

EMPOWERING ASSOCIATION EXCELLENCE: THE SOURCE FOR PROFESSIONAL INSIGHT

# INSIGHT

*Magazine*

QUARTER 4 | 2024

THE OFFICIAL PUBLICATION OF THE MISSOURI SOCIETY OF ASSOCIATION EXECUTIVES



## Who Are Your Future Members?

Removing Barriers for Students to Engage in Associations and to Promote Your Association as a Career Choice

pg. 10

Tax Reform 2025: What Association Leaders Need to Know

pg. 6



# INSIGHT

QUARTER 4 | 2024

*Magazine*

THE OFFICIAL PUBLICATION OF THE  
MISSOURI SOCIETY OF ASSOCIATION EXECUTIVES



Missouri Society of Association Executives  
PO Box 1574  
Jefferson City, MO 65102-1574  
573-659-8898  
info@msae.net  
www.msae.net

#### EDITORS/EXECUTIVE DIRECTORS

Sarah Luebbert, APR  
Kathy Pabst, MBA, CAE

#### GRAPHIC DESIGN

Heather Rice  
Missouri Park & Recreation Association

Stock photos downloaded from Freepik.com

#### INTERESTED IN ADVERTISING IN THE NEXT EDITION OF INSIGHT MAGAZINE?

For more information, please contact  
info@msae.net or go to  
www.msae.net/msae-media-kit.



## MSAE CAREER CENTER

*Member benefit*

The MSAE career center is a complimentary service for members to post job vacancies at their association or organization, and for those looking for new career opportunities.

LISTINGS WILL BE AVAILABLE  
FOR 30 DAYS



NO COST TO MEMBERS TO POST  
OR TO LOOK FOR OPPORTUNITIES



LEARN MORE

[www.MSAE.net](http://www.MSAE.net)

# CONTENTS

2024 MSAE Board of Directors..... 3

Message from the President..... 5

Tax Reform 2025 ..... 6

A Hotelier’s View Point..... 8

Who are Your Future Members?..... 10

SMEs (Subject Matter Experts) Needed ..... 12

Conference Considerations..... 13

Member News and Updates ..... 14

# AD INDEX

Coffee & Conversations..... 15

Hotel Vandivort..... 15

Insight Magazine..... 12

Margaritaville Lake Resort ..... 9

MemberClicks ..... 13

MSAE Career Center ..... 2

Lake of the Ozarks ..... 15

The Resort at Lake Ozark..... 7

Springfield CVB..... 4

# Board of Directors

## 2024 MSAE BOARD OF DIRECTORS



**PRESIDENT**  
MATT AMICK



**PRESIDENT-ELECT**  
GARY GATES



**SECRETARY/TREASURER**  
BILL PLANK, CAE



**IMMEDIATE PAST PRESIDENT**  
MICHAELA HAYMAKER



**VICE PRESIDENT OF MEMBERSHIP**  
LISA PATTEN



**VICE PRESIDENT OF EDUCATION**  
MICHELLE WALTERS



**VICE PRESIDENT OF COMMUNICATIONS**  
APRIL UNDERWOOD



**BOARD MEMBER**  
DAN KLEINSORGE



**ASSOCIATE BOARD MEMBER**  
TIM JACOBSEN



**ASSOCIATE BOARD MEMBER**  
LISA PEREZ, CMP



# HAPPY HOLIDAYS FROM *Springfield, Missouri*

Warm wishes from the city of the Ozarks! A big thank you to all the groups who made us their destination in 2024. We loved being part of your year and can't wait to welcome you back to Springfield, MO in 2025.



**Lisa Perez, Sales Manager**  
*Visit Springfield, Missouri*  
lisa@springfieldmo.org | 417-881-5300 ext. 113  
**SPRINGFIELDMO.ORG/MEETINGS**

VISIT  
**SPRINGFIELD**  
MISSOURI



## FROM THE PRESIDENT

# From The President



**PRESIDENT**  
MATT AMICK

As we near the end of the calendar year, my time as MSAE President will come to a close and we will welcome new leadership for 2025.

Reflecting back to the beginning of 2024, MSAE had recently transitioned to new staff leadership with the hiring of co-Executive Directors Kathy Pabst and Sarah Luebbert. MSAE was at a point where we needed to get back to the basics and focus on stable operation of the organization. Our goal was to bring better communication, engagement, and organization to MSAE. We hope you have seen better representation from MSAE in 2024. Kathy and Sarah have provided a steady hand to MSAE and the Board couldn't have asked for better people to lead us into the future.

We had a great 2024 with several accomplishments:

- Membership grew 42 percent.
- Our industry partner members came through yet again and provided wonderful support to MSAE through the form of sponsorships and contributions. MSAE wouldn't be what it is without our industry partner members!
- We executed a very successful Event Summit. This was the second year of the revived event with more attendees and sponsors than the previous year.
- We revamped this magazine. I don't know about you, but I love the look and feel of MSAE Insight!
- We held over a dozen events, including Coffee and Conversations, education meetings, Event Summit and culminating with our Holiday FunFest this month.
- Finally, the aforementioned stability of leadership puts us in a position of growth.

Speaking of growth, I am excited for the year ahead. The Board has new ideas to enhance membership engagement and the value of your membership. We are excited to bring in new members, provide opportunities for young Association leaders and renew our interactions with CEOs and Executive Directors on how MSAE can be a tool for your respective organizations. As always, please share your thoughts and ideas on how we can strengthen MSAE.

I wish everyone a very happy holiday season and a wonderful year ahead.

Thank you for the opportunity to lead MSAE in 2024.

*Matt Amick*



# TAX REFORM 2025

## What Association Leaders Need to Know

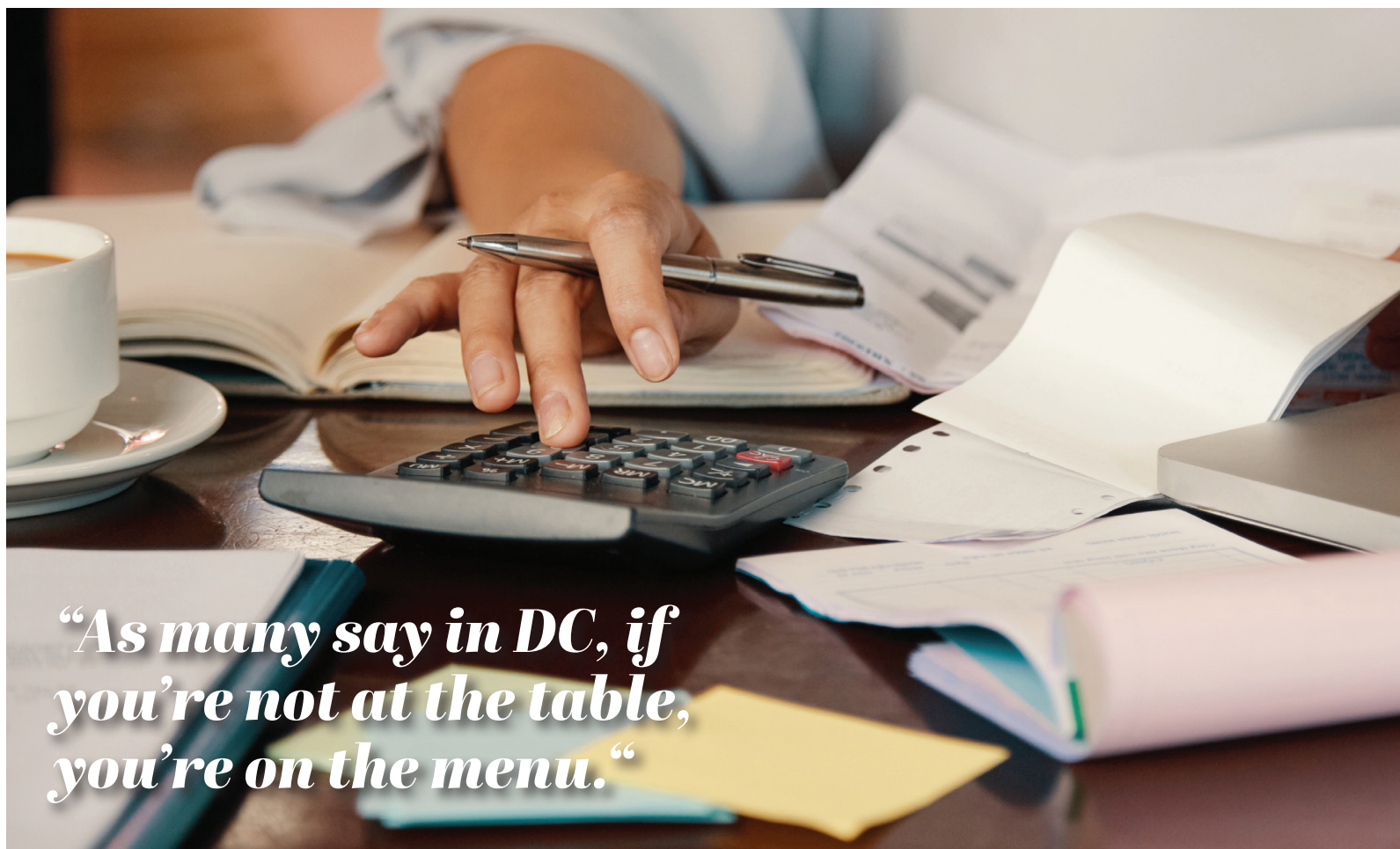
Sara Barba, *Principal* | Integer, LLC

If you've been filtering through the political noise to listen to federal policy conversations, you may have begun to hear about "2025 tax reform" and perhaps about its potential impact on nonprofits, specifically associations. In short, tax provisions set to expire at the end of next year have set up an interesting tax policy opportunity in DC, during which lawmakers and advocates will seek to influence extensions and changes to the tax code to advance their interests. Associations have an opportunity to protect their organizations and missions, but only if they have the right context, learn from lessons in 2017, and coalesce to form a united front against bad policy ideas that could needlessly hurt nonprofits.

### Looming Since 2017

When Republicans in Congress passed the Tax Cuts and Jobs Act in 2017, they had to use a budgetary mechanism to get around the typical 60-vote threshold required for passage of a bill in the Senate. That mechanism limited how much tax revenue the government could "lose" over the course of the following 10 years through tax cuts, and it forced Congress to make a decision – which cuts need to be permanent and which can expire in order to protect the federal budget? Ultimately, they ended up choosing to keep the corporate rate cut permanent to ensure certainty for businesses and set an expiration for individual tax cuts, hoping future Congresses would feel compelled to extend the cuts, regardless of the party in power.

During the tax reform negotiations in 2017, one of the many tax policy changes resulted in businesses losing the ability to deduct parking and transportation benefits provided to their employees. In an effort to "level the playing field" between nonprofit and for-profit employers, Congress enacted an unrelated business income tax (UBIT) on the same benefits at nonprofits at a 21 percent rate. The misguided provision created so much concern among nonprofits, that a coalition formed (led by associations) to reverse the policy. Less than a year after passage, the lead sponsor of the tax bill, who crafted the tax, successfully repealed the provision as a result of major pushback from across the country.



*“As many say in DC, if you’re not at the table, you’re on the menu.”*



This example of associations and other nonprofits being unfairly taxed in a major tax reform bill should serve as a lesson and a warning: the less Congress knows about how your organizations operate and the critical nature of your tax-exemption, the more likely they are to see you as a potential source of revenue.

### Looking Ahead to 2025 Tax Reform

Now, millions of Americans are facing down a potential tax hike at the end of 2025 if the individual provisions aren't renewed or made permanent. That outcome wouldn't be politically popular for either party. Therefore, something must be done, regardless of the outcome of the election this year. But deficits and debt are at all-time highs, and there is desire, on both sides of the aisle, to "pay for" tax cuts, at least partially, not to balloon the federal debt further. This is different than the tenor in 2017, which put more of a focus on economic growth than reining in government spending. Congressional

leaders in both parties have acknowledged that tax changes need to be paid for, and that means all industries are on the table.

And the environment is arguably less friendly for nonprofits than it was in 2017. Instead of small provisions like the parking and transportation UBIT, we're hearing outside influencers urge Congress to go after the tax-exempt status broadly to pay for tax cuts. At the same time, key committees and their members have been particularly skeptical of the return taxpayers are getting for tax-exemption of certain organizations, displaying in many cases a lack of understanding of why nonprofits receive different tax treatment than for-profits. So, while it would be unlikely to see lawmakers completely scrap the tax treatment of the nonprofit sector, the environment is not one that should be taken lightly.

The good news is there are opportunities to engage and tell the story of associations to those who will be making these tax law

changes. In 2018, following the unfavorable changes in the TCJA, the nonprofit sector collaborated to explain why nonprofits are different from for-profits and why an active tax on them would harm civil society. Now is the time to do that again. There will be a lot of interest groups making the case for why their industries shouldn't face tax increases next year, and nonprofits can't rely on reputation alone to protect their tax treatment. As many say in DC, if you're not at the table, you're on the menu. ♦

For more information about efforts in DC to prepare associations for tax reform, and to find out how to weigh in, contact **Sara Barba** at sbarba@integerpolicy.com.



**THE RESORT**  
**AT LAKE OF THE OZARKS**

Over twenty thousand square feet of meeting space, 155 guest rooms, Encore Lakeside Grill & Sky Bar on-site & more!  
[theresortlakeozark.com](http://theresortlakeozark.com) | 573-693-9988



# A HOTELIER'S VIEW POINT

## Request for Proposal From a Hotelier's Perspective

Lorie Jaegers, CGMP, CTA | Courtyard by Marriott, Columbia

What does Request for Proposal (RFP) mean to a planner vs a hotelier? For a planner, they are looking for a location to have a conference or event. A supplier (the hotel or event center) wants to accommodate this conference, all while meeting budgets. Let's discuss RFPs from my perspective as a hotelier. I always want to give a fair and accurate proposal; however, I need all the information I can get to accomplish this task!

All RFPs must include the name of the organization, contact person, address, email and phone number. This way, if the hotelier completing the RFP has questions, they know who to email or call.

Be sure to include the event name, purpose of the event, your dates, and if the dates are flexible.

Sleeping room nights can have a big impact on the proposal that is submitted. Be sure to include your room block needs. For example, how many rooms you need each night, if you will submit a rooming list for master bill, or if your guests will be responsible for calling and making their own reservations and payment. Also, do you have a guest room budget or expectations?



Will you have VIPs, or will you need room upgrades? We can build these items into a proposal to make our property stand out from those who may not offer these upgrades.

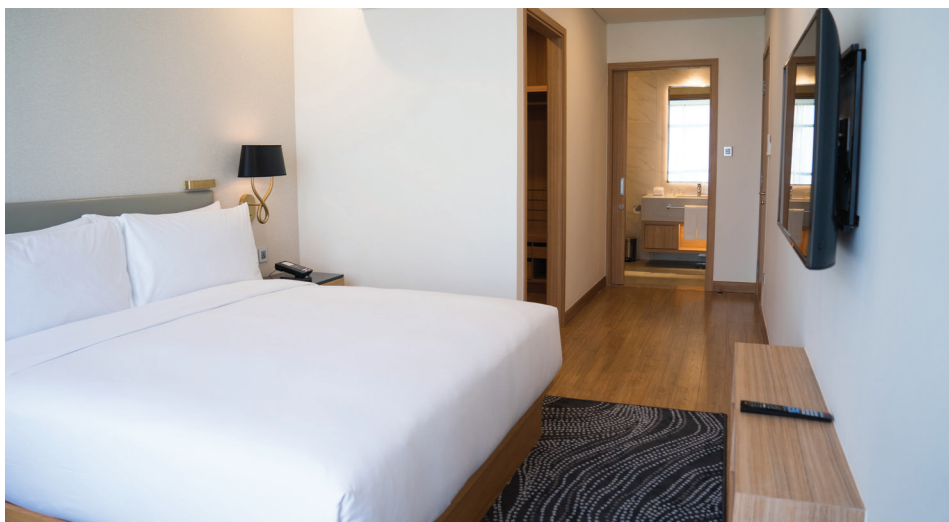
For the meeting space, include the number of estimated guests, number of meeting rooms, and how you want the rooms set up. Do you need anything in the room, such as exhibit tables, break tables, audio visual equipment, and what the time frame is for each of these items or rooms. If you're having breakouts, what day and what times

of the day, and how many rooms can be used repeatedly? Be sure to include whether the main room will also be used for a breakout session or if that could be a time for the hotel to clean up or resell the space. Include your meal set-up request, such as can meals be served in the general session room, do they need their own room, or will they be served in the exhibit area?

Food can be an entire section of an RFP if it's a large event. However, even if it's a small event, be sure to include the number of meals and what days, times, and how many attendees at each.

Do you have a food and beverage budget? This helps the hotelier determine whether their product will work for you, whether they need to get creative, or whether they cannot bid on the RFP.

Tell the hotelier your audio-visual needs up front; yes, you can always add to the list as the meeting gets planned, but knowing what you need or expect in the beginning helps a hotelier create a more realistic proposal. Depending on the AV needs, the hotel or the meeting planner may need to look for an outside AV company, so don't forget to include this step!



*Sleeping room nights can have a big impact on the proposal that is submitted. Be sure to include your room block needs.*



Special requests or concessions should always be included in the RFP. Do not expect the hotel to agree to all your concessions; if you have a long list, be sure to list them in order of importance. All hoteliers have budgets, and most can only do so much complimentary, but they may have the option to provide you some items for a discounted rate, if they can't provide them at no charge

We all like to know what we are up against, and hoteliers are no different. Are you looking at multiple cities or focusing on one location only? If multiple cities are being considered, please list them because the cost of sleeping rooms and food varies greatly based on location.

You've likely heard the saying, "Timing is everything." That applies to RFPs, too, so be sure to let the hotelier know when you need one and what the timeline is to make the final decision. Will there be multiple initial rounds of reviews, then site visits, then a final decision? All of that is important information, and the more you share, the more we can plan.



*Do you need anything in the room, such as exhibit tables, break tables, audio visual equipment, and what the time frame is for each of these items or rooms.*

Information, information, information! The more information you can place in your RFP, the more accurate your proposal will be. This also lessens the chance of additional charges being added later because the hotelier was unaware of an important

need for your meeting. If you can provide the information in this article and use the sample RFP provided at <https://bit.ly/4fXvTUI>, you should have a smooth RFP process and accurate proposals provided to you. ♦



## FIND YOUR License to Chill

Elevate your association's meetings and event experience at Margaritaville Lake Resort.

Contact our on-site sales team to learn more about our convention center, recreational activities, and the many unique offerings we can create for you and your group.



494 TAN TAR A DRIVE | OSAGE BEACH 65065 | (573) 348-3131  
MARGARITAVILLERESORTLAKEOFTHEOZARKS.COM



# MEMBERSHIP RECRUITMENT

## Who are Your Future Members?

Kathy Pabst, MBA, CAE, Executive Director | Missouri Academy of Family Physicians

As association professionals, we are challenged to always look to the future like we have a crystal ball, waving our hands around it and looking for a sign of what is to come. Although we don't have that crystal ball, we do have the ability to analyze characteristics, demographics, and behaviors of our current members to help develop strategies to promote our industry or profession to students, whether in high school, college, or life-long learners. We want to ensure our association's future is continued on a strong foundation for future growth.

As the executive director of an association representing family physicians, we are always looking for opportunities to grow awareness of our organization and profession in high school students, college students, medical students, and residents. We are challenged to help reduce the physician workforce shortage in Missouri and the United States. This can be accomplished through private partnerships, advocacy, government programs, and collaborating with "suppliers" of students (i.e., educational institutions). We start by assessing students' matriculation as they traverse their educational journey and at what point do they make that final decision about "what do I want to be when I grow up?"

Some know as far back as childhood and are influenced by their parents, older siblings, or other people that play a strong role in their lives. Yet others are indecisive up to the point of a hard deadline to make that final selection. Sometimes necessity makes that decision. Yet, not all professions require degrees and allow for flexibility in recruiting employees. But, what can we do to help educate students to make their career decisions sooner and to plan their future based on that decision? In order to ensure our association is sustained, we must develop some variance of an emerging professionals' program within our

profession or industry. Most associations have a student membership classification. The Missouri Academy of Family Physicians is no exception. We allow medical students to join at no cost. A summary of our student benefits includes the free student membership, complimentary conference registration fees, complimentary lodging (limited availability), essay contest with cash prizes, medical student scholarship, externship opportunities (similar to internships), hosting a conference just for students, scholarly activities to build their curriculum vitae, leadership development programs, and board of directors' position (with voting privileges.) Each program listed above has a direct purpose of removing barriers for students to join/engage in the association, and to promote family medicine as a career choice.

Student members engage more transactionally and leave more frequently, and how do you capture them during that short period of time. Conducting research of past, present and future younger members on their behavior and expectations can provide insight into how your organization can change to meet their needs. This reimagination will be your crystal ball to see how you can revitalize this segment of your membership. Remember, our younger/student members are our future active members. The investment today will pay dividends in the future for long-

term relationships and commitment to the organization.

An article on the ASAE website, "Design Membership to Take Students from College to Career" (Ebner, 2019, <https://associationsnow.com/2019/04/design-membership-take-students-college-career/>), offers suggestions for student membership and retention.

1. Create a first-timer and student-in-transition membership tiers
2. Offer personalized content that is relevant for young members
3. Provide early-career networking

Based on the programs and benefits of the Missouri Academy of Family Physicians, we can confidently check each suggestion above to recruit and retain medical students in our statewide organization with a needed value of the students. However, the outcomes are not that easy. We collaborate





with medical schools and residency programs for their support of our organization to their students/residents. The retention of residents to new physician (active) membership has dropped over the years and new incentives are being developed to encourage their conversion to active membership. Our national office invests heavily into member research and satisfaction. This drop in active membership is the result of the cost of membership due to the high cost of education/loans, perceived value of membership, not completing required continuing medical education for membership, and conversion to retired status.

Communication channels for reaching students and young professional change almost on a daily basis. Whether you are using one of the many social media apps, text, print, email, or paid advertising, you will need to know your potential member's preferences and habits for communication. A challenge that some associations have with the retention or conversion of student members is that once they graduate, their ability to connect via email will end if it is a \*.edu email address. A potential resolution to this issue is that students could be required to also use a non \*.edu email address. This would provide an opportunity for continuity of communication with this membership population for a conversation from student to professional member of your organization.

According to the Marketing General Incorporated 2024 Membership Marketing Benchmarking Report, 7% of student memberships do not convert to full membership which is an average of 1% for individual membership organizations and 14% for trade associations.



## For Your Information ...

Here are some ideas that you can consider to add value and attract the rising members of your profession or industry to engage and become involved:

- **Serve on the board of directors**
- **Serve on committees**
- **Events just for students**
- **Attend high school career fairs**
- **Attend college or career fairs**
- **Form a student member interest group**
- **Offer education or training with hands-on experiences with your younger members**
- **Provide scholarship(s) with specific criteria**
- **Host a contest about your profession or trade**
- **Develop a leadership program for high school or college students**
- **Provide paid internship opportunities**
- **Sponsor a student to attend a local, state, or national conference in your field**
- **Host facility tours for students and counselors**
- **Visit with school faculty and counselors**
- **Participate in FFA, VICA, DECA, HOSA or other statewide events**
- **Offer free membership**
- **Reduced or free registration fees to association events**
- **Create a state “week” for your profession (through legislation), or promote an existing week to students to bring awareness**
- **Create an ambassador program within your field**
- **Allow students to author articles for your publications**
- **Create a campus to career mentoring program**
- **And, as always, include food as an incentive**

As an association, understanding the needs of your young and new professionals will guide your programs and services to attract this membership segment. This can be accomplished through qualitative research of your current members, past members, and those who have never joined. Each segment will likely have different responses to their interest in joining an association. This same process could be used for retention as their needs will likely change from a student to young or new professional.

As you can see, there are many strategies that can be considered to help read the crystal ball of your future young professionals' membership. Most associations are nimble enough to conduct targeted research, analyze the results to identify new recruitment and retention initiatives, and reassess the outcomes for refining, expanding, or canceling the program. Be the association that your young professionals need to succeed in their careers. ♦



## ARE YOU A SME? (SUBJECT MATTER EXPERT)

# ARE YOU AN EXPERT OR ALMOST AN EXPERT ON A SUBJECT? IF SO, LET'S GET YOU TEACHING OTHERS!

MSAE works with SeminarWeb to provide an educational library for our members. If you didn't know about this resource, check out the Association Resources page on our website (MSAE.net). As part of our partnership, SeminarWeb reached out to us to ask for possible topics and speakers to provide education in 2025. If you are a subject matter expert (SME) on a topic, this is a great opportunity to share your expertise with others!

You may be asking yourself, what qualifies a person as a SME? That answer is pretty simple. Do you know more about an association topic than the average person in a room of other association staff? If so, you are a SME! You don't have to be a full-blown, write a book on the topic expert, but if you love a specific topic or geek out on something and like to share that information with others, this is a great opportunity for you. Complete our form at <https://bit.ly/4ehJR2g>, and we will be in touch to assist in your submission to SeminarWeb.



### STILL NOT SURE IF YOU ARE A SME?

Maybe the list of topics below will help you decide if you now more than the "Average Bear" on a topic!

- Hotel contract negotiations, risk management, succession planning
- Member engagement/retention/recruiting and board management
- How marketing has changed to service the multigenerational workforce
- Navigating Excel
- How to deal with consolidation (including governance)
- Responsible use of AI
- How to present budgets or assess risk
- Managing employees remotely and in person - hybrid.
- Ethics
- Implementing project management tools
- Volunteer management
- Simplifying meeting planning
- Risk management
- Board Orientation
- CAE Know before you Test
- Conducting employee performance evaluations

**INSIGHT**  
*Magazine*

MEMBER UPDATES TO SHARE?  
EXCITING NEWS TO ANNOUNCE?  
THINKING OF CONTRIBUTING AN ARTICLE?  
LOOKING FOR ADVERTISING OPTIONS?

[info@msae.net](mailto:info@msae.net)

The banner features a background of various photos related to business and travel. The text is overlaid in white and bold. The email icon is a white envelope inside a circle.



# CONFERENCE CONSIDERATIONS

## THINKING OF HOSTING YOUR NEXT BIG CONVENTION IN THE MIDWEST? MEET IN MISSOURI!

If you know of an organization planning a national or regional conference, consider Missouri!

Through the Missouri Division of Tourism and the Missouri Department of Economic Development, the "Meet In Missouri Act" offers incentives to bring large out-of-state conventions to the state.

### WHAT TYPES OF EVENTS ARE ELIGIBLE

To qualify, conventions must meet these criteria:

- More than half of the attendees travel from outside Missouri, requiring overnight stays.
- The event must be a competitive bid against non-Missouri cities.

- Without this grant, Missouri would not have been a likely host for the event.
- The event is scheduled within five years from the application date.

A Missouri Destination Marketing Organization (DMO) or Convention and Visitors Bureau (CVB) will handle the application process and work closely with event organizers to confirm eligibility. The applicant DMO or CVB must have access to the Destinations International Economic Impact Calculator to complete the application.

For further details, contact a local Missouri DMO or CVB and inquire about the Meet In Missouri Grant Application. Make your next event unforgettable—meet in Missouri! ♦



**Personify<sup>®</sup>**  
**MemberClicks**  
AN ASSOCIATION MANAGEMENT SYSTEM

[HTTPS://MEMBERCLICKS.COM](https://memberclicks.com)



# MEMBER NEWS AND UPDATES

## Leadership Award

**Ann Walters**, Director of Sales and Marketing at Margaritaville Lake Resort, has been awarded the Leadership Award by Driftwood Hospitality Management, a testament to her unwavering commitment to excellence and the success of our team.



## Heading into Retirement

A familiar face to MSAE members will be staying around MSAE, but in a different capacity, well, kind of! **Kathy Pabst**, MBA, CAE, will be officially retiring from her role as Executive Director of the Missouri Academy of Family Physicians at the end of the year. She will, however, be continuing in her role as Co-Executive Director of MSAE.

## Moving Up

**Laura Holloway** was promoted to Deputy Director of the Missouri Municipal League (MML) in September. Laura has worked for MML for nearly 13 years serving as the Communications and Marketing Manager, and most recently as the Communications and External Affairs Director.



# IT'S TIME TO RENEW YOUR MSAE MEMBERSHIP!

### HOW TO RENEW:

**ONLINE:** LOG ON TO [MSAE.NET](https://msae.net) -> CLICK ON MY PROFILE -> CLICK ON RENEW NOW

**PHONE:** CALL US AT 573-659-8898



# 2025 Coffee & Conversations



January 9  
February 13  
March 13  
April 10  
May 8  
June 12

July 10  
August 14  
September 11  
October 9  
November 13  
December 11

Watch for emails each month to find out what the topic and location will be.



## MSAE Coffee and Conversations

January 9, 2025 • 8:00 am  
Three Story Coffee  
311 Bolivar St, Jefferson City, MO 65101

A photograph of a modern hotel conference room. The room has large windows, several round tables with chairs, and a large screen displaying the Hotel Vandivort logo. The ceiling features several large, spherical pendant lights.

**HOTEL VANDIVORT**

**WHERE THE *Big Ideas* HAPPEN**

HIGH TECH MEDIA EQUIPMENT, IN-HOUSE CATERING  
EXPANSIVE EVENT SPACES FOR GROUPS OF ALL SIZES  
**INCLUDING OUR NEW 1500 SQ FT SPACE COMING IN 2025!**

**HOTELVANDIVORT.COM**  
(417) 832-1515





PO Box 1574  
Jefferson City, MO 65102-1574

PRSR STD  
US POSTAGE  
PAID  
COLUMBIA, MO  
PERMIT #286



*Network*



*Educate*



*Volunteer*



*Interact*

*Our Mission*

The mission of MSAE is to promote and support excellence and professionalism among association staff and to work diligently to increase the effectiveness, the image, and the impact of associations as they serve their members and society.



*Learn*