

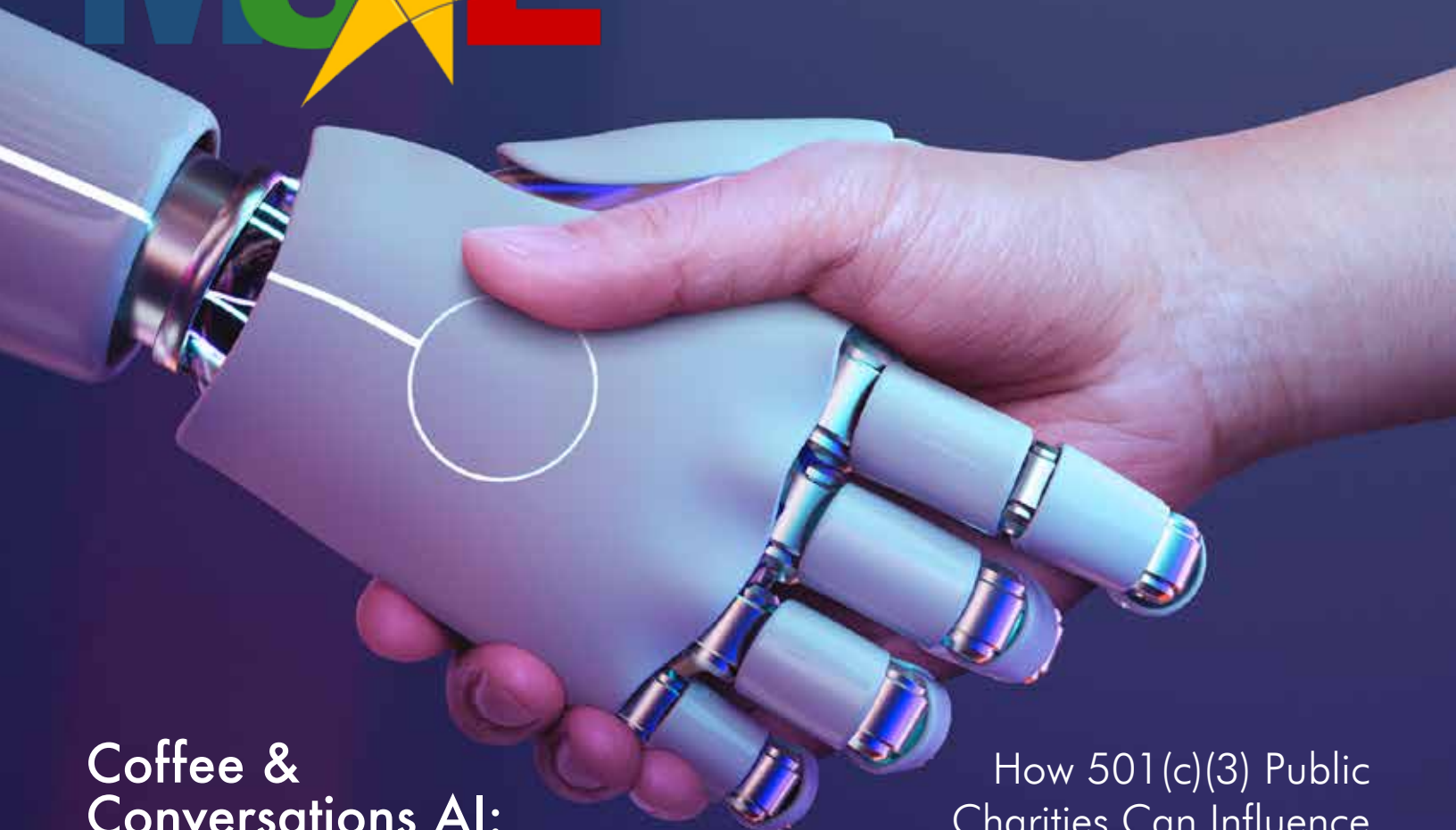
EMPOWERING ASSOCIATION EXCELLENCE: THE SOURCE FOR PROFESSIONAL INSIGHT

INSIGHT

W Magazine

QUARTER 2 | 2024

THE OFFICIAL PUBLICATION OF THE
MISSOURI SOCIETY OF ASSOCIATION
EXECUTIVES



Coffee & Conversations AI:
What You Missed If
You Weren't There
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How 501(c)(3) Public
Charities Can Influence
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Greater Good
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INSIGHT

QUARTER 2 | 2024 *Magazine*



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Board of Directors

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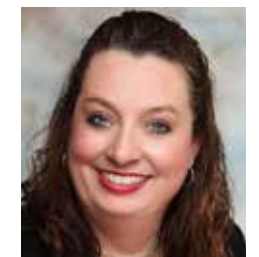
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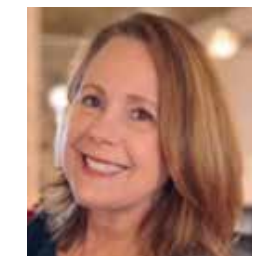
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FROM THE PRESIDENT

From the President



PRESIDENT
MATT AMICK

Believe or not, we are closing in on the halfway point of 2024. While I may have unnecessarily given you extra anxiety, this is a great time to review and reexamine our goals for 2024. Effective goals should be measurable, and I hope you've been charting your progress as you move through the year.

For me, many of my goals have been focused on prioritization and being deliberate and focused on activities both in my personal and professional life. We all have demands coming from every direction. With our platters full, what activities or actions are you prioritizing to make the most impact at work or home?

For our Associations, I imagine we could all agree we want to make sure we are bringing the most value to our members and their businesses or organizations. For our customers, we want to make sure we are bringing valuable and memorable experiences so our customers will continue to support our businesses. For our families, we want to make sure our relationships are meaningful, our family members have quality lives, and we are making sure the future is secure. Being focused, deliberate with our words and actions and prioritizing what is most important will all contribute to bringing more value and more meaning to our personal and professional endeavors.

MSEA entered a new chapter in 2024. With new leadership in the day-to-day activities of the organization, our goal is to bring more value to your membership and grow the organization. We've added 36 new members to MSEA. We've held seven-member networking and education events with great attendance and engagement from our membership. And we are getting excellent feedback from members on how we can continue to improve.

As we move into the summer months, good luck with all your efforts to stay on track with 2024 goals. I hope you all have exciting events and activities planned for your members. And don't forget to check the membership directory and support our Industry Partner members as you plan your summer getaways. Thanks for your support of MSEA!

Matt Amick

SAVE THE DATE

for an afternoon of education, networking,
and connecting with our industry partners from across Missouri



AUGUST 8, 2024 · 01:00 - 04:30 pm
TIGER HOTEL, COLUMBIA, MO

Registration will open mid-June.
Visit www.msae.net to view more information or register.
The website will be updated with information as it becomes available.



HOW 501(C)(3) PUBLIC CHARITIES CAN INFLUENCE POLICY FOR THE GREATER GOOD

Sarah Efthymiou, Senior Counsel, Alliance for Justice | Bolder Advocacy

Whether you are leading, working for, supporting, or volunteering with a nonprofit organization (specifically for purposes of this article, a 501(c)(3) public charity), you may be asking how your organization can leverage its influence and be a true voice for the communities you serve. In other words, how can your organization advocate for its mission? At Alliance for Justice, our Bolder Advocacy attorneys regularly field questions from nonprofit organizations about the meaning of the term “advocacy” and, particularly, how organizations can legally engage in policy advocacy through lobbying.

WHAT IS ADVOCACY?

Effective advocacy enables nonprofits to shape the public debate on important social issues and ensure that underserved communities have a voice in the policies that impact their lives. The term “advocacy” encompasses a broad range of activities that can influence public policy (including research, public education, lobbying, and voter education). Advocacy is one of the best ways nonprofits can advance the issues they care about and help bring about systemic, lasting change.

HOW IS ADVOCACY DIFFERENT FROM LOBBYING?

Lobbying is just one type of advocacy and, while not prohibited, is limited for 501(c)(3) public charities. As such, there are many avenues of advocacy that nonprofits can engage in that do not constitute lobbying, such as attempting to influence regulations or challenging laws via litigation. Federal tax law makes clear that lobbying is specific to attempts to influence legislation at any/all levels of government. On the other hand, “non-lobbying advocacy” is often used to refer to those activities that don’t



meet the definition of lobbying because they don’t involve the making of legislative recommendations.

WHAT KINDS OF ACTIVITIES COMPRISE ADVOCACY WORK?

When it comes to engaging in advocacy, the options for public charities are vast. Your organization could organize a rally, town hall, or similar event to mobilize community members to speak up and advocate for causes important to your mission. You can also engage with legislators by providing them with information on issues of importance to your organization so they can make informed policy decisions. However, to avoid lobbying in these instances, do not discuss specific legislation.

501(c)(3) organizations can also serve as powerful advocates through education. For example, your organization can produce relevant resources that reflect the real story of your community and its needs. Public charities can also engage in nonpartisan voter education by highlighting

the importance of voting and encouraging voter registration. Nonprofits can even educate voters on issues and candidates in a nonpartisan way, and they can provide voters with information about where, when, and how to vote.

PUBLIC CHARITIES CAN LOBBY!

In general, lobbying consists of communications that are intended to influence specific legislation. While the Internal Revenue Code limits the amount of lobbying that can be conducted by 501(c)(3) public charities, lobbying remains an effective and legal form of advocacy for public charities. When calculating their limits, organizations can opt for either the “expenditure test” or the default “insubstantial part test” to measure their lobbying activities. The expenditure test focuses on the financial resources that an organization allocates to its lobbying activities, while the insubstantial part test assesses the overall time and effort plus financial resources it dedicates to lobbying efforts. (See Public Charities Can Lobby:

Guidelines for 501(c)(3) Public Charities.)¹

For organizations that measure their lobbying using the 501(h) expenditure test, direct lobbying is defined as communicating with a legislator to express a view about specific legislation. Federal tax law also considers direct lobbying to include an organization’s attempts to influence the public to vote in a particular way on a ballot initiative. In contrast to direct lobbying, grassroots lobbying requires urging the public, via a call to action, to contact legislators to express a view about specific legislation. Again, while limited, it is legal for 501(c)(3) public charities to engage in both direct and grassroots lobbying. Under the insubstantial part test, lobbying is more broadly defined to include any communication that advocates for or against legislation (including ballot measures).

ADMINISTRATIVE AND EXECUTIVE BRANCH ADVOCACY

Administrative advocacy, which involves influencing the rules that government agencies use to implement laws, can be another impactful way for public charities to further their missions. Under the federal tax rules, engaging in policy advocacy with executive branch and administrative

officials is not considered lobbying. Therefore, as with other non-lobbying activities, such as education and engaging in litigation, administrative advocacy does not count towards an organization’s lobbying limit. (See Factsheet on Administrative Advocacy.)²

It is important to note, however, that many states and local municipalities (in addition to the federal government) have lobbying disclosure requirements that include in the definition of lobbying communications to executive branch and administrative officials. (See State Law Resources: Nonprofit Lobbying)³ As such, please be aware that while this type of activity does not need to count against your organization’s lobbying limits, it may trigger lobbyist registration and reporting.

HOW CAN YOUR ORGANIZATION GET MORE INVOLVED IN ADVOCACY?

Nonprofits have a wide variety of advocacy tools at their disposal to create change in their communities. Providing information and education about current policies and problems affecting your community can be a particularly powerful advocacy tool, whether it is aimed at community members, supporters, or policymakers. Likewise, public charities should not shy

away from policy advocacy in the form of lobbying, especially when influencing specific legislation would further your organization’s mission. It is, however, essential to understand what your organization’s lobbying limits are and to implement an effective tracking system.

Regardless of the types of advocacy tools your organization intends to leverage, it is important to evaluate your organization’s mission and goals and examine whether your existing programs involve advocacy as a means to address problems or grievances in your community. If not, how could advocacy play a larger role in your organization’s programs? (See AFJ’s free online Advocacy Capacity Tool to assess your organization’s advocacy capacity.)⁴ Now more than ever nonprofits have a crucial role to play in effectuating policy change. Bolder Advocacy is here to help with the rules around advocacy and lobbying. Contact us by completing this form, emailing advocacy@afj.org, or calling 866-NP-LOBBY.

The information contained in this article and any links are being provided for informational purposes only and not as part of an attorney-client relationship. The information is not a substitute for expert legal, tax, or other professional advice tailored to your specific circumstances, and may not be relied upon for the purposes of avoiding any penalties that may be imposed under the Internal Revenue Code or state or local law. Alliance for Justice publishes plain-language guides on nonprofit advocacy topics, offers educational workshops on the laws governing the advocacy of nonprofits, and provides technical assistance for nonprofits engaging in advocacy. For additional information, please feel free to contact Alliance for Justice at advocacy@afj.org.



Sarah Efthymiou serves as Senior Counsel for the Bolder Advocacy Program at Alliance for Justice.

In her role, she provides technical assistance, resources, and training to help nonprofit advocates understand their rights and abilities to advocate, lobby, engage in election related activities, and fund advocacy.

¹ <https://afj.org/resource/public-charities-can-lobby-guidelines-for-501c3-public-charities-2/>

² <https://afj.org/resource/administrative-advocacy/>

³ <https://afj.org/bolder-advocacy/state-law-resources-practical-guidance-series/>

⁴ <https://afj.org/resource/advocacy-capacity-tool-act/>

EXCELLENCE THROUGH LEADERSHIP SCHOLARSHIP

LAQUEY R-5 SENIOR AWARDED LEADERSHIP SCHOLARSHIP



The Missouri Society of Association Executives and the Missouri Association of Student Councils are pleased to announce this year's MSAE Excellence through Leadership Scholarship was awarded to **Hannah Thier** from Laquey, Missouri.

Hannah is a 2024 graduate from Laquey High School with a 3.9 cumulative grade point average, finishing fourth in her class of 47 students. She plans to attend Missouri Valley College and major in animal science with a minor in pre-veterinary medicine. Hannah has been an active student and was a member of the National Honor Society; and President, Vice President, and Historian of the Student Council. She is an athlete and has been on the soccer All-Conference team, All-Region player of the year, All-State team; and captain, All-Conference and All-District in Softball.

Local service is important to Hannah and she was involved in road-side clean up in her community, annual bell ringing for the Salvation Army, and volunteer at the Pulaski County Humane Society. Hannah started Mental Health Awareness Week at her high school through her service on the Student Council.

Her academic achievements and commitment to her community are examples of her leadership skills. Her willingness to support students and promote positivity in her environment exemplifies her servant leadership abilities to address and improve her school.

MISSOURI SOCIETY OF ASSOCIATION EXECUTIVES
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Coffee & Conversations

Join the conversation the second Thursday of each month.

| | | |
|------------|----------|--------------|
| January 11 | May 9 | September 12 |
| February 8 | June 13 | October 10 |
| March 14 | July 11 | November 14 |
| April 11 | August 8 | December 12 |

Join us!

Topics and locations will be provided each month via email with more details. Coffee and conversations during the summer will be open conversations.

MSAE ONLINE

ACCESS YOU! Step by Step Access to Your Membership Account

Did you know that you have easy access to your membership account, information, and invoices? If not, the following information will be helpful for you to navigate the MSAE members only content on the website.

1. Log In - Access your own member page at <https://www.msae.net/login>. Your username is either your email address or the initial of your first name and your last name. If you forgot your username and/or password, click on the respective link to reset them. Still can't get access, email MSAE at info@msae.net or call (573) 659-8898.

2. Update Your Profile - You can update your contact information, title, website, etc. by clicking on this link. Adding your photo to your account enhances your profile! Be sure to "save profile."

3. Change Your Password - Once you log in, you can change your password on this page.

4. Membership Status - The expiration date of your organization's membership can be found on this page.

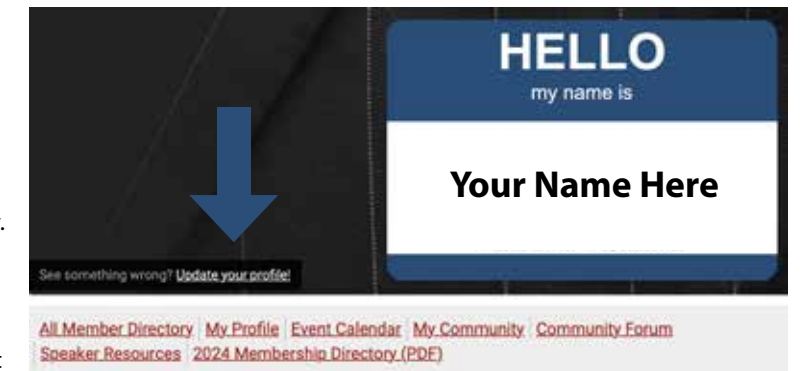
5. Invoices - Access all payments submitted online and download or print invoices/receipts.

6. My Organization - Update your organization's contact information, logo, or product/service in this section. The product/service improves online queries for specific types of members. Don't forget to "save profile."

7. Forms I've Taken - Access all registration forms submitted online.

8. Emails - Do you want to look at a past email sent to you from MSAE? No worries, they are all recorded at this link.

9. Settings - Your contact preferences are on this page.



Look for more functionality on the website through Circles, aka Member Interest Groups (MIG). As we refine the website and database, we will be forming MIGs to further engage and connect with other members. If you have a MIG suggestion, email info@msae.net.

Still need help? We are here to guide you through accessing your account. Call the MSAE office at (573) 659-8898 or email info@msae.net.

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RECAP: COFFEE & CONVERSATIONS

COFFEE & CONVERSATIONS AI

What you missed if you weren't there!

Several members reached out to let us know they couldn't attend the April Coffee & Conversations which was on the topic of artificial intelligence (AI) but were interested in a summary of what was discussed. With this being such a timely topic, we thought we would provide that summary in this edition of the magazine. Here is an overview of what was discussed:

1. WHO'S ACTIVELY USING AI?

Many of the members present said they have dabbled in AI usage but weren't using it on a regular basis. However, a few members stated they are using it regularly and it is saving them time. Some members were curious but apprehensive, which is why they decided to attend the event. Most left saying they were going to look into it more if they weren't already actively using it.

2. WHAT AI TOOL IS MOST BEING USED?

For those using AI regularly, many are using AI throughout several platforms. ChatGPT is the most well-known platform, but there is a fee if you want to use it regularly. Some people mentioned they were using Grammarly's AI feature, others said there is an option in their project management system, and some are using Canva.com. It seems there are as many options as there are uses for it.

3. WHAT IS AI BEING USED FOR?

Despite what you hear on the media, most people are not using AI for images as there is a lot of controversy still surrounding this. Who owns the image if AI is pulling from multiple online sources to generate what you want?



Again, unlike what you may hear in the media, most are not using it to write an article for them. In the association sector, and in the meeting and tourism industry, we need content that is geared toward our markets, and AI will not be able to do that without some time spent training the program being used. Based on discussions, it appears most attendees were using it to proof the content they wrote or asking AI to create expanded text for the bullet points created by the professional for an upcoming event. Another way AI was being used is to create social media posts, as many people have a tendency to use a similar message with most of their posts. Some people also mentioned it's a great way to summarize an article to use on social media, or to shorten an existing article to use in another way.

4. WILL AI BE REPLACING THOSE IN COMMUNICATIONS OR GRAPHIC DESIGN IN THE NEAR FUTURE?

Again, despite what you may be hearing in the media, AI will not likely be replacing our jobs any time soon (thank goodness!). However, in reviewing publications from

many public relations and association-related organizations, it is something that we should all be looking into and seeing how it can assist us in doing our jobs better, saving time, and overall simplifying writing and research for us.

5. WHAT WAS THE BIGGEST TAKE AWAY FROM THE DISCUSSION?

All who were present and using AI stressed that you can't simply take what AI creates for you and drop it into an email or a magazine. The content must be reviewed, massaged to your organization's voice, but also fact check, fact check and fact check. Fact checking was the biggest item of discussion for those who are actively using it. One member mentioned they were using it to create an itinerary for a trip and discovered one of the places AI told her to visit was permanently closed.

Want to hear more on AI? Join us for the July Coffee & Conversation where we will have a business professional who uses it daily discuss with us what they use it for and what to watch out for.

CAREER CENTER

POST YOUR JOB VACANCIES AT NO CHARGE

MSAE is pleased to announce that a new career page is available on our website and is ready to accept job postings. As an MSAE member, you can post your job vacancies at no charge! To post a position, complete the online form with the position title, organization/company name and logo, brief description, deadline to apply, and a link to either the job posting or association website. Here are some general guidelines for job postings:

- Membership status will be verified before posting is available on the website.
- Please allow 48 hours before your posting will appear on the page.
- Listings will be available online for 30 days or until the deadline to apply, whichever is earlier.
- MSAE is not responsible for incorrect listings or links.

<https://mosae.memberclicks.net/job-posting-request>



MSAE COFFEE AND CONVERSATIONS

July 11, 2024 • 8:00 am
Three Story Coffee
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