



Holiday Inn

BURLINGTON HOTEL & CONFERENCE CENTRE

**9th Annual CSAE Trillium Winter Summit
Conference Schedule and Education Sessions**

February 13-15, 2019

**Holiday Inn Burlington Hotel and Conference Centre
Burlington, Ontario**



www.csaе.com/networks/trillium

Tel: (647) 346-2723

admin@csae-trillium.com

@CSAETrillium

Wednesday, February 13, 2019

TIME	ACTIVITY
3:30 pm - 7:00 pm	Registration
4:00 pm - 5:30 pm	“That’s Your Problem” Workshop by Jennifer Spear, President & Creative Strategist, Clean Slate Strategies
7:00 pm - 9:00 pm	Social Activity

Thursday, February 14, 2019

8:00 am - 5:00 pm	Registration
8:00 am - 9:00 am	Breakfast
9:00 am - 10:30 am	Opening Remarks and Keynote Winning Body Language for Leaders by Mark Bowden, Expert in Body Language, Human Behaviour, and Communication sponsored by 
10:30 am - 11:00 am	Connection Break sponsored by 
11:00 am - 12:30 pm	Concurrent Workshop 1A: So Much Law: So Little Time by Victoria Prince, Partner, Borden Ladner Gervais LLP Concurrent Workshop 1B: Selling Techniques by Pat Mussieux, CEO & Founder, Steps2Happiness, Inc. Concurrent Workshop 1C: How to Produce a Compelling, Inexpensive Podcast Your Members Will Actually Listen To by Warren Weeks, Founder, Weeks Media Concurrent Workshop 1D: The Impact Marketing Strategy on Modest Budgets: 3 Real World NFP Case Studies that are Driving Long-Term Success by Christine Saunders, President, Halmyre
12:30 pm - 1:45 pm	Lunch
1:00 pm - 1:45 pm	Luncheon Keynote Cannabis in the Workplace by Laura K. Williams, President, Williams HR Law
2:00 pm - 3:00 pm	Concurrent Workshop 2A: Content Marketing: A Shiny New Tool in Your Member Engagement Toolbox by Cathy Bowers, Communications Manager, Canadian Society for Medical Laboratory Science Concurrent Workshop 2B: Membership Growth Strategies by Dory Jade, CEO, CAPIC Concurrent Workshop 2C: When Disaster Strikes: Planning & Executing a National Conference in 34 days by Natalie Marino, CMP, Marketing & Events Specialist, Canadian Society for Medical Laboratory Science; and Ryan Young, Associate Director of Sales, Brookstreet Hotel Concurrent Workshop 2D: The UnScripted Associations: Think Faster. Lead Smarter. Act Now! by Jennifer Spear, President & Creative Strategist, Clean Slate Strategies
3:00 pm - 3:30 pm	Connection Break sponsored by   
3:30 pm - 5:00 pm	Concurrent Workshop 3A: Enterprise Risk Management for CEOs by Patrick Gauch, Vice-President, Corporate Services and CFO, Supply Chain Management Association Concurrent Workshop 3B: 2018 HR Law Year in Review and Trends to Watch for in 2019 by Laura K. Williams, President, Williams HR Law Concurrent Workshop 3C: Reboot Your Robot: ROI is in the Ability to Speak. Period. by Lauren Ferraro, Executive Public Speaking & Presentation Coach Concurrent Workshop 3D: In the Weed: Legalization of Recreational Cannabis – Implications for the Events and Meeting Industry by Malak Sidky, President, Health Care Event Planning, Natalie Lowe, CMM, Celebrate Niagara, Andrew Spencer, Risk & Insurance Advisor, PROLINK Insurance Inc.
6:30 pm - 9:30 pm	Winter Summit Signature Networking Reception and Dinner Stand-Up Dinner, Beverages and Entertainment sponsored by  BURLINGTON HOTEL & CONFERENCE CENTRE

Friday, February 15, 2019	
8:00 am - 8:30 am	Breakfast
8:30 am - 9:30 am	Knowledge Bites - Lightning Talks
9:30 am - 9:45 am	Mini Connection Break
9:45 am - 10:45 am	<p>Concurrent Workshop 4A: Leveraging Member Engagement: The Power of Local Hydro by Teresa Sarkesian, President & CEO, Electricity Distributors Association</p> <p>Concurrent Workshop 4B: Flash Forward Your Certification Needs by Lydia Sani, Managing Partner, Redwood Performance Group; and Sandra Parker, Manager, Professional Development, Insurance Brokers Association of Canada</p> <p>Concurrent Workshop 4C: Steps to Successful Consulting Engagements by Jacqui d'Eon, Principal, JAd'E Communications Ltd.</p> <p>Concurrent Workshop 4D: Emotional Persuasion: The Most Important EQ Skills Needed in Business Today by Paul Byrne, Senior Partner and Trainer, Mackay Byrne Group</p>
10:45 am - 11:15 am	Connection Break
11:15 am - 12:30 pm	<p>Concurrent Workshop 5A: Maintaining NPO Tax Exempt Status: What You Need to Know and Why It Matters by Terry Carter, Managing Partner, and Theresa Man, Partner, Carters Professional Corporation</p> <p>Concurrent Workshop 5B: Kickstart Your Community by Kristy Sadler, Senior Marketing Executive, EventMobi</p> <p>Concurrent Workshop 5C: What's Your WOW – How to Tell Your Unique Brand Story by Liz Scott, Business Coach Consultant, Affinity Coach Consulting</p>
12:30 pm - 1:30 pm	Lunch
1:30 pm - 2:45 pm	<p>Keynote Speaker and Closing Remarks You're Sabotaging Your Business Because You're Sabotaging Yourself! by Pat Mussieux, CEO & Founder, Steps2Happiness, Inc.</p>

Platinum Sponsors



Gold Sponsors



Venue Sponsor



Silver Sponsors



Event Sponsors



Bronze Sponsors





TRILLIUM

9th Annual 2019 Winter Summit

Final Education Program

WEDNESDAY AFTERNOON WORKSHOP – That’s Your Problem

What if you could gather the best minds to help you solve your toughest challenges...? As a leader, you are always faced with tough challenges and often with limited options of who you can turn to for advice or simply to talk it through, especially if your challenges relate to your staff, your members, your boss or your Board.

In this hands-on general session (or session open to everyone), you will:

- Connect & Collaborate with your peers
- Learn Problem Solving Tools that can be used immediately at your workplace
- Solve a unique problem facing you and your organization

This session is not theoretical. It is focused, relevant and personal for each participant.

Each person solves a real problem and they get to help others solve their problems.

This session will allow You to **Give & Get**

- What do you **GIVE**? – you will give your insights & ideas while you collaborate with your peers to help them solve their toughest challenges
- What do you **GET**? – you get the time & attention of smart, talented leaders focused on helping you solve your toughest challenges

Collaborate with your peers, solve a problem and learn practical and powerful tools to help you solve any problem at work

You walk in with a problem and leave with a solution and tools to apply at work along with powerful connections

Jennifer Spear, President & Creative Strategist, Clean Slate Strategies

KEYNOTE SESSIONS



Winning Body Language for Leaders

With such fierce competition for time and attention today how will YOU ever stand out as a leader, win trust and gain credibility? In this provocative and entertaining keynote, adapted from his extremely popular TEDx Toronto talk, Mark will help you understand how certain common nonverbal behaviours may be steering you away from building and strengthening relationships that could ultimately help you realize your greater potential. Mark then gives you the tools to confidently convey a powerful executive leadership presence through world class communication skills that capitalize on instinctual processes of the brain; winning others over to you and your message. He teaches how to use your body language to win trust, build your credibility, listen like a leader, and inspire action to ultimately communicate in a style that is transparent, courageous, compelling, persuasive, influential and conversational.

Mark Bowden, Expert in Body Language, Human Behavior, and Communication, Speakers’ Spotlight

Cannabis in the Workplace

As most employers know, the federal government's Cannabis Act legalized recreational marijuana use in Canada when it came into force on October 17, 2018. As the legalization of recreational marijuana approached, and now that it has occurred, many employers have expressed and continue to express concerns regarding the impact this legal development may have on their workplaces. To contain workplace impacts related to the legalization of recreational marijuana, employers, HR, and management must consider key concepts, legal requirements, common pitfalls organizations encounter and key strategies and best practices relevant to this challenging topic. We will explore:

- the legal framework that relates to both medical and recreational marijuana in the workplace;
- employer obligations, including when the duty to accommodate may apply, and requirements for a compliant accommodation procedure;
- common pitfalls organizations encounter when navigating issues related to medical and recreational marijuana in the workplace; and
- practical strategies and best practices to effectively set conduct expectations and proactively mitigate risks related to medical marijuana use and recreational marijuana legalization.

Laura Williams, President, Williams HR Law

You're Sabotaging Your Business Because You're Sabotaging Yourself!

In this day and age of high expectations in the business, stress is at an all-time high! People are overwhelmed, overworked, overweight and unhappy. People feel a lack of control when it comes to the work that must get done. What we know for sure is that it is critical for us to take care of ourselves before we can handle anything or anyone else. Pat will share the five fundamentals to transforming your health – and provide five strategies you can then use to transform your life and transfer all of that into the workplace.

Pat Mussieux, CEO & Founder, Steps2Happiness, Inc.

Lightning Talks

This year, the CSAE Trillium Winter Summit is building on the new program feature launched at the CSAE Conference called Lightning Talks. These quick presentations are intended to stimulate new ideas, present innovative solutions to common challenges, and inspire conversation. 20 slides, 20 seconds each, 7 minute presentations. Kick back and enjoy learning in this fast-paced session.

CONCURRENT SESSIONS

UnScripted Associations: Think Faster. Lead Smarter. Act Now!

The pace of change today is unparalleled and accelerating, the plans that worked in the past are no longer working, your members are facing new challenges and therefore need new things from you, and you still need to perform.

You will be introduced to The UnScripted Mindset that will allow you to face uncertainty and ambiguity and create opportunity. It will allow you & your organization to not only adapt to change, but to take advantage of change and innovate without fear. Based on the principles of improv and problem solving, you will laugh while you learn the critical skills to manage the UnExpected, the UnPredictable and the UnAvoidable.

Learning Objectives:

- Harness the power of working & leading using the UnScripted Mindset in order to remain relevant to your members
- Leverage the critical skills of successful improvisers to think on your feet, collaborate, communicate, negotiate, engage & develop trust and support
- Laugh while you Learn Tools & Techniques that can be applied immediately in your work

Jennifer Spear, President & Creative Strategist, Clean Slate Strategies

What's Your WOW – How to Tell Your Unique Brand Story

Some associations are thriving, but others who may want to grow their memberships to the next level are simply doing the wrong things to get the best possible results for their marketing dollars. With so much noise in the market place it is more important than ever to create effective and impactful branding and value propositions. Figuring out how to do this is the tricky part and that's where this workshop will really help you get focused, creative and make your association stand out in a very crowded market. Every brand needs a story – what's yours?

Liz Scott, Business Coach Consultant, Affinity Coach Consulting

2018 HR Law Year in Review and Trends to Watch for in 2019

A new year usually brings feelings of renewal and opportunity. It's a great time to reflect on the past year to set, evaluate and refine goals for the coming year. 2018 was a year of significant legislative activity that has resulted in a myriad of new compliance obligations that employers cannot ignore. This session will review the key developments in labour and employment law for 2018, will identify employment law trends to watch for 2019, and will explore effective strategies and best practices for employers to meet new compliance obligations and reduce workplace risks. Participants will:

- explore certain key developments in labour and employment law in 2018 that are significant to employers, including, ESA scheduling rights amendments, pay transparency and more;
- discuss significant trends that employers should be aware of in 2019 to mitigate risks and liability when handling people management issues; and
- identify practical strategies to deal with developments and trends within the workplace.

Presented by Laura Williams, President, Williams HR Law

Selling Techniques

Much to the chagrin of many who are 'employees', we are all in sales! No sales, no organization. The word 'sales' has earned a bad reputation and the vision of 'sleazy' often comes to mind. It doesn't have to be that way. In this session, Pat will guide you to a new way of thinking that causes you to get excited and enthusiastic when it comes to sales – as well as my 5-W Formula for keeping it easy and effective! She grew her business from zero to just under \$1M in less than 6 years – she knows how to do this!

Presented by Pat Mussieux, CEO & Founder, Steps2Happiness, Inc.

How to Produce a Compelling, Inexpensive Podcast Your Members Will Actually Listen To

Podcasts are exploding in popularity and with good reason. In our time-starved culture, podcasts are an extremely efficient way for people to download knowledge directly into their brains. They're easy to listen to and easy to share which makes them an ideal marketing tool for associations. But launching and maintaining a great-sounding, interesting podcast takes some know-how. In this session, Warren will walk you through the process of launching your own podcast – from idea to iTunes – including overviews on equipment, recording tips, storytelling, interviewing skills, audio editing, promoting your podcast and more.

Presented by Warren Weeks, Founder, Weeks Media

Leveraging Member Engagement: The Power of Local Hydro

The Electricity Distributors Association is the voice of Ontario's local hydro utilities – the companies that distribute power to homes and businesses province-wide. Ahead of the 2018 provincial election, these utilities worried that escalating electricity costs could become a contentious political issue, even though distribution rates were not the cause. The EDA heard members' concerns and initiated a grassroots public and government relations campaign to promote and protect the hydro distribution sector. This session will demonstrate how the right messages, media, member involvement and timing kept members out of the political spotlight, even when hydro costs became a hot election issue.

Presented by Teresa Sarkesian, President & CEO, Electricity Distributors Association

Flash Forward Your Certification Needs

Compliance and internal business rules for certification are two main points that cost associations dearly in administration and money. Moving certification programs to online formats generates HUGE efficiencies and cost savings. By looking at the certification lifecycle and starting with the end goal first—exam automation is a logical step. Redwood Performance Group has created a custom online certification process for IBAC's complex needs. This session brings participants through a case study of what was done for IBAC and how it is improving their exam process, making their members happy, and saving them money, time and resources.

Presented by Lydia Sani, Managing Partner, Redwood Performance Group; and Sandra Parker, Manager, Professional Development, Insurance Brokers Association of Canada (IBAC)

7 Steps to Successful Consulting Engagements

Every association needs to hire consultants from time to time. But, not every consulting engagement ends well, and some come with a lot of headaches along the way. What is the difference between spectacularly successful projects and those that achieved so-so or even disastrous results? Whether you are the client or the consultant; the project is a multi-year, big budget one; or a short-term, low budget item, there are seven steps to making any consulting engagement a success – including saving your sanity!

Presented by Jacqui d'Eon, Principal, JAd'E Communications Ltd.

Maintaining NPO Tax Exempt Status: What You Need to Know and Why It Matters

Most associations (other than registered charities) claim tax exempt status as non-profit organizations under paragraph 149(1)(l) of the Income Tax Act. However, many of these associations may not always be aware of what is involved in claiming NPO status. This session will provide an explanation of the key aspects of their NPO status, including:

- What are the advantages and disadvantages of NPO status?
- Why maintaining NPO status for your association is important?
- How the landscape of regulating NPO status is changing?
- What are the basic requirements of NPO status?
- What are the CRA filing requirements for NPOs?
- What are some practical steps in maintaining NPO status?

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

Kickstart Your Community

There's nothing like the buzz of an event to make attendees feel excited, engaged, and ready to take on the world. But how do you start that buzz—and once it's started, how do you keep it growing? During this workshop, you'll learn strategies and tactics for building a thriving event community before, during, and after your events, and how to leverage the community to meet your association's top goals. Tactics used for the Winter Summit will be highlighted in a case study.

Presented by Kristy Sadler, Senior Marketing Executive, EventMobi

Emotional Persuasion: The most important EQ skills needed in business today

Incorporate the gold standard of emotional intelligence into your life: Empathy. Like a rare commodity this skill predominates in high-performers but is available to all. Learn how to incorporate empathy into your thinking and witness the personal and professional growth that ensues. Intrapersonal awareness is the foundation of everything! Take charge of your attitude and you take charge of your life with new strategies for beating negativity, eliminating doubts, and setting positive goals. Understand the power of thought, and its impact on prompting emotion. Recognize that thoughts are a choice, and that the right choice leads to better decisions and better outcomes. Being persuasive is clearly one of the more important of the professional attributes. And yet, most professionals miss opportunities to capitalize on the emotional triggers that others use when making decisions. We'll explore the subtle, yet powerful, persuasive strategies that increase the likelihood of others saying, 'Yes' to our compliance requests. Creating and maintaining a positive emotional connection requires high emotional intelligence. Understanding the personalities of others and having the skills to adapt our own behaviors to create comfort is the key to interpersonal awareness. Destroy the barriers that keep us apart and learn to emotionally connect with those with whom we interact.

Presented by Paul Byrne, Senior Partner and Trainer, Mackay Byrne Group

When Disaster Strikes: Planning & Executing a National Conference in 34 days

What do you do when your worst case scenario actually happens – your contracted venue closes its doors a month before your conference? Follow the event planning journey from the viewpoint of both a not-for-profit association planner and a hotel conference centre who came together to move a national conference with only 34 days' notice. This case study explores various aspects of risk management, logistics and communication from the venue and planner side. For planning this includes finding a new venue, arranging logistics for a 50-booth tradeshow and communicating changes to sponsors, exhibitors, speakers and delegates. On the venue side, we'll explore details on what had to take place to accommodate a large group with multiple space requirements, including the date shuffle of other confirmed groups, working with unique spaces to create dinner appropriate settings, and coordinating last minute logistics through effective communication. Join us while we review how to prepare for the unexpected, ensure good communication and work within tight timeframes.

Presented by Natalie Marino, CMP, Marketing & Events Specialist, Canadian Society for Medical Laboratory Science; and Ryan Young, Associate Director of Sales, Brookstreet Hotel

Content Marketing: A shiny new tool in your member engagement toolbox

If content is king, who is ruling your castle? Content marketing has the power to influence membership engagement, growth and value. How do you go about using this tool without sacrificing time and resources? With real-life examples, this session will give you a better understanding of what content marketing is, how to use it strategically and how to start weaving it into your existing membership engagement plan. Be prepared to do a little brainstorming too! You'll be guided through an exercise to help unearth content marketing gold mines that already exist in your association, starting you on your content journey. This session is a hot topic because content marketing is a powerful tool and the association world is the perfect environment for it. Yet, it might not be used often or properly when we chase trends or fear the expense. No matter the size of an association, content marketing can be implemented successfully. This session will help clarify the concepts of this marketing tool while provided real world examples of its use for associations.

Presented by Cathy Bowers, Communications Manager, Canadian Society for Medical Laboratory Science

Membership Growth Strategies

A membership-based organization, the Canadian Association of Professional Immigration Consultants (CAPIC) is the national association and voice of immigration consultants, founded on the principles of education, information, lobbying, and recognition. Over 2000 members strong, CAPIC leads, connects, protects, and develops the profession, serving the best interests of its members. In 2013 CAPIC had around 500 members across Canada, most of whom were Regulated Canadian Immigration Consultants (RCICs). Then, in 2014, its board of directors did something different. First, it began an extensive study that would eventually lead to the development of a strategic plan to direct the organization to set objectives. Second, it worked extensively to overhaul CAPIC's corporate governance model, moving the organization toward compliance with the Canada Not-for-profit Corporations Act and modernizing the relationship between board and management. These two changes in strategy had a profound effect. Today, the organization enjoys strong ties with government officials, thanks in large part to its strategic plan. Moreover, the robust relationship between board and management has led to policy changes which have in turn resulted in membership exceeding the 2000 mark and a rise in income from \$600,000 to over \$1 million in 2017. Indeed, the most effective member engagement tool is often policy changes (in this case in immigration and citizenship), as in our experience they have adequately responded to the most pressing issues faced by our members, allowing RCICs to practise much more efficiently. Thus, member engagement tools must be tailored according to the specific demands of the member and the governance model of the member association.

Presented by Dory Jade, CEO, CAPIC

Enterprise Risk Management for CEOs

Risk oversight is a high priority for most association boards and senior staff, but for many it is also more or less uncharted territory. In this session we will discuss a framework for enterprise risk management specifically designed for associations and how it might be applied and implemented. The framework will include identification of the Board's responsibility for risk oversight and management's responsibility for enterprise risk management.

Presented by Patrick Gauch, Vice-President, Corporate Services and CFO, Supply Chain Management Association

So Much Law: So Little Time

This session would focus on answering some of the questions posed around governance and related matters, such as: are terms limits good? Is it better to have an odd number of directors? Do directors still have to be members? Should they be? How can I communicate with directors and members – can we email notices of meetings? Who can use a proxy? Can we limit the use of proxies? Is there anything new around directors' and officers' obligations? Is there an optimum number of director meetings? Do directors get sued for bad board behaviour? How can we minimize risk for our organization? Optimally, it would be great to get some questions from possible participants in advance of the session so we could respond to those at the session.

Presented by Victoria Prince, Partner, Borden Ladner Gervais LLP

The Impact Marketing Strategy on Modest Budgets: 3 Real World NFP Case Studies that are Driving Long-Term Success

This interactive session covers three case studies of not-for-profit organizations and associations that have invested in their marketing strategy and how it is paying off for them. Key discussion topics are on the value of truly listening to your "customers," getting out of your comfort zone with disciplined innovation, and how to tell a story that connects with your mission and vision.

Presented by Christine Saunders, President, Halmyre

Reboot Your Robot: ROI is in the Ability to Speak. Period.

I'm BORED! Can we change the culture of boring presentations? Are WE boring? Is it the COMPANY content? Is it our Vocal DELIVERY? How did we get here? How can we move from, (ensuring I hear my hair grow)... to obliterating tired, cliched, templated-talks that currently form most of our interactions with others.

Escape the mundane and learn the tools to truly ignite any group conversation.

Presented by Lauren Ferraro, Executive Public Speaking & Presentation Coach

In the Weed: Legalization of Recreational Cannabis – Implications for the Events and Meeting Industry

This session will explore the effects of the legalization of recreational cannabis on the meetings and events industry. We will draw from international experience such as The Netherlands, USA (Colorado), South America and Europe (Portugal) as to the impact of legislation and whether it has led to more or fewer problems for crime, traffic fatalities, drug abuse and privacy issues. The goals of the session are to familiarize the delegates with the federal law, the various provincial ramifications, our obligation as event hosts and employers, and how to mitigate risk whether you are an independent planner, a venue, a Board of Tourism or an insurance company. Subject mastery will be attained via the use of case study analysis and round table discussion.

Presented by Malak Sidky, President, Health Care Event Planning, Natalie Lowe, CMM, Celebrate Niagara, Andrew Spencer, Risk & Insurance Advisor, PROLINK Insurance Inc.



CSAE Trillium Summits

www.case.com/networks/trillium

Tel: (637) 346-2723

admin@csae-trillium.com

@CSAE Trillium