

ADVOCATING FOR A STRONGER WORKFORCE

HANDBOOK

 **THE POWER OF
ASSOCIATIONS**
PURPOSE. COMMUNITY. IMPACT.

**#PowerOfAssociations
#AAD23**

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#PowerOfAssociations
#AAD23

American Associations Day 2023

Letter from the President and CEO

Michelle I. Mason, FASAE, CAE



Dear Association Advocates:

Welcome to American Associations Day 2023! We are so happy to host you in Washington, DC, as we promote associations on Capitol Hill. American Associations Day is designed to inform legislators and Congressional staff about the Power of Associations—how our community contributes in direct and significant ways to economic development and societal advancement.

Thank you for spending time with ASAE and your peer-leaders in our community. We are grateful that you're bringing your unique experience and perspective to help build up associations in Congress, which will go a long way toward helping to build up the industries and professions we support.

Our collective voice makes a difference. Look no further than associations' steadfast advocacy to expand the Paycheck Protection Program (PPP) for thousands of associations, which helped protect many more thousands of jobs and reinforce our community's role to support American economy and society. This happened because we stuck together and spoke as one—our community received at least \$1.2 billion in critically needed PPP funds. Your advocacy, commitment and hard work helped secure this lifeline.

Each year brings new challenges but also new opportunities to inform legislation that impacts our community and constituents. This year is no different, and we are concentrating our energy on legislation to build up the workforce and help strengthen our economy: The Freedom to Invest in Tomorrow's Workforce Act (H.R. 1477 / S. 722). Importantly, this legislation is bipartisan and would increase access not only to industry and professional certifications, but to tax-advantaged 529 savings plans that help establish career growth and earning power. Certifications are a pathway to opportunity in many fields, from entry-level jobs to mid-career certifications and those that demonstrate highly specialized knowledge and experience.

As we urge Congress to create sensible solutions for the nation's problems, we also have an opportunity to demonstrate a hallmark of all associations—finding connections and common purpose. We are stakeholders in the political process and can put divisions aside to build on common ground and support our country. We want lawmakers and their staff to know that associations stand ready to work with them and help transcend "politics as usual;" to engage in a constructive, civil discourse that promotes conscious inclusion; and to find solutions on issues that matter to all Americans.

Thank you for your invaluable efforts on behalf of our community. I hope you enjoy American Associations Day 2023.

Sincerely,

A handwritten signature in black ink that reads "Michelle I. Mason". The script is elegant and cursive.

Michelle I. Mason, FASAE, CAE
President & CEO
ASAE

Agenda

Monday, March 27

12:00-1:00 pm **Registration and State Group Meetings**

1:00-1:15 pm **Welcome Remarks from ASAE Leadership**

SPEAKERS

Michelle I. Mason, FASAE, CAE

President & Chief Executive Officer, ASAE

Lakisha Ann Woods, CAE

Chair, ASAE Board of Directors

Chief Executive Officer, The American Institute of Architects

Margarita L. Valdez Martínez

Chair, ASAE Public Policy Committee

Director of Policy and Advocacy, American Society of Gene & Cell Therapy

1:15-1:55 pm **Bringing the Power of Associations Message to Congress**

SPEAKERS

Mark N. Dorsey, FASAE, CAE

Chair, ASAE Power of Associations Oversight Committee

Chief Executive Officer, Construction Specifications Institute

Steven C. Anderson, FASAE, CAE, IOM

Immediate Past Chair, ASAE Board of Directors

President & Chief Executive Officer, National Association of Chain Drug Stores

Philip Bell

Member, ASAE Board of Directors

President, Steel Manufacturers Association

Heidi Brock

Secretary-Treasurer, ASAE Board of Directors

President and Chief Executive Officer, American Forest & Paper Association

1:55-2:45 pm **Association Policy: Workforce Development**

SPEAKERS

Jeff Evans

Director, Public Policy, ASAE

Denise Roosendaal, FASAE, CAE

Executive Director, Institute for Credentialing Excellence

Craig J. Saperstein, J.D.

Partner, Pillsbury Winthrop Shaw Pittman LLP

2:45-2:55 pm **Break**

Agenda

Monday, March 27

| | |
|---------------------|---|
| 2:55-3:50 pm | Hill Meetings: Maximizing Your Role in the Political Process |
| SPEAKERS | David Lusk Chair, ASAE Government Relations & Advocacy Professionals Advisory Council Founder, Key Advocacy Lynda J. Patterson, FASAE, CAE Chair-Elect, ASAE Board of Directors Chair, ASAE Research Foundation President & Owner, AMPED Jeff Evans Director, Public Policy, ASAE |
| 3:50-4:00 pm | Break |
| 4:00-5:00 pm | Diversity, Equity & Inclusion in Advocacy |
| SPEAKERS | Margarita L. Valdez Martinez Chair, ASAE Public Policy Committee Director of Policy & Advocacy, American Society of Gene Cell Therapy Lisa M. Greenhill, MPA, EdD Senior Director for Institutional Research & Diversity American Association of Veterinary Medical Colleges Hassana Howe, CAE Chief Experience & Engagement Officer, American Physical Society Sheri Sesay-Tuffour, PhD, CAE, ICE-CCP Member, ASAE Board of Directors Chief Executive Officer, Pediatric Nursing Certification Board |
| 5:00-5:15 pm | State Group Planning |
| 5:15-5:25 pm | Final Send Off |
| | SPEAKER Mary Kate Cunningham, CAE Senior Vice President, Public Policy, ASAE |

Tuesday, March 28

| | |
|------------------------|---|
| 9:00 am-5:00 pm | Hill Meetings |
| 9:00 am-5:00 pm | Home Base: American Traffic Safety Services Association Office 512 8th Street, SE, Washington, DC 20003 |
| 12:00-2:00 pm | Lunch at Bullfeathers on the Hill 410 First St SE, Washington, DC 20003 |

Program Speakers



Michelle I. Mason, FASAE, CAE

President & Chief Executive Officer, ASAE

Michelle Mason serves as the President & CEO of the American Society of Association Executives (ASAE). She is passionate about the advancement of the professional practice of association management. Prior to ASAE, Michelle served as the President and CEO of Association Forum for seven years; as Managing Director of Strategy and Innovation at the American Society for Quality (ASQ); and Vice President of Strategic and Future Focused Research Programs at ASAE. Michelle currently serves on Destinations International Foundation, and Tourism Diversity Matters (TDM). Michelle is a Chicago Business Journal Women of Influence Honoree 2019, Chicago Defender Women of Excellence Honoree 2019, and the CEO Update Professional Society CEO of the Year 2020. Michelle is a certified association executive (CAE), Fellow of the American Society for Association Executives (FASAE) and a Certified Quality Improvement Associate (CQIA).



Lakisha Ann Woods, CAE

Chair, ASAE Board of Directors

Chief Executive Officer, American Institute of Architects

Lakisha Ann Woods, CAE, is the EVP/Chief Executive Officer of the American Institute of Architects (AIA), a dynamic network of more than 94,000 architects and design professionals throughout 200 chapters committed to enhancing the built environment.

Woods previously served as President & CEO of the National Institute of Building Sciences (NIBS) where she led efforts to expand the organization's programs and markets while growing and strengthening its membership base. Prior to joining NIBS, she was the Sr. VP & Chief Marketing Officer at the National Association of Home Builders (NAHB), where her team was responsible for all marketing and revenue-generating programs - including marketing the International Builders Show, sponsorship sales and partnerships with major national companies.

Woods is the author of the book *Never Get Their Coffee: Empowering Fearless Leadership* and currently serves as Chair of the Board for the American Society of Association Executives (ASAE). She also currently serves on the Board of Visitors for the University of Maryland School of Architecture, previously served as Vice Chair of the U.S. Green Building Council Board of Directors and is a global speaker. She holds a Bachelor of Science degree from the University of Maryland in College Park and lives with her husband and daughter in Howard County, Maryland.

Program Speakers



Margarita L. Valdez Martínez

Chair, ASAE Public Policy Committee

Director of Policy and Advocacy, American Society of Gene & Cell Therapy

Margarita Valdez Martínez is the Director of Policy and Advocacy for the American Society of Gene and Cell Therapy (ASGCT), the primary professional membership organization for gene and cell therapy. Through her work at ASGCT, Margarita seeks to advance the Society's priorities in policy development amongst legislators, providers, patient advocates, coalitions, and other stakeholders. With over 20 years of experience, she has a demonstrated history of success in health policy.

Prior to joining ASGCT, Valdez Martínez was the senior lobbyist for the American Society for Radiation Oncology (ASTRO). In that role, she developed, strategized, and advocated for the physician and professional member's policy priorities. Her efforts helped lead to payment stability for the membership through legislative and regulatory wins. She has also worked extensively with patient advocates; most notably during her tenure at the National Breast Cancer Coalition where she successfully advanced legislative strategies by leveraging a broad volunteer base which resulted in securing \$120M for the Department of Defense's Breast Cancer Research Program. And prior to that, while working at the American Health Information Management Association, Margarita helped launch a broad-based coalition to secure implementation of the 10th revision of the International Statistical Classification of Diseases.

Valdez Martínez earned her undergraduate degree at Michigan State University, she currently serves as the Chair of Public Policy for the American Society of Association Executives, serves on the pastoral council for the Cathedral of St. Matthew the Apostle, and is a board member for the HER Foundation which supports women and families experiencing hyperemesis gravidarum. She currently lives in Washington, DC, with her husband, Miguel.



Mark Dorsey, MBA, FASAE, CAE

Chair, ASAE Power of Associations Oversight Committee

Chief Executive Officer, Construction Specifications Institute

Mark has always been drawn to turning complex and seemingly intractable problems inside out and upside down by asking tough questions—in service to making society better, safer, and smarter. He views this as a hallmark of his career from when he started working in a manufacturing plant at age 13 to his work now as CEO of the Construction Specifications Institute. He sees his role as bringing an entrepreneurial spirit, intellectual curiosity, and rigor to create new and different solutions to age-old challenges. His daily focus is galvanizing teams to adapt, synthesize new ideas, and execute at the highest level in a rapidly shifting environment.

Since joining the 7,000 member Construction Specifications Institute as CEO in 2015, the association has doubled its assets, radically changed its governance structure and strategic approach, launched a for-profit subsidiary, and revamped content, learning, and credentialing, resulting in its best performance in two decades.

Program Speakers



Steven C. Anderson, FASAE, CAE, IOM

Immediate Past Chair, ASAE Board of Directors

President and Chief Executive Officer, National Association of Chain Drug Stores

Steven C. Anderson FASAE, CAE, IOM is President and Chief Executive Officer of the National Association of Chain Drug Stores (NACDS), a position he assumed in 2007. Before joining NACDS, Anderson was President and Chief Executive Officer of the National Restaurant Association for eight years. In addition, Anderson held several management positions at the American Frozen Food Institute before becoming the trade association's President and Chief Executive Officer, a position he held for ten years. Before entering the association profession, Anderson was a candidate for the U.S. House of Representatives for the 16th Congressional District of Illinois. Anderson is currently the Immediate Past Chair of the Board of Directors of the American Society of Association Executives.



Philip K. Bell

Member, ASAE Board of Directors

President, Steel Manufacturers Association

Philip K. Bell is President of the Washington, DC-based Steel Manufacturers Association. Prior to leading the SMA, Phil served as Director of External Communications and Public Affairs for Gerdau Long Steel North America based in Tampa, FL. He is a 25-year industry veteran, who developed an interest in the steel industry and manufacturing in the late 1980s while working in maintenance and operations at Elementis Chromium in Corpus Christi, TX. He has held executive-level positions in operations, human resources and public affairs with Gerdau, the SGL Carbon Group, and Qualitech Steel Corporation.

He currently serves on the U.S. Department of Commerce International Trade Advisory Committee on Steel (ITAC 11), advising the Secretary of Commerce and United States Trade Representative on trade policy, trade agreements, and other trade related matters that benefit U.S. businesses, workers, and the economy.

Phil is on the board of directors of the National Association of Manufacturers (NAM) and the American Society of Association Executives (ASAE). He is also a member of the Association of Iron & Steel Technology and serves on the board of trustees at Hamline University in St. Paul, MN.

Phil graduated from Texas A&M University - Corpus Christi with a bachelor's degree in Psychology. He holds a master's degree in Global Strategic Communications from the University of Florida.

Program Speakers



Heidi Brock

Secretary-Treasurer, ASAE Board of Directors

President and Chief Executive Officer, American Forest & Paper Association

As President and CEO of the American Forest & Paper Association (AF&PA), Heidi Brock serves as the chief advocate for paper and wood products manufacturers. AF&PA member companies make essential products from renewable and recyclable resources, generate renewable bioenergy and are committed to continuous improvement through the industry's sustainability initiative – Better Practices, Better Planet 2030: Sustainable Products for a Sustainable Future.

Brock joined AF&PA in 2019, establishing a strategic vision for the organization that has strengthened AF&PA's advocacy mission and increased membership. Brock guided AF&PA throughout the COVID-19 pandemic with a steadfast focus on workplace safety and ensuring manufacturers can continue to deliver essential products. Under Brock's leadership, AF&PA launched an award-winning website and earned two ASAE Silver Awards for communications efforts. In 2022, Brock was named one of Washington's 500 Most Influential People by Washingtonian Magazine.

Brock serves as the Vice President of the International Council of Forest & Paper Associations (ICFPA) and Secretary-Treasurer of the American Society of Association Executives (ASAE) and ASAE Research Foundation Boards of Directors. She is a member of the Advisory Committee on Sustainable Forest-based Industries (ACSF) and serves on the National Association of Manufacturers' (NAM) Council of Manufacturing Associations (CMA) Board of Advisors. She sits on the University of Puget Sound Board of Trustees, the Bryce Harlow Foundation Board of Directors, the U.S. Chamber's Committee of 100, and the DC Central Kitchen Board of Directors. She is also an active fellow of the US-Japan Leadership Program. In 2018, Brock was awarded the CMA Leadership Award to recognize her work to promote sustainability and manufacturing.

Prior to joining AF&PA, Brock served as President and CEO of the Aluminum Association from 2011-2019, where she led two significant and successful trade enforcement cases for the aluminum industry, while also achieving record membership levels. Brock previously served in various roles during an 18-year tenure at Weyerhaeuser, including Vice-President of Federal and International Affairs. She also served on the staffs of former U.S. Senators Dan Evans and Slade Gorton.

Brock received a bachelor's degree in English literature and economics from the University of Puget Sound and a master's degree in business administration from Georgetown University. She is married to the Reverend Charles Brock and they have a son, Samuel.

Program Speakers



Jeff Evans

Director, Public Policy, ASAE

Jeff Evans serves as Director of Public Policy for ASAE and advocates for the association community on state and federal tax policy, financial services and workforce development issues, among others. Amid the pandemic, Jeff's steadfast advocacy played a critical role to help secure billions of dollars in job-saving relief for associations. Jeff's work has helped position ASAE as a leading voice to establish a pandemic risk coverage program necessary to protect jobs and associations' fundamental role to promote America's economy. He is closely involved with federal and state legislative initiatives that affect the certification community and shaped economic development policies to support American workers and industries as they navigate a dynamic workforce.

Jeff began his career on Capitol Hill, has worked in the nonprofit community for more than 10 years and proudly represents the power of associations every day. He was recognized as a top association lobbyist by the Advocacy Association, Association TRENDS and The Hill.



Denise Roosendaal, FASAE, CAE

Executive Director, Institute for Credentialing Excellence

Denise is a thirty-year (plus) veteran of association management. She has served as Executive Director for the Institute for Credentialing Excellence for ten years. Her undergraduate Bachelor of Arts degree is from the University of Virginia. Her Masters of Arts in Public Administration is from Syracuse University. Denise earned her Certified Association Executive certification in 2001 and was named an ASAE Fellow in 2022. She has also served as Executive Director of a regional REALTORS® Association (1999-2012) and the American Evaluation Association (2013-2017). Denise co-authored the chapter on the topic of credentialing in the ASAE Handbook of Professional Practices in Association Management, third edition and fourth edition. She is the 2018 recipient of the Ben Shimberg Public Service Award given annually by the Citizen's Advocacy Center. The I.C.E. Management Team was named by Smithbucklin as recipient of the Association of Excellence Award in 2021. She has served as a CAE Commissioner and on the ASAE Professional Development Section Council. She is currently serving on the Advisory Group for the ASAE Foresight Works Project and has been named as its vice chair for 2023.

Program Speakers



Craig J. Saperstein, J.D.

Partner, Pillsbury Winthrop Shaw Pittman LLP

Craig Saperstein assists clients in developing and implementing sophisticated government relations strategies at the federal and state levels that are geared to provide a demonstrable return on investment. Craig lobbies on behalf of corporate, nonprofit, foreign sovereign, and public sector clients in Congress, the Executive Branch, and state and local governments. He represents clients on a variety of policy issues, including financial services, cybersecurity, international trade, veterans, energy, economic development, transportation, and health care matters.



David Lusk

Founder, Key Advocacy

David is best described as a thought-leader on advocacy and its best practices. His firm's clients include some of the nation's largest corporations, such as Microsoft, as well as many leading professional organizations and medical societies, including the American College of Cardiology, American Library Association, American Medical Association and The Nature Conservancy.

David brings more than two decades of policy experience to bear in developing customized and highly effective advocacy programs for associations, nonprofits and private businesses across the country. He has helped clients testify before Congressional panels, federal officials and state lawmakers, and helped inspire association members, executives and nonprofit volunteers to become powerful ambassadors for the policy changes they seek. Since 2010, he has provided highly customized training for Capitol Visit Days and conducted 365-engagements to over 11,000 association members, nonprofit volunteers and C-Suite executives. David also serves in leadership for the American Society of Association Executives as the chair of its Government Relations and Advocacy Professionals Advisory Council (GRAPAC). A graduate of Brown University, he has degrees in both Public Policy and Business Economics.

Program Speakers



Lynda J. Patterson, FASAE, CAE

Chair-Elect, ASAE Board of Directors
Chair, ASAE Research Foundation
President & Owner, AMPED

Lynda Patterson founded AMPED Association Management in 2008, following her passion of helping non-profits operate effectively and grow to meet their goals. AMPED empowers volunteer leaders to lead rather than manage staff and operations. Her team has grown to over 50 staff across their offices in Madison, WI, Washington DC, Sacramento, CA and remote home offices. AMPED clients are diverse by design, representing trade associations, professional societies, and philanthropic foundations. Sample client industries include multiple sclerosis research, air filtration, industrial belting, heavy equipment management, fantasy sports, women in trucking, and women in government relations. See AMPED's current association client list at www.manageassociations.com.

With 30 years' experience as a CEO, Lynda is a Certified Association Executive (CAE) and Fellow of the American Society of Association Executives (FASAE) as well as a DELP mentor. Lynda serves as Chair-Elect of the ASAE Board of Directors and Chair of the ASAE Research Foundation Board and ASAE AMC Key Committee. She also serves on several destination marketing organization advisory boards, a bank board, and an angel investor group. Lynda also serves on the Board of Directors of Make A Wish, Wisconsin and stays active with friends, family, and four adult children.



Lisa M. Greenhill, MPA, EdD

Senior Director for Institutional Research & Diversity, American Association of Veterinary Medical Colleges

Lisa Greenhill currently serves as the Senior Director for Institutional Research and Diversity at the Association of American Veterinary Medical Colleges (AAVMC). Dr. Greenhill directs the Association's internal study of academic veterinary medicine through collaborative research, analysis and publication efforts. She also manages the DVM: DiVersity Matters initiative, which promotes increased representation of underrepresented persons in academic veterinary medicine, inclusive academic environments and the inclusion of diversity-related professional competencies in the DVM curriculum. Dr. Greenhill previously served nearly three years with the AAVMC, during which time she managed legislative and regulatory policy issues including agriculture production, biomedical research, professional education, food safety and environmental health. She holds a Masters in Public Administration with a concentration in public policy from George Mason University in Fairfax, VA and a Doctorate in Education from Benedictine University in Lisle, IL.

Program Speakers



Hassana Howe, CAE

Chief Experience & Engagement Officer, American Physical Society

Hassana is currently Membership Director at NQF and has 17 years of non-profit C-suite experience. At NQF, she oversees strategic member growth and engagement for a healthcare trade organization that works to advance equitable quality healthcare nationwide. She leads membership engagement, technology, sales, marketing, and DEI efforts, resulting in 11% member growth.

Formerly at the WICT Network, she served as the Vice President of Member and Chapter Development, overseeing 10,500 members, 500 volunteers, and 24 chapters covering the US, Latin America, and Europe. During her tenure, her strategic efforts led to 17% revenue growth via member engagement, data-driven marketing, and technology. She managed hundreds of global chapter events annually and expanded WICT's footprint in Mexico and the Netherlands. A frequent speaker, she advocated for gender diversity and the advancement of women in cable, media, and technology domestically and internationally.

Prior, Hassana spent twelve years with PDA, a professional society advancing global pharma/biopharma manufacturing science and regulation to serve patients better. She managed 10,000 members, thousands of volunteers, and 24 chapters covering the US, Latin America, Europe, and Asia. Her accomplishments at PDA were 35% revenue growth via strategic member engagement, marketing, communication, technology, and partnerships. She led efforts to expand PDA's chapter footprint into global markets, including Brazil and Cuba.

A self-described "scientist with a heart," Hassana has a B.S. in Microbiology from North Carolina State University and is bilingual in Spanish and English. Well-traveled and has lived or worked in 16 countries across North America, South America, Europe, the Middle East, Asia, and Africa.

Hassana is a Certified Association Executive (CAE), accredited by the American Society of Association Executives (ASAE), earned by only 5% of non-profit executives. She's also the current Chair of the ASAE CAE Exam Committee and serves on the awards and recognition committee for Association Latinos. Her name, Hassana, is Arabic and means good deed, a kind act, or favor. She tries to live up to her name every day.

Program Speakers



Sheri Sesay-Tuffour, PhD, CAE, ICE-CCP

Member, ASAE Board of Directors

Chief Executive Officer, Pediatric Nursing Certification Board

Currently serving as CEO of the Pediatric Nursing Certification Board, the largest organization in the U.S. representing over 56,000 pediatric nurses and pediatric nurse practitioners, Dr. Sheri Sesay-Tuffour's professional experience includes more than 20 years in the association sector, primarily with healthcare related organizations such as the American College of Nurse Midwives (CEO), the Heart Rhythm Society (VP of Operations), and the International Board of Heart Rhythm Examiners (Executive Director).

Her leadership and management principles are based on a simple doctrine — do unto others as you would have them do unto you. Sheri is a results-driven healthcare executive with proven ability to direct financial and business operations and to shift the paradigm of a company to create desired results. As a hands-on leader, she transforms organizations by leading through vision setting, inspiring staff to take ownership and accountability in creating change, and by aligning programs with strategic goals to achieve measurable results. She has led health policy initiatives, revenue diversification and member development strategies, large-scale domestic and global project portfolios, inclusion programs, and cross-functional employee teams.

Sheri represents several industry-leading organizations, standing committees and advisory groups. She is a board member of the American Society of Association Executives Board of Directors, the Institute for Credentialing Excellence Board of Directors, the West Virginia State University Foundation Board, and the District of Columbia Historically Black Colleges and Universities Alumni Alliance Board of Directors. She speaks regularly on topics of strategy, leadership, inclusion, and talent management. Sheri holds a doctorate degree in organizational leadership from The Chicago School of Professional Psychology, a master's in science administration from Trinity University, and a bachelor's in communications from West Virginia State University.



Mary Kate Cunningham, CAE

SVP, Public Policy, ASAE

Mary Kate Cunningham, CAE is the Senior Vice President of Public Policy at ASAE: The Center for Association Leadership. Throughout her more than ten years at ASAE, Mary Kate has grown an effective, results-oriented advocacy team; garnered bipartisan support for association issues; and expanded ASAE's grassroots network.

She was recognized by the National Institute for Lobbying & Ethics in 2021 and by The Hill in 2021 and 2022 as a Top Association Lobbyist. Prior to joining ASAE, Mary Kate worked at the House Armed Services Committee and the Federation of American Scientists. Originally from Arizona, she earned an M.A. from the National Defense University and a B.A. from The Catholic University of America. Mary Kate is a Certified Association Executive and serves on the board of directors for the Tax Coalition.

American Associations Day 2023

Hill Meeting Prep Doc

Primary Goals

1. Add cosponsors and build support for the Freedom to Invest in Tomorrow's Workforce Act (H.R. 1477 / S. 722)
2. Build awareness of the association community and the Power of Associations

Freedom To Invest In Tomorrow's Workforce Act - H.R. 1477 / S. 722

Our “ask” is for each Member and Senator we meet with to join the legislation as a “cosponsor.”

- The Freedom to Invest in Tomorrow's Workforce Act is bipartisan and bicameral.
- It would expand eligible uses of 529 education savings plans to include economy-building certifications and other post-secondary credentials.
- **House of Representatives leads for H.R. 1477** are Representatives Rob Wittman (R-VA) and Abigail Spanberger (D-VA). There are no additional cosponsors for H.R. 1477.
- **Senate leads for S. 722** are Senators Amy Klobuchar (D-MN) and Mike Braun (R-IN). Cosponsors for S. 722 are Senators Tammy Duckworth (D-IL), Susan Collins (R-ME), Dianne Feinstein (D-CA), Joe Manchin (D-WV), Martin Heinrich (D-NM), Peter Welch (D-VT) and Tommy Tuberville (R-AL).

General Talking Points

- Associations nationwide pay approximately \$20 billion in wages
- As a community, associations are the largest provider of post-college education and skills training.
- Certifications provide pathways to opportunity and career growth across sectors—from entry-level jobs to mid-career certifications that help workers advance, to certifications that demonstrate highly specialized knowledge, skills and experience.
- The Freedom to Invest in Tomorrow's Workforce Act would provide Americans access to more – and more affordable – career pathways, no matter their educational background, skill level or age. The bill opens up tax-favored 529 plans for use by more Americans and those at all income levels.
- Expanding eligible uses for 529 plans would benefit all industries and professions that rely on employees with specialized training or recognized credentials.
- Certification reduces the racial wage gap among men by 43% and the gender wage gap between women and white men by 36-40%, according to the University of Chicago.
- The legislation would also help displaced workers, professionals seeking to transition careers, veterans, military spouses, caregivers reentering the workforce and those just beginning a career.

Meeting Process & Tips

- **Before meetings** - practice your introduction and elevator pitch; practice explaining the legislation. Determine who will begin and end each meeting and who will take notes.
- Open meetings with thanks to staffer(s) for taking the time to meet.
- Provide a brief introduction of yourself, ASAE's event, your organization and stakeholder community.
- **Introduce the “ask”** - “We urge your boss to cosponsor the Freedom to Invest in Tomorrow's Workforce Act and appreciate any consideration to join the bill.”
- Explain the legislation, how it would benefit the workforce and the value of certification and skills training. Tie to your organization's sector, if possible.
- **Restate the “ask” and share the leave-behinds** (i.e., legislation document and community sign-on letter).
- Thanks staffer(s) again for their time and close the meeting.
- Connect with ASAE staff, provide urgent meeting updates and complete the post-meeting online form.

Support for the Freedom to Invest in Tomorrow's Workforce Act

The bipartisan, bicameral Freedom to Invest in Tomorrow's Workforce Act (S. 722 / H.R. 1477) would expand eligible uses of tax-favorable 529 savings plans ("529") to cover costs associated with workforce training and credentialing programs, such as professional certifications. This bill would provide valuable tax-advantaged resources for workers who pursue alternative career pathways, mid-career changes or career growth.

Senate Leads (S. 722)

Sen. Amy Klobuchar (D-MN)

Sen. Mike Braun (R-IN)

House Leads (H.R. 1477)

Rep. Rob Wittman (R-VA)

Rep. Abigail Spanberger (D-VA)

Senate Cosponsors

Sens. Tammy Duckworth (D-IL), Susan Collins (R-ME), Dianne Feinstein (D-CA), Joe Manchin (D-WV), Martin Heinrich (D-NM), Peter Welch (D-VT) and Tommy Tuberville (R-AL)

The American Society of Association Executives (ASAE) is proud to support this legislation.

Expanding eligible uses for 529 plans would empower workers of any educational background, skill level or age and would benefit all industries and professions that rely on employees with specialized training or recognized credentials.

What are 529 Savings Plans?

529 plans are state-sponsored savings vehicles for higher education that are exempt from federal taxes if funds are used to pay for qualified education expenses, which include: college, graduate or professional degrees; career and technical education programs from Title IV accredited institutions; registered apprenticeship programs; and up to \$10,000/year in elementary or high school tuition and certain student loan repayments.

Training, Certifications and Other Credentials are Ineligible Under 529 Plans

The American workforce is comprised mostly of middle-skill jobs that require more than a high school education but not a bachelor's degree, according to the National Skills Coalition. A differentiator for obtaining jobs in the 21st century economy is professional certification—for workers with or without a college degree.

Certifications Promote Economic Opportunity and a Resilient Workforce

Professional certifications provide pathways to opportunity and career growth across economic sectors—from entry level jobs to mid-career certifications that help people advance, to certifications that demonstrate highly specialized knowledge and skills. Certification reduces the racial wage gap among men by 43% and the gender wage gap between women and white men by 36%-40%, according to a University of Chicago report.

Staff Contacts & More Information

Rep. Wittman Will Sroka - will.sroka@mail.house.gov

Rep. Spanberger Rebecca Eichmann - rebecca.eichmann@mail.house.gov

Sen. Klobuchar Max Hurst - max_hurst@klobuchar.senate.gov

Sen. Braun Robert Ordway - robert_ordway@braun.senate.gov

The Freedom to Invest in Tomorrow's Workforce Act Would Provide Economic Flexibility and Opportunity

American workers and families could use up to \$10,000/year of their 529 plans to help cover:

- Certification program tuition;
- Testing fees, including practice exams;
- Required books and equipment;
- Continuing education and certification renewal; and
- Other charges required to obtain and maintain a certification.

Dear Association Advocate:

ASAE is grateful for your time to read the following Power of Associations community sign-on letter and for your consideration to join. **This cover page outlines the letter and its purpose.** [Follow this link](#) to add your organization's name. Please note that the signatory list will not include individuals' names.

Why do we need a Power of Associations community sign-on letter?

Policymakers mischaracterized our community and excluded associations from major financial relief programs during the pandemic's first year in 2020. As a result, almost 9,000 associations and allied organizations joined together on three sign-on letters, which helped demonstrate to Congress that associations support our economy and society. Congress, in turn, allowed most associations to access critically needed financial relief in 2021.

We must remain vigilant and continue to share the Power of Associations with "each policymaker in America" to ensure we are not again mislabeled—to showcase our "deep-rooted and wide-ranging benefits to our nation."

What are the letter's main points?

The letter begins: "The Power of Associations Supports Policymaking and Champions Each Industry, Profession and Worker. Please Utilize Associations and Their Staff as Resources to Inform and Assist Your Critical Policymaking Efforts." The letter continues with evidence-based declarations of our community's positive impact on America:

- *Associations Help Create and Protect Jobs*
- *Associations Educate, Train and Certify the Workforce*
- *Associations Conduct Events that Produce Significant Economic Activity*
- *Associations Set Product, Service and Safety Standards*
- *Associations Provide Essential Technical and Subject-Matter Expertise*
- *Associations Promote Diversity, Equity and Inclusion*

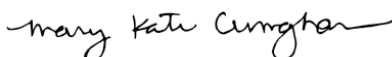
The letter concludes: "Our community stands ready to share The Power of Associations with your team and provide support as you consider important public policies. Associations and their dedicated teams champion every American industry, profession and worker—The Power of Associations champions America."

Who can join and who will receive the letter?

We strongly encourage signatories to ask their members and networks to join the letter. We encourage signatures from businesses, other nonprofits and any organization that supports the Power of Associations. Federal, state and as many local policymakers as practicable will receive the letter.

Please email publicpolicy@asaecenter.org if you have questions or if your organization wishes to submit customized data and anecdotes to share with specific policymakers. Thank you for your service to our association community.

Sincerely,



Mary Kate Cunningham, CAE
Senior Vice President, Public Policy, ASAE

[Date]

[The Honorable [Policymaker Name]]

[Level of Government]

[Address]

[City, State, Zip]



RE: The Power of Associations Supports Policymaking and Champions Each Industry, Profession and Worker. Please Utilize Associations and Their Staff as Resources to Inform and Assist Your Critical Policymaking Efforts.

Dear [Policymaker Name]:

The association community supports every facet of America's economy and society. Trade and professional associations exemplify ***The Power of Associations*** every day as they pursue essential missions in public service that champion every industry, every profession and every worker through specialized education and training, research, technical guidance, best-practices, standard-setting, advocacy, diversity, equity and inclusion. All of which bolster jobs and cultivate robust economic activity for municipalities, states and the federal government.

Associations began prior to America's inception¹. The association community established The Power of Associations program to broaden and solidify awareness of associations' beneficial purpose and impact.

The undersigned associations, businesses and nonprofits—employers—write to share The Power of Associations with each policymaker in America and to demonstrate its deep-rooted and wide-ranging benefits to our nation.

More than 60,000 associations² exist nationally and pay at least \$18 billion each year in wages³. (These figures account solely for associations as employers, and not their economy-boosting stewardship on behalf of members, such as companies and professionals.)

Associations Help Create and Protect Jobs

The association community employs at least 205,000 people⁴. These professionals' collective efforts directly or indirectly support every employer, employee and job function in the economy. Each association exists to advance a stakeholder community, and at least one association exists within each job sector.

Associations are considered tax-exempt but still contribute to governmental revenue through federal payroll taxes, state and local unemployment taxes, real estate taxes, personal property taxes, sales and use taxes, franchise taxes, taxes on unrelated business income and taxes on lobbying activities.

Associations Educate, Train and Certify the Workforce

Associations lift our economy through education, training and professional certification. The latter is especially vital to strengthen industry excellence, create professional pathways, increase workers' earning power, foster marketplace competition and supply consumers with the best products, services and expertise.

Associations are America's leading certification providers, and, as a community, constitute the largest source of post-college education and skills training⁵. Data also show that certification builds equity and reduces gender and racial wage gaps by as much as 43 percent⁶.

¹ [Carpenters' Company of the City and County of Philadelphia](#). Founded 1724.

² U.S. Census Bureau. IRS Data Book. North American Industry Classification System. 2020.

³ U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, Annual Averages. 2020.

⁴ U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, Annual Averages. 2020.

⁵ U.S. Census Bureau. IRS Data Book. North American Industry Classification System. 2018.

⁶ [University of Chicago Human Capital and Economic Opportunity Global Working Group](#). 2017.

Associations Conduct Events that Produce Significant Economic Activity

Major events, such as conferences, conventions and trade shows, fuel the hospitality sector and help provide associations the means to pay staff, promote stakeholders, lead communities, administer technical education and invest in essential tools and resources.

The following data demonstrate a small portion of events' broad economic impact:

- The events industry generates \$330 billion each year in the U.S.⁷
- At least one-fifth of associations conduct 50 or more revenue-generating events each year⁸.
- Associations dedicate 35 percent of their budgets to conducting events, on average⁹.
- The hospitality sector employs almost 16 million workers¹⁰.
- Individual association events contribute tens—often hundreds—of millions of dollars to state and local economies. (*The American Society of Association Executives (ASAE) four-day Annual Meeting hosts 5,000 professionals and injects \$16 million into local economies, on average; ASAE's 2018 Annual Meeting in Chicago, IL delivered \$150 million in downstream economic activity nine months after the event*¹¹.)

Associations Set Product, Service and Safety Standards

Product, service and safety standards protect and empower consumers, and associations establish critical standards for everything from children's toys to building construction—from mattresses we sleep on to food we eat. Standard-setting in the U.S. is a process historically driven by the private sector, with the government in a supporting and guiding role.

Associations Provide Essential Technical and Subject-Matter Expertise

Associations help ensure their industries and professions carry a collective voice and that all stakeholders understand the complex issues and dynamic communities with which they interact. Associations are repositories of industry- and profession-specific expertise and serve as a resource to anyone who wishes to build knowledge.

Associations Promote Diversity, Equity and Inclusion

People, companies and other employers join associations because they want to work together toward a common cause and achieve mission excellence, which is possible only through prioritizing strong diversity, equity and inclusion amid and atop the workforce. Associations confront inequities in hiring, advancement, compensation and organizational culture as part of a community-wide endeavor toward excellence¹².

Our community stands ready to share The Power of Associations with your team and provide support as you consider important public policies. Associations and their dedicated teams champion every American industry, profession and worker—The Power of Associations champions America.

Thank you for your service to our country and for taking time to read about The Power of Associations. If you wish to learn more, we encourage you to visit The Power of Associations [website](#) and connect with associations near you. Please [email](#) ASAE with questions.

Sincerely,

The Association Community and Allied Organizations

(Signatory list begins on page 3.)

⁷ Events Industry Council. Global Economic Significance of Business Events. November 2018.

⁸ ASAE Research Foundation Financial Impact Study. December 2020.

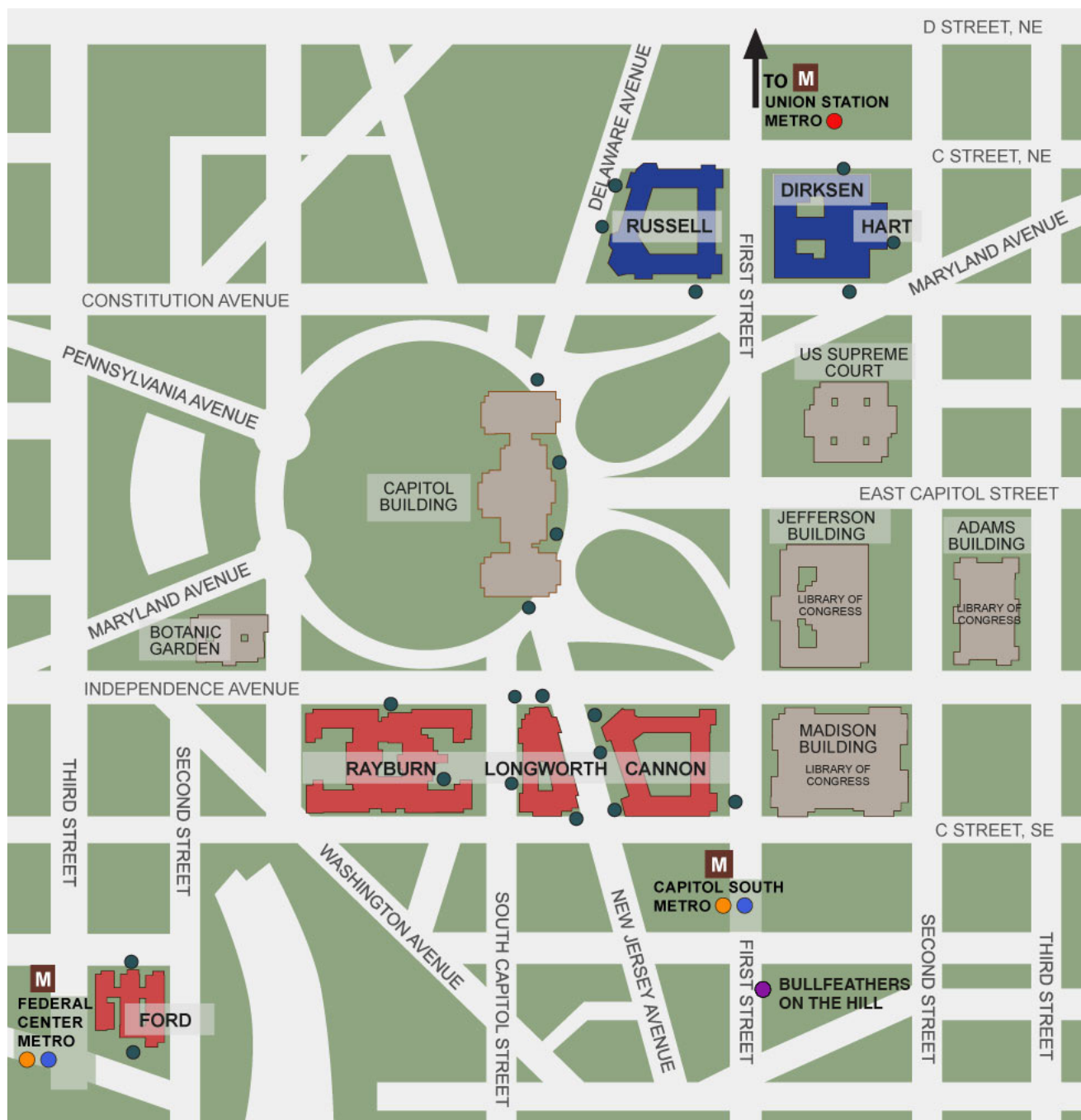
⁹ Professional Convention Management Association. 28th Annual Meetings Markey Survey. 2019.

¹⁰ U.S. Bureau of Labor Statistics. Leisure and Hospitality Reporting. 2022.

¹¹ Choose Chicago (Chicago, Illinois Convention & Visitors Bureau) Economic Reporting. 2019.


¹² [ASAE Announces Diversity Executive Leadership Program Class of 2022.](#)

Map of Capitol Hill



 **House office building** (Rayburn, Longworth, Cannon, Ford)

 **Senate office building** (Russell, Dirksen, Hart)

 **Building entrances**

 **Metro station**

 Red line  Blue line  Orange line

 **Bullfeathers on the Hill**
410 First Street SE

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