Stern, Senior HR Manager, Central Services & Training, MaxPeople</p> <p>Concurrent Workshop 4D: Leadership Responsibility & New Leadership Development by Bruce Mayhew, President, Bruce Mayhew Consulting</p>
6:30 pm - 9:30 pm	<p>Summer Summit Signature Networking Reception and Dinner Stand-Up Dinner, Beverages and Entertainment sponsored by</p> <div style="display: flex; justify-content: flex-end; align-items: center; gap: 10px;"> </div>

Friday, July 12, 2019

7:30 am - 8:00 am	Breakfast
8:00 am - 9:15 am	Lightning Talks
9:15 am - 9:45 am	<p>Connection Break sponsored by </p> <p style="font-size: small; text-align: center;">www.explorewaterlooregion.ca</p>
9:45 am - 11:15 am	<p>Concurrent Workshop 4A: Restoring the Workplace: #After the Investigation by Laura Williams, Founder, Williams HR Consulting and Williams HR Law</p> <p>Concurrent Workshop 4B: Association Advocacy in the Digital Age by Huw Williams, President, Impact Public Affairs</p> <p>Concurrent Workshop 4C: The Power of Engagement by Danielle Rocheleau, Vice President, Laridae</p> <p>Concurrent Workshop 4D: Staying Strategically AGILE by Danzel Pinto, Principal, Grant Thornton LLP</p>
11:15 am - 12:30 pm	Lunch and Closing Remarks

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14th Annual 2019 Summer Summit

Education Program

KEYNOTE SESSION

Andrew Au

Digital Transformation, AI and Modern Leadership Expert

- sponsored by Speakers' Spotlight

In the media and on stages around the world, Andrew shares his dynamic perspectives on leadership and emerging technology trends. Andrew is currently the co-founder of Intercept, a strategic management consultancy based in Toronto and Boston. He is also the President of Scopium AI, a healthcare startup developing a patented cognitive platform focused on improving patient care and reducing medical costs using artificial intelligence.

When companies like Microsoft, FedEx, and 3M want to accelerate their digital transformation journey, they call Andrew Au. Digital technology has set a new equilibrium for organizations — from how they engage their customers to how they motivate their employees to how they innovate their products and services. This is where Andrew excels — he brings both substance and style to navigating disruption and future-proofing organizations, powered by big data and transformative ideas. You will leave enlightened and eager to drive change.

Referred to by Forbes as a “millennial expert”, Andrew Au is a modern business leader who helps global blue-chip brands respond to the new culture and nature of work. Through his innovative work, he was the youngest person to be inducted into the Entrepreneurs Organization at the age of 22. Andrew is among the few Canadians to be named to Forbes’ 30 Under 30 list and has received over 35 domestic and international awards for business innovation and thought leadership.

CONCURRENT SESSIONS

Association Advocacy in the Digital Age

Huw Williams will present on why associations need to take advantage of digital tools available to help bolster their advocacy work, how digital advocacy compares to traditional advocacy, and how the 2019 election will be different than any other. He will discuss a variety of case studies that showcase the rapid pace of change we have seen over the past decade. This will include how to approach organic vs. paid engagement, and political applications for business marketing and advertising.

Presented by Huw Williams, President, Impact Public Affairs

Restoring the Workplace: #After the Investigation

Dealing with workplace harassment and sexual harassment has become increasingly challenging and risky for employers. The awareness of high-profile cases, #MeToo movement activity, enhanced legislative protections and expanded employee entitlements have emboldened those experiencing and observing this misconduct to bring their issues forward resulting in an increasing number of investigations being conducted. Most organizations are unprepared for the destabilizing impact an investigation can have on engagement, morale and workplace culture. Using case studies to set the context, attendees will:

- Consider the impact of investigation on the workplace;
- Examine the complexities of workplace harassment and sexual harassment complaints and incidents;
- Discuss practical strategies and methods to effectively set conduct expectations within the workplace to proactively mitigate harassment-related risks; and
- Explore methods to contain the negative impact of an investigation on workplace culture and the steps that can be taken post-investigation to restore adverse effects on morale and culture.

Presented by Laura Williams, Founder, Williams HR Consulting and Williams HR Law

Reporting Must-Knows for Marketing Today: Five Things to Demystify Google Analytics

This session will focus on the five keys that will demystify Google Analytics (GA) for not-for-profit organizations and associations. The goal of this session is to empower all associations to ask simple questions about having the right GA setup. This is one of the most under-utilized yet cost-effective tools to drive actionable insights for organizations of any size. This session will translate Google Analytics into business terms that ‘non-techies’ can understand.

Presented by Christine Saunders, President, Halmyre

The Top Ten (Legal) Things Your Association Should be Thinking About in 2019

This session will focus on the ever-changing legal and governance framework and what associations and their executives need to know. And it is not all about the law – there is increasing interaction with business, social media, demographic shifts and many other factors. How do you stay on top of all you need to know?

Presented by Victoria Prince, Partner, Borden Ladner Gervais LLP

From Head Office to Home Office: Transforming Into a Virtual Organization

Why did Digital Health Canada, a Toronto-based professional association, make the decision to move to a virtual office? How was the transformation achieved? This session will use a recent real-world workplace transformation to explore how to successfully make the transition from bricks and mortar to a virtual organization, with tips, tools, and proven advice. Attendees will review a checklist for a successful transition; discuss technology and human factor requirements, including how to motivate and connect virtual staff members; and learn how to keep a busy association running smoothly before, during, and after the transition to a new virtual environment.

Presented by Shannon Bott, CAE, CMP, Executive Director Operations, Digital Health Canada

Leadership Responsibility & New Leadership Development

What Kind of Leader Do You Want To Be? With four generations in the workplace and Millennials moving into leadership roles, management styles are changing. Attendees will learn what leadership means in today’s busy business environment including exploring what it means to be a supportive, inspirational leader / coach while also consistently producing positive results.. It requires critical soft skills and effective communication to lead and inspire a cohesive, loyal and productive team.

Presented by Bruce Mayhew, President, Bruce Mayhew Consulting

A Tale of Two Professionals: How to Maintain Professional Relationships that Enable Success

Relationships are key to an association's success but strong relationships don't just happen. The Canadian Society for Medical Laboratory Science has enjoyed success with its marketing and communications program, winning several international awards. This success has been enabled by the working relationship between the CEO and the Director of Marketing & Communications. But this doesn't always come easy. As a CEO, how do you manage risk, Board expectations and a director with a penchant for ambitious ideas? As a director, how do you earn the trust to get any of your ideas off the ground and push the creative boundaries without pushing your boss's buttons? In this He Said/She Said presentation, hear each professional's perspective on how they have managed each other and the relationship, ultimately creating a culture that fosters creativity, risk-taking, and the occasional awesomeness.

Presented by Michael Grant, Director, Marketing & Communications and Christine Nielsen, Chief Executive Officer, Canadian Society for Medical Laboratory Sciences

Creative Problem Solving

This session will provide participants with an understanding of the Six Thinking Hats® methodology developed by Dr. Edward de Bono as well as an opportunity to reflect on the impact your thinking approach has on the way you work with others. Six Thinking Hats® is an important and powerful creative problem solving technique. It is used to look at decisions from a number of important perspectives. This forces people to move outside their habitual thinking style and helps them get a more rounded view of a situation. Participants will have an opportunity to reflect on their experience and draw lessons that they can apply back on-the-job.

Presented by Ilana Stern, HR Manager, Central Services & Training, MaxPeople

Bring Your Association Into the 21st Century of Finance

Thanks to technological innovation, financial practices in associations are changing. Are you looking for efficiencies, a better work flow, and cost savings for your association? This presentation will focus on the technologies and best practices that will modernize your association. We'll make recommendations on everything a Not-for-Profit Finance Director or CEO should know about new ways to bank, do your bookkeeping and even have an audit. If you have questions, we have answers! This presentation is the brainchild of a team of CPAs who specialize in the NFP niche and deliver award-winning service.

Presented by Laura Gay, Assurance Partner & Not-for-Profit Practice Leader Stern Cohen LLP

Mentorship for Today's Associations: How One Association Successfully Grew its Membership by Engaging its Young Professionals

Mentorship has been around ... well, forever. The benefits for individuals and organizations are widely known. Yet, few associations, especially smaller ones, have been able to successfully establish a mentorship program. Some experts say now, more than ever, associations are challenged to demonstrate relevance to their members, and the competition is fierce for the finite amount of money individuals have to spend on professional affiliations. This case study, spanning nine years, examines one association's unique and successful model of mentorship, and what seemingly makes it so "right" for today's evolving association landscape. The best news is that any association large or small can implement this model.

The Greater Toronto Chapter of NAIOP (Commercial Real Estate Development Association), launched its unique mentorship Program several years ago in order to attract and engage young professionals, 35 years of age and under. Since the annual program was launched, the association has nearly doubled its membership, directly attributable to the mentorship program. This has helped infuse the organization with new energy, enthusiastic volunteers, and simultaneously engaged senior members of the association in a new and satisfying way.

Presented by Constance Wrigley-Thomas, CAE and John Thomas, Essentient Association Management

The Disruptive Forces of AI in Market and Behavioural Research

For the past century, organizations have relied on focus groups and telephone surveys to research, study, and understand consumer behaviour. However, we have transitioned to a digital age and such methods have become unreliable and obsolete. Through 1950 to 1980 40% of homeowners responded to telephone surveys, but in 2017 reports estimate that respondent participation has dropped to 7% and primarily includes very specific respondent demographics (upper middle-class Caucasian individuals). With the rise of social media, organizations have a plethora of information at their fingertips, however, with millions of tweets, shares and posts being shared everyday it is difficult to find and analyze the messages/opinions of target customers. As we know AI is revolutionizing many industries and the market and behavioural research industry is set for mass expansion due to new technologies. Erin will delve into how organizations can take advantage of social media and AI to not only understand what their customer wants today, but to predict what they need tomorrow. After attending this session, participants will be able to:

- Identify how companies can analyze social media to understand current customer concerns and desires;
- Understand how Artificial Intelligence can be implemented in their organization, on a small and large scale; and
- Utilize Artificial intelligence and social media to predict consumer trends.

Presented by Erin Kelly, CEO, Advanced Symbolics

Embrace Your Inner Resiliency Ninja

At times, it can feel like you're playing a real-life game of whack-a-mole, swatting down one problem just in time for another to erupt, at home and work! Conflicting priorities, rapid change, and unending demands on your time and talents can cause burn out, frustration and a loss of productivity. Resilience is a skill that can be nurtured and perfected by anyone eager to embrace all life has to offer. With the right formula, and Allison's new and exciting twist on the topic of resilience, you can hone your inner strength, metabolize unhealthy stress faster and rise stronger, and even more successful than before, no matter what challenges you face.

Presented by Allison Graham, Resiliency Ninja | Keynote Speaker

Membership Engagement: A Millennials' Perspective

How do you get your information into the hands of your membership? And how do you do it without annoying anyone? How do you engage each generation? Over the last 24 months, the Medical Laboratory Professionals' Association of Ontario has revolutionized communication channels with our members. This case study reviews the various strategies and planning used to deliver key messages across the generations that make up our membership. Each target group is approached differently, and our progress has resulted into an increase in new members and year-over-year member retention.

Presented by Chelsea Verbeek, Marketing & Membership Coordinator and Alicia Shipway, Exam & Membership Coordinator, Medical Laboratory Professionals' Association of Ontario

Machine Learning Beyond the Hype and Why Your Association Should Care?

Digital transformation initiatives often overlook the critical role that machine learning and automation play in digitalization efforts. In this session, Yousif will outline the business case for machine learning in associations. Machine learning is a key emerging trend dominating the digital conversation. However, if executives don't understand how to approach the question of machine learning and automation, they risk the failure of future-proofing their association and becoming irrelevant in the digital age. This session offers a practical approach for executives to look beyond the hype and begin to incorporate the imperative of machine learning and data into their digital transformation thinking.

Presented by Yousif Hassan, President, Innovexa Solutions

The Role of Good Governance in Achieving Organizational Excellence

When asked “What value does your Board add to you in leading the organization?”, too many of our client CEO’s regretfully tell us “not much actually”. So, what’s wrong? We all accept that Boards are required for regulatory compliance and fiduciary stewardship, but shouldn’t there be more? Shouldn’t volunteer directors actually make the organization, make the CEO, better? If they’re not, isn’t everyone’s time being wasted? Come explore the reasons why Boards are disconnected from excellence and the role CEO’s and Chairs MUST play in engaging directors to shape a culture that translates into real value for dues paying members.

Presented by Brad Quinn, Founder & CEO, Gary Simonsen, Vice President, tng (1087338 Ontario Limited dba ‘tng’) and William Harrington, General Counsel, Canadian Real Estate Association

Your Annual Member Survey – Are You Looking Down the Road or in the Rear-View Mirror?

The typical member survey is essentially a report card. It gives us solid feedback on such things as our educational and communication offerings. But the questions tend to be association-centric not member-centric. They typically do little to enhance our understanding of our members’ challenges and problems. They don’t give us much information on how, we the association, can help our members be more successful and achieve their goals. In this session, attendees will be given the tools and techniques they need to design more member-centric surveys. Through actual case histories, they will learn how to acquire the information they need to deliver superior value to their members.

Presented by Gerald Bramm, President, Bramm Research Inc.

The Power of Engagement

Strategic planning doesn’t just happen in a boardroom. During this session, Danielle will address the importance of engaging members and stakeholders throughout the planning process, not only renewing relationships, but building trust and ultimately buy-in along the way. Danielle will share a case study of an association representing an industry in a time of high-growth and leadership transition, and how deep engagement helped re-engage its membership and support for a new, bold direction. Danielle will facilitate a meaningful discussion with participants about the barriers for change, tips on how best to authentically engage members, and how this influences planning.

Presented by Danielle Rocheleau, Vice President, Laridae

Legal Check-Up: Top 10 Tips to Effective Legal Risk Management for NPOs & Charities

Non-Profit Organizations (NPOs) and charities are facing increasing legal and complicated challenges in delivering their services to members and the public. As such, it is important to understand developing trends in legal risk management considerations in order to reduce unnecessary exposure to legal liability. This session will enable NPOs and charities to identify some of the most common areas of legal risks and how to effectively address and manage those risks through practical tips. After attending this session, participants will be familiar with the following tips to achieve effective legal risk management:

- Get to know your organizational documentation
- Know who is in charge
- Monitor third party use of property
- Check insurance and risk transfer documentation
- Watch out for wasting assets
- Ensure compliance with privacy and anti-spam law
- Monitor employee and volunteer liability risks
- Be prepared for a CRA audit
- Ensure compliance with donor restrictions
- Know the legal basis for investing surplus funds

Presented by Terrance Carter, Managing Partner, Carters Professional Corporation

Staying Strategically AGILE

The success of AGILE software development has led to its governing principles being applied in other environments, especially those where adapting to uncontrollable, rapid external change and tight budgets abound. Sound familiar? In a series of roundtables across the country, Grant Thornton sat down with CEOs of leading not-for-profits to investigate their application of AGILE to their strategy and operations, and to learn their opinions of the concepts. In this session, hear the best of those ideas and experiences so that you can improve your association's AGILITY.

Presented by Danzel Pinto, Principal, Grant Thornton LLP

Do You Know Who is Managing Your Money?

Investors trust financial advisors with their accumulated wealth, but how much do they really know about the people they trust? This session explores the structure of the industry, the roles, skillsets and investment structures available to different types of advisors and firms. This session is designed to fill in knowledge gaps that can leave an investor vulnerable and provide the information necessary to avoid common pitfalls. This presentation will address common misnomers that can lead investors towards poor decisions.

Presented by Julie Brough, Executive Vice-President and Portfolio Manager, Logan Wealth Management



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