CAE Summit: The Executive Challenge
An interactive learning experience designed for real-world impact
October 6-7. 2025
Avion Center, Chandler AZ
12-hours CAE Continuing Education Credits*
* Pending ASAE approval

The **CAE Summit: The Executive Challenge** is a two-day program designed for association executives who are pursuing their Certified Association Executive (CAE) credential or seeking to strengthen their leadership acumen through continuing CAE education. This high-energy experience goes beyond traditional learning, featuring **top-tier speakers, real-world case studies, and problem-solving challenges** that will hone your decision-making skills. Attendees will engage in **group discussions and team learning** on topics that reflect the complex challenges faced by today's association leaders. Ideal for professionals who want to **fast-track their CAE certification, refine executive leadership skills, and expand their professional network**, this summit delivers **practical, actionable takeaways** you can immediately apply to elevate your organization's success. Plus, with a **hosted networking dinner and exclusive access to industry thought leaders**, this is a **must-attend** event for anyone looking to **lead with confidence and impact** in the association world.

Schedule:

Monday, October 6th

- 8:00a   Registration opens
- 9:00a   Opening Remarks

                          Speaker Introductions

                          Attendee Introductions

- 9:45a   Cecilia Sepp & Susan Bitter Smith – *The Value of CAE Certification*
- 10:00a   Session 1
- 11:00a   Session 2
- 12:00p   Networking and Lunch
- 12:30p   Session 3
- 1:30p   Session 4
- 2:30p   Break
- 3:00p   Session 5
- 4:00p   Session 6
- 5:00p   Recap/Looking Ahead
- 5:15p   On-site networking reception
- 6:30p   Hosted Dinner (Sponsored)

Tuesday, October 7th

- 8:45a   Welcome by Cecilia Sepp
- 9:00a   Session 7
- 10:00a   Session 8
- 11:00a   Session 9
- 12:00p   Working Lunch/Session 10
- 1:00p   Session 11
- 2:00p   Session 12
- 3:00p   Wrap up/Closing Remarks
- 3:15p   Adjourn

Session Descriptions:

1. Session Title
The Fuel for the Future – Knowledge Management!

Presenter
Cecilia Sepp, CAE, ACNP
Principal and Founder
Rogue Tulips Nonprofit Consulting & Association Management Services

Session Description
Associations stockpile a lot of information from databases to Sharepoint folders. But do we use it effectively? And what are we leaving on the table?

Knowledge is not just what we memorialize. It is all the knowledge, experience, and relationships that staff and leadership build over time. If there is not mechanism to capture it, all that valuable knowledge disappears when they walk out the door. Associations can and should make the time to collect this intangible asset to support their present work and inform their future work. This session will review knowledge management principles, discuss why this valuable asset needs to be curated, and provide ideas for how to build your association's knowledge management system.

Attendees will walk away with:

- An understanding of the value of knowledge management
- Why it is an important asset that fuels future growth
- How it helps with transitions and succession planning
- How to create their own knowledge management system

CAE Domains Covered

- **Domain 3B: Organizational Strategy-Knowledge Management**

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2. Session Title
Board-Staff Dynamics: Navigating Volunteer Politics, Building Trust & Refreshing Legacy Structures

Presenters
Meg Hyatt, CAE
Executive Director
National Elder Law Foundation

Susan Bitter Smith, CAE
Executive Director
Southwest Cable Communications Association

Session Description

Strong governance relies on more than bylaws—it's built on trust, clarity, and evolving leadership. In this interactive session, nonprofit professionals will explore how to navigate internal board politics, strengthen trust between staff and volunteers, and respectfully modernize legacy board structures. Through real-world examples and practical tools, participants will leave with strategies to manage past chair influence, set healthy boundaries, and recruit the next generation of leadership. Whether you're an executive, board member, or emerging leader, this session will help you build stronger partnerships for long-term success.

CAE Domains Covered:

- **Domain 1: Governance**

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3. Session Title
The Volunteer Experience – It's About Options

Presenter
Cecilia Sepp, CAE, ACNP
Principal and Founder
Rogue Tulips Nonprofit Consulting & Association Management Services

Session Description
Despite technology telling us it would give us more time – it lied! Technology actually takes up more and more of our time so how can we ask our members to give us that precious commodity? What's in it for them? Creating a valuable volunteer experience that encourages members to get on the association leadership track helps build a leadership pipeline, broaden knowledge about the association, and builds loyalty to the association.

While successful volunteer leadership programs require a strong functional system, it's all about the outcome of having a great experience. This session will review options for creating systems that support success and ideas for engagement.

Attendees will walk away with actionable steps to:

- Assess their current volunteer leadership program (or create one!)
- Identify future leaders

- Design orientation and onboarding that works for your membership

CAE Domains Covered

- **Domain 1C, 1 - 3: Governance-Volunteer Leadership Development**

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4. Session Title
Non-Dues Revenue and Content Monetization

Presenter
Tracy Petrillo, EdD, CAE
Chief Learning Officer
California Association of School Business Officials (CASBO)

Session Description
Associations operate from traditional models of learning and professional development. Few have explored the potential to maximize and re-use their content and subject matter expertise in new ways. We will explore successful models of content repurposing to drive member value and non-dues revenue.

CAE Domains Covered:

- **Domain 3A: Organizational Strategy, General Management**
- **Domain 3C: Organizational Strategy, Knowledge Management**
- **Domain 5A: Business Development, Products, Services, and Non-dues Revenue**

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5. Session Title
New Business Models

Presenter
Tracy Petrillo, EdD, CAE
Chief Learning Officer
California Association of School Business Officials (CASBO)

Session Description
Discuss the potential of micro-certificates and stackable credentials within your association. Consider the learner journey, gap analysis, and career progression that could form new programs and revenue generation. Assess the possibility of partnerships with higher education, workforce development and industry partners.

CAE Domains Covered:

- **Domain 3A: Organizational Strategy, General Management**
- **Domain 3C: Organizational Strategy, Knowledge Management**
- **Domain 5A: Business Development, Products, Services, and Non-dues Revenue**

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6. Session Title
Breaking Through the Noise: Communication Strategies That Work

Presenter
Patrick Farrey, CAE
CEO
Society of Plastics Engineers

Session Description
In today's crowded communication landscape, associations must work harder than ever to ensure their messages reach and resonate with the right audiences. This interactive session explores how association leaders can improve both internal and external communication by breaking through the clutter, selecting the right mix of channels, and crafting messaging that matters—especially in a mobile, on-the-go world.

Participants will examine real-world strategies for aligning communications with organizational goals, managing multiple platforms, and delivering content tailored to the preferences of diverse audiences. Whether you're communicating to members, staff, or stakeholders, this session will help you sharpen your focus, increase engagement, and measure effectiveness.

CAE Domain(s) Covered

- **Domain 8 – Marketing & Communications**

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7. Session Title
From Grassroots to Government: Mobilizing Members and Partners to Pass Lifesaving Legislation

Presenter
Lisa Zarda, CAE, CNAP
Executive Director
United States Swim School Association

Session Description
How does a passionate cause turn into state law? In this powerful session, dive into the real-

world journey of successfully passing groundbreaking legislation in New York that now requires hospitals to show new parents with a water safety education video. This story-driven workshop will explore how association leaders leveraged the passion of local members—not only as volunteer advocates, but as financial contributors—to fund a dedicated lobbyist and create lasting legislative impact.

Participants will learn how the campaign evolved from a local initiative to a growing national movement, as additional states begin to adopt similar measures. You'll gain insights into building coalitions with like-minded organizations, managing advocacy momentum across state lines, and scaling member mobilization to achieve legislative wins that align with your mission.

Attendees will walk away with actionable strategies to:

- Engage members as grassroots leaders and financial backers
- Navigate legislative processes through local partnerships
- Build alliances with mission-aligned organizations
- Translate a successful pilot into a replicable, multi-state advocacy model

CAE Domains Covered

- **Domain 1: Strategic Management** – Developing and adapting a mission-driven advocacy strategy
- **Domain 3: Governance and Structure** – Harnessing the power of volunteer leaders and local member networks
- **Domain 4: Membership Development** – Engaging members as champions and contributors to legislative initiatives
- **Domain 7: Public Policy, Government Relations, and Advocacy** – Executing a legislative campaign and managing multi-state advocacy efforts

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8. Session Title
Advocacy in Action on behalf of our Profession

Presenter
Susan Bitter Smith, CAE
Executive Director
Southwest Cable Communications Association

Session Description
How can Association Leaders engage on behalf of our profession at the State and Local level? How do we identify potential partners on these issues? What are the hot issues of the moment? Why should we care?

CAE Domains Covered

- **Domain 7: Public Policy, Government Relations, and Advocacy**
  - **A4.   Foster relationships with legislative offices and advocates**
  - **B1.   Identify and organize coalitions to address emerging issues of common interest**
  - **C3. Evaluate emerging issues, including social justice, using the organization's criteria for policy engagement**

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9. Session Title
A Future without Fear – Adaptive Leadership as Mindset and Skillset

Presenter
Cecilia Sepp, CAE, ACNP
Principal and Founder
Rogue Tulips Nonprofit Consulting & Association Management Services

Session Description
The 21st Century presented many unanticipated challenges in its first 25 years. From pandemic lockdowns to wars to activist Administrations, leading associations in this era can be daunting. However, the future does not need to be one of fear and uncertainty with the right mindset and skills to move your organization through the unexpected in real time.

Adaptive Leadership is a skill set based on critical and analytical thinking, relationship management, environment scanning, and thoughtful (but quick) decision making processes. This session will define Adaptive Leadership, share examples of how to apply it, and provide steps that you can use to create your own approach to leading into The Undiscovered Country known as the future.

Attendees will walk away with actionable steps to:

- Assess environmental factors
- Build consensus in decision making
- Create a culture of action – not reaction
- Implement your system for adapting to change in real time

CAE Domains Covered

- **Domain 2D, 1 - 8: Executive Leadership – Adaptive Leadership**

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10. Session Title
What's New & What is Changing in the World of Meeting Planning

Presenter
Karolyn Kiburz, CMP
President
Meetings & Concierges Source LLC

Session Description
This round-table interactive discussion will explore the latest trends, tools, and best practices transforming meeting management.

Topics covered include:
• 	Dealing with the rising cost of food/beverage and A/V
• 	Are you leaving money on the table? Ideas for sponsorships
• 	Are government changes impacting meetings and attendees
• 	Reviewing hotel contracts
• 	Mitigating risk

CAE Domain(s) Covered

• **Domain 5B – Business Development, Meetings & Events**

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11. Session Title
The Ethical Nonprofit

Presenter
Cecilia Sepp, CAE, ACNP
Principal and Founder
Rogue Tulips Nonprofit Consulting & Association Management Services

Session Description
Ethics are increasing in importance as the world around us becomes increasingly complicated. An understanding of ethics and how to apply them is crucial to any organization's success. But ethics start with the individual; how individuals apply ethics – or don't – determines organizational ethics and behavior.

This content will provide useful definitions, offer scenarios for consideration, and encourage discussion about the nature of human behavior and what type of people we want to be.

This session satisfies the CAE Ethics CE requirements.

Attendees will walk away with:

- A better understanding of ethics
- Ideas for applying ethics in both personal and professional situations
- Suggestions for how to create or update codes of conduct/ethics

CAE Domains Covered

- **Domain 2B: Executive Leadership-Ethical Leadership**
- **Domain 6D: Member and Stakeholder Engagement-Ethical Standards**

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12. Session Title
The Solutions Speed Round

Presenter
Open Discussion

Session Description
Sometimes you just need to "phone a friend!" In this open, safe, collaborative environment, attendees can pose problem/questions/challenges to the group. With moderated discussion, we'll quickly offer some initial ideas or approaches and create "support cohorts" to partner up and do a follow-up deeper-dive into the issue. Participants will tap into the wealth of knowledge from their peer community, once again demonstrating the value of the network.

CAE Domains Covered

- **Multiple**