INSIGHT

Magazine

QUARTER 1 | 2025

MSAE

Why Use a Project Management System?

Find out a few things you may want to consider.

The Search for the Perfect AMS:

One association's journey to find the right fit.

INSIGHT Magazine

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MISSOURI SOCIETY OF ASSOCIATION EXECUTIVES

CONTENTS

AD INDEX

2025 MSAE BOARD OF DIRECTORS

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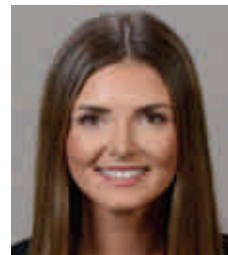
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Looking for a fun night out for your event attendees?

Hammons Field is the perfect spot for groups of all sizes. As the Double-A affiliate of the St. Louis Cardinals, you'll enjoy high-energy baseball, rising star athletes, endless entertainment, and of course, classic ballpark hotdogs.

Connect with Lisa Perez today to plan your perfect outing at the ballpark!
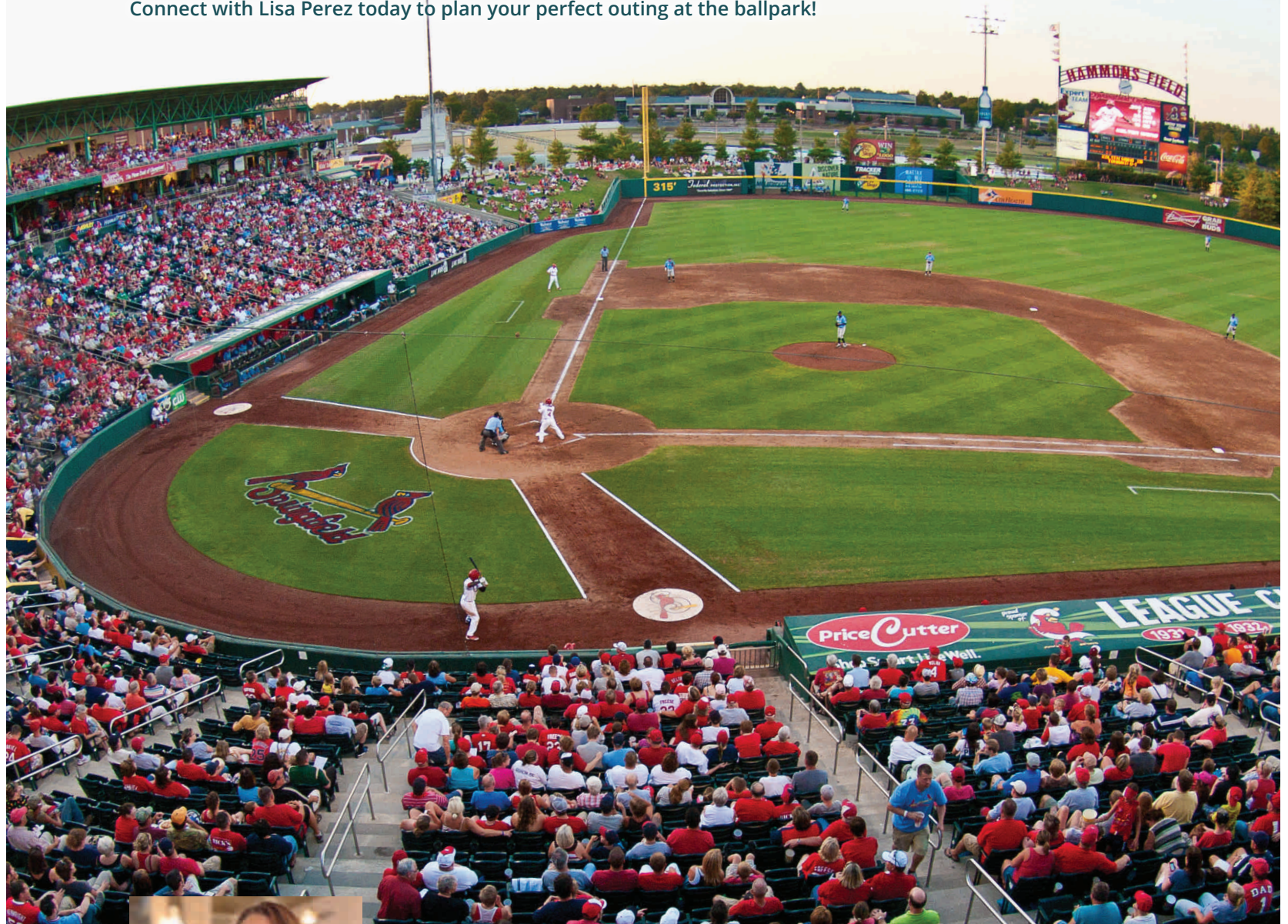
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From the President

PRESIDENT
GARY GATES

MSAE Members,

Welcome to the new year, and I hope 2025 has been well for you thus far. It is my honor to serve the members of MSAE this year, and I am incredibly excited to share the Board's vision to continue the upward trajectory this association has witnessed over the past few years.

Last October, the Board held its annual retreat to discuss MSAE's business and set goals for the coming year. We focused on Membership, Education, and Communications. Today, I want to share our membership goals and ways you, as a member, can assist us in achieving those goals!

Our priority is to retain 100% of the members from 2024. If you have not done so already, please consider renewing your membership for this year. In 2024, we held nearly two dozen events for Association professionals and executives. We look to match that and add more networking and educational events this year.

In addition to full retention from last year, we look to add more Association Members and Industry Partners. This is where we need your help. Next time you sign up for an event, take a minute to forward the registration information and a personal invitation to a colleague. If it is MSAE event Coffee & Conversations, an education event, or Holiday FunFest… be a liaison for MSAE. As they say, the more the merrier!

As we build our membership, MSAE looks to continue to build our brand as the resource for association management and hospitality industry professionals here in Missouri. Just as you work for your members in your respective industries, the MSAE Board and Staff continue to bring you the tools, resources, and network of professionals to aid you in your success.

Instead of the quick "I'm too busy" response when you see that MSAE email or flyer, try the "Let me make the time for me and my professional growth" approach in 2025 to see how it feels.

With gratitude for the opportunity to serve you,

Gary Gates

MSAE Coffee and Conversations

April 10, 2025 • 8:00 am

Missouri Association of Insurance Agents • 3315 Emerald Lane, Jefferson City, MO 65109

Topic: Time Savers, Tips and Tricks

Why Use a Project Management System?

Sarah Luebbert, APR, *Vital Strategies | President/CEO*

Project management systems have been around for years, but they have been receiving more attention in the last five years. Yet, many people are still not sure what a project management system is or why you or your organization would want to use them.

A project management system is usually an online product or downloadable system that is a structured method of managing, planning, organizing and collaborating on projects from start to finish. A project management system will have team assignments, timelines, budgets and processes to ensure you and/or your team successfully complete the project at hand.

Many people say they have this already set up in an Excel file or a Google Sheets or Google Doc. However, a project management system is is very different from the items previously mentioned as it can be used as a communication tool, a file storage system, and will remind you and your team when tasks are overdue.

So, why should you and/or your team switch from your Excel spreadsheet to a project management system? Here are a few things you may want to consider.

Make staff meetings more productive

Most organizations have staff meetings, they may be the entire staff, or a department or division meeting. However, most staff meetings are the same, you go through the group talking about upcoming projects, whose working on what projects, etc. What if your staff meetings could be about the big picture items such as your strategic plan, how to improve issues such as membership, or a presentation from a co-worker on a new system that is being implemented. By using a project management system, you can decrease the amount of time that people are reporting out on their projects, because the entire team, or those who need to access the information, can already see the status of projects in the project management system.

Even if you want to continue reporting out from teams and staff, a project management system can shorten your staff meetings because all projects/tasks are already available for viewing in the system. So, if nothing else, it can make your staff meetings shorter.

See the productivity levels of your team

If you conduct staff meetings, you may have noticed a common occurrence: one team member talks about their work for 15 minutes, while another presents their current projects in just three minutes. This disparity can lead you to wonder if the shorter report represents the entirety of that person's workload, while the longer report suggests that the other individual is extremely busy. However, the reality may be quite different. Without a project management system in place, the only way to gauge a person's productivity is by listening to their updates, unless you implement weekly written reports on ongoing projects.

By implementing a project management system, you can view exactly what your team is working on, and also see their productivity levels. Are they spending too much time on a small project and not enough time on a large project? Most systems have time tracking that you can ask your team to use if you have concerns about time management.

Additionally, you can use the project management system to quickly see your team's workloads. See what they are currently working on and what they have coming up, and decide if you need to adjust their workload.

Use it for interoffice communication and file collection

Most of us have been in this situation... you receive an email from a team member, and you have no idea which project they are referring to. The context of the email could apply to at least two projects you are working on, so you respond to your co-workers asking what they are referring to. This leads to a few more back-and-forth emails getting everybody on the same page.

With a project management system, your team will communicate inside the system, most often directly within a specific task or

Popular Project Management Systems

- **ASANA**
- **BASECAMP**
- **CLICKUP**
- **JIRA**
- **MONDAY.COM**
- **SMARTSHEET**
- **TRELLO**

project. This helps to avoid multiple emails because the team members can see exactly what task is being referred to.

We all have those team members whose inboxes are always at max capacity. If you ask them if they received something, it takes them 20 minutes to find it or figure out where they filed it. Having your team work in a project management system, the system becomes the file collector, so there is no longer a need to dig into an inbox to find the content.

Using a project management system allows all the necessary files for a project to be centralized in one location or connected through services like Google Drive, OneDrive, or websites. This means your team won't have to search for the list of speakers to add to the website; all the content is easily accessible within the system. The photos of the speakers will be stored in the project, the budget will be viewable by the team members who need it, and all documents shared among team members will remain in the system for easy access.

Having a project management system will also clearly define who is working on what and the due dates for all assignments. There will be no more back-and-forth emails saying this person thought the other person was working on it, and now it's due, and it's not complete.
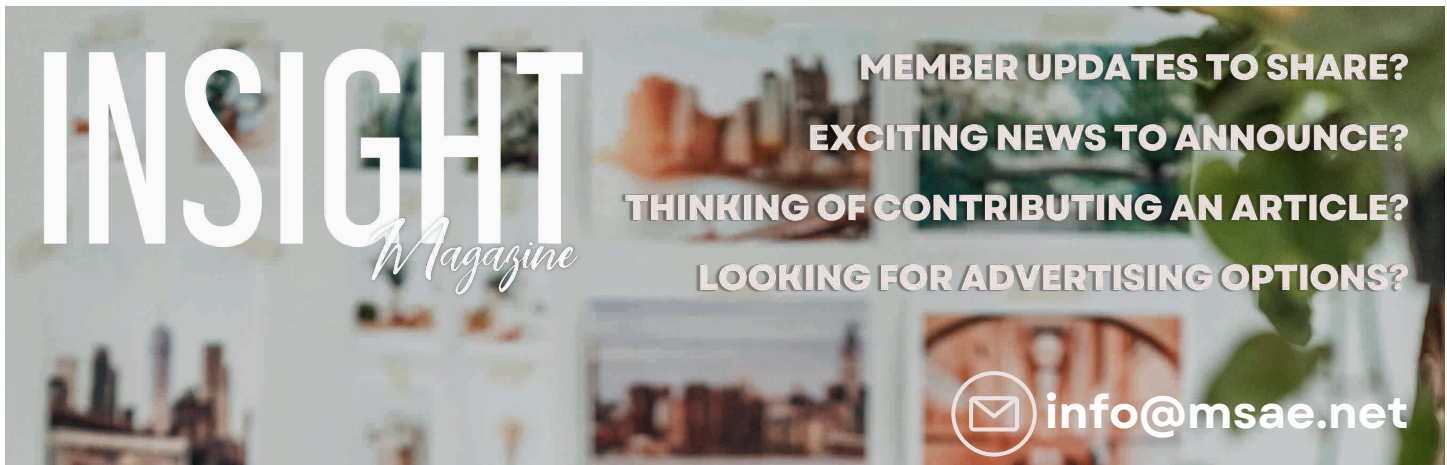
Silos do not exist in an association

Many association staff say they work in silos, but the reality is people may have assigned areas of work, but for projects, there is almost always more than one person touching that item during its lifetime. The most straightforward example is a meeting. Even a tiny meeting requires a planner, graphics, the event being added to a website, and the event being emailed to members. This means the meeting planner, the communications person, and likely the executive director or upper management person are involved. Having all these items available for the necessary teammates at their fingertips with a timeline, budget, marketing plan, etc., is the reason for implementing a project management system.

An amazing onboarding tool

Onboarding a new team member is something that very few organizations do well. Your new team member is assigned to a workspace, told to look through the files of their predecessor, look over the organization's website, and handed a workplace policy manual. A few days later, somebody comes in to make sure the new person came back to work, and the new person is sitting there with a blank look on their face because they are either overwhelmed or have no idea what they are supposed to be doing.

Asking a person to figure out their new job simply by looking through prior files is like asking a person to walk through a maze with a blindfold on. Many people hold the necessary information for their job in their heads, and even if you ask them to document things before they leave, only a portion of their documentation will be understood by an outsider. A project management system is the perfect tool for onboarding because you have historic processes/steps built into it from the prior year and recurring processes for the next project. If used properly, the system will also have communication exchanges, prior documents, etc., that a new employee can look through and start to understand things much more quickly. They can also see the prior timeline to know when things are to be completed for the current year. ◆

The Search for the Perfect AMS

Sarah Veile, CPRP, *Missouri Park & Recreation Association | Assistant Executive Director*

As association professionals, many of us are constantly looking for the perfect Association Management Software (AMS). When I joined the association industry, I found myself searching, but isn't that true across all industries? We're always looking for that one solution or tool that will streamline our work life and allow us to do more with our time.

While I got starry-eyed at the thought of finding the perfect AMS, I had no idea how many options were out there, what features were possible, or what kind of budget we'd need. I got my first taste of this when I responded to a monthly mailer from an AMS company—proof that mail marketing isn't dead! Their software had impressive features, but I knew I couldn't select the first option I saw, so I started exploring.

In my search, I stumbled upon ASAE's AMS Demo Days. After several demos, I started feeling overwhelmed by all the options and features. I shared my notes with my colleagues, but I was having difficulty comparing all the services equally. Our next step was to create a Request for Proposal (RFP) with a list of our needs, wants, and wishes. With many colorful sticky notes and several hours dreaming up the features we would want in the perfect AMS, we began drafting our RFP.

With more sticky notes than we could have imagined on the table before us, we began categorizing them as need to have, like to have, or cool to have (if the price was right).

We even added a list of features we didn't want, calling them 'deal breakers.' For example, we decided early on that we would not work with a company that priced their software based on the amount of data kept in the system. We did not want to pay more for our current system as our membership increased.

Our final list of features included problems we encountered with our current software, lessons learned at the Demo Days, and advice from other park and recreation associations around the country. With our RFP ready to go, I emailed it to the contacts I had acquired while searching.

As the RFPs came back, I organized responses in a spreadsheet and set up

interviews to discuss them further. We discussed things thoroughly, including our entire staff, before making our final decision — a choice that was not made lightly. After all, investing the time to learn how to use a new system means you want a long-term solution to avoid switching again in the near future.

Everyone's priorities and needs will be different, but for us, it was very important to have one main hub where our members could find everything. An important objective for us was to eliminate the need for multiple passwords and accounts to access association benefits. We wanted to work with a company that could do that and was willing to improve and grow with us.

Throughout the process, I learned that there is no perfect fit when looking for an AMS, but our process led us to software that meets most of our needs, fits within our budget, and works effectively. ◆

Seven Steps to Select the Best AMS for Your Association:

1. Research AMS companies that might fit your association well.

2. Create an RFP with a list of the features you need, want, and don't want.

3. Set a deadline for the RFPs to be returned.

4. Distribute RFP to the companies you think might be the best fit.

5. Collect the responses and organize the data to be compared with each other.

6. Set up demos with your top companies.

7. Select the best fit for you, your staff, and your members!

MEMBER NEWS AND UPDATES

Rebranding in Springfield

The Springfield, Missouri, Convention and Visitors Bureau is now officially **Visit Springfield, Missouri**! This rebrand celebrates the spirit of a city that's constantly growing, evolving and unveiling hidden gems for people to discover. Guided by what locals and visitors love most about Springfield and the Ozarks, we've crafted a message that resonates deeply, inspiring travelers to choose Springfield for their next adventure and driving positive growth for our community.

To bring this vision to life, we partnered with Heart+Mind Strategies, a marketing research firm, to gather insights through surveys, interviews and focus groups with locals, visitors and stakeholders. With that foundation, we teamed up with local agency Revel Advertising to create a fresh brand voice, logo, graphics and more. While our brand may be new, our mission remains the same: showcasing Springfield as a must-visit destination to strengthen our economy. Visit Springfield is here to invite the world to experience this city in the Ozarks—a city that is truly naturally original.

MAIA Welcomes Two New Team Members

Missouri Association of Insurance Agents (MAIA) is excited to welcome two new members to our team. **Joe Lawton**, Director of Marketing and IT, joins MAIA from Lost Valley Lake Resort where he served as IT Manager. **Mary Feller**, Marketing Coordinator, joins MAIA from The News Tribune where she served as a Design Editor. In their new roles, they will join the marketing team, and assist with marketing, publishing, advertising, class administration and events.

Staff Updates at MAFP

The Missouri Academy of Family Physicians has announced the promotion of **Bill Plank, CAE** to the position of Executive Director. In this new capacity, Plank will serve as the chief administrative officer and conduct the activities of the Academy as determined by the Board of Directors. Plank has served as the Assistant Executive Director since joining MAFP in 2020.

Prior to joining MAFP, Plank spent over 15 years in private industry with a focus on the financial services sector where he held several leadership and community-focused roles. Leaning on his community involvement, he realized a passion for association work and made a career switch to serve a greater purpose. Upon joining MAFP, Bill quickly shifted his focus to association and non-profit work earning the Certified Association Executive credential from the American Society of Association Executives and achieving the American Academy of Family Physicians Family Medicine Champion designation. He currently serves as the President-elect of the Missouri Society of Association Executives.

The Missouri Academy of Family Physicians is also thrilled to welcome **Andrea Holloway** as its new Member Experience Manager.
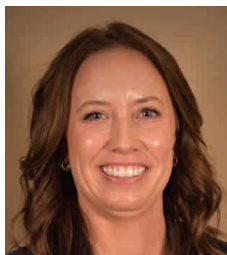
With a deep passion for advancing healthcare and a proven track record in nonprofit leadership, substance use disorder treatment, and public health advocacy, Holloway brings invaluable experience to MAFP's mission.

In this role, Holloway will drive membership education, growth, and support, while strengthening outreach, engagement, and content development. Through these efforts, MAFP members will gain even greater access to resources, networking opportunities, and professional development to enhance the impact of family medicine across Missouri.

In her leadership role at a nonprofit dedicated to prevention efforts for youth and adults, she played a vital part in community-based initiatives aimed at reducing substance use and promoting mental wellness. Additionally, Holloway has worked as a substance use disorder treatment counselor, guiding individuals through recovery and support services.

Holloway has also contributed to government-led efforts addressing substance use disorder and mental health challenges, working to advance policies and programs that support individuals and families in need. Most recently, she has been involved in the development of acute withdrawal management services within a hospital setting, ensuring access to critical care for those struggling with substance use.
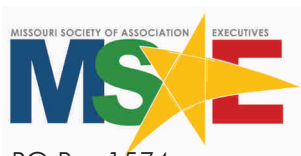
2025 Coffee & Conversations

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.

MISSOURI SOCIETY OF ASSOCIATION EXECUTIVES
MSAE

Educate

Network

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