

# CYA! [Cover Your Association!]

## MSAE ASSOCIATION EXCELLENCE SEMINAR



### Monday, May 6, 2024

11:00 am Registration

11:30 am-12:45 pm Lunch

Welcome by Oxford Mayor **Robyn Tannehill**

Program: "Lightening the Load: Leveraging Laughter to Keep Association Executives Sane" -**Danielle Maack, Ph.D.**

1:00 pm-5:00 pm Information Desk Open

1:00 pm-2:45 pm

Educational Session: Policies Can Protect You! -**Steven Stout, CAE**, Executive Director, Texas Society of Association Executives. Overview and sample policies including, but not limited to:

- Nondisclosures/confidentiality
- Code of Ethics
- Board Policy/Operations Handbook
- Board Assessment Tools
- Recommended Financial Policies
- Code of Conduct
- Conflict of Interest statement - completed by every leader.
- Code of Ethics
- Board Policy/Operations Handbook
- Board Assessment Tools
- Recommended Financial Policies
- Code of Conduct
- Communications/ Social Media

2:45 pm-3:15 pm Cinco De Mayo Networking Break!

3:15 pm-4:15 p.m.

Contingency/Crisis Management Plan: Don't be Caught without a Plan if You or Your Staff are hit by the Proverbial Bus! - **Steven Stout, CAE**, Texas Society of Association Executives

- Weather-or Fire-Related Event City/Region Event- plans to follow in case of an emergency.
- Contingency Plan in the event of the CEO has an abrupt medical or family emergency to take them away from their responsibilities for an unforeseen length of time.
- Access to records and systems -following contacts and access points for business continuation purposes

4:15 pm-5:30 pm

Study Hall: Develop and/or update your policies using templates and examples provided. (Optional)

6:00 pm-Until

Hop on the hotel shuttles for drinks and dinner at Bouré, located on the Oxford Square. Enjoy creole southern fare while taking in the view from their large balcony. Afterwards, explore the other nightlife on the Square. Shuttles run 24/7!

### Tuesday, May 7, 2024

8:30 am Breakfast Buffet

9:15 am- 10:00 am

Educational Session: Covering Your Association Through Insurance -**Aaron Greenwood**, Marketing Representative, Federated Insurance

You may think you are properly covered by traditional Directors & Officers and General Liability insurance polies. But are you? With risks changing with increased online platforms, credit card usages, online payments, and responsible liquor service, it may be time for a fresh look at what your organization may need.

10:15 am - 11:30 am

Educational Session: Cover Your Association Employment Practices **Nick Morisani**, Partner Phelps Dunbar

- A good Employee Manual is vital in covering your management staff when addressing challenges with staff. Morisani will walk attendees through ways to reduce or avoid discrimination, harassment and promote a productive & respectful work environment.
- How often and the method an organization uses to assess employees' efficiency, productivity and possible advancement or discipline requires Effective Performance Evaluation Processes.

11:30 am

Wrap-up and final announcements

