

Day 2!



 **NLAE 2026**
CHICAGO
ANNUAL CONFERENCE

Wi-Fi:

Network name- Sonesta_Conference

Password- Sonesta2026!



Thank You To Our Conference Sponsors:



2026 Annual Membership Meeting

Membership Meeting Agenda

- i. Call to Order & Welcome
 - Confirm Quorum
 - Approval of 2025 Membership Meeting Minutes
- ii. 2025 Year-End Review and 2026 YTD Financial Report
- iii. 2026 Membership Report
- iv. Strategic Plan Update
- v. Presentation of 2026-2027 Slate of Officers
- vi. Announce 2027 Conference Location & Dates
- vii. Adjourn

2025 Financials

NLAE Statements of Financial Position As of December 31, 2025

	12/31/2025	12/31/2024
Assets		
Current Assets		
Checking	52,338	43,042
Investments	215,965	183,324
Prepaid Expenses	6,402	7,672
Total Current Assets	274,706	234,038
Total Assets	274,706	234,038
Liabilities & Net Assets		
Current Liabilities		
Accounts Payable and Accrued Expenses	1,000	-
Deferred Membership Dues	9,400	11,225
Deferred Registration Revenue	950	-
Total Current Liabilities	11,350	11,225
Net Assets		
Unrestricted Net Assets	263,356	222,813
Total Liabilities & Net Assets	274,706	234,038

NLAE Statements of Activities As of December 31, 2025

	Actual 2025	Budget 2025	Variance F / (U)	Actual 2025	Actual 2024	Variance F / (U)
Annual Meeting						
Registration	17,900	20,025	(2,125)	17,900	17,400	500
Sponsorship	20,000	15,000	5,000	20,000	15,000	5,000
Annual Meeting Revenue	37,900	35,025	2,875	37,900	32,400	5,500
Annual Meeting Expenses						
Speaker Costs	(3,275)	(5,000)	1,725	(3,275)	(5,000)	1,725
A/V	(4,480)	(3,000)	(1,480)	(4,480)	(877)	(3,602)
Food & Beverage	(8,128)	(10,000)	1,872	(8,128)	(7,557)	(571)
Meeting Space	(4,240)	(5,000)	760	(4,240)	(1,536)	(2,705)
Travel	(1,521)	(1,700)	179	(1,521)	(3,010)	1,489
Printing	(1,009)	(500)	(509)	(1,009)	(236)	(773)
Promotional Products	(1,398)	(1,000)	(398)	(1,398)	(2,174)	775
Offsite Event	(5,005)	(6,110)	1,105	(5,005)	(4,470)	(535)
Annual Meeting Expenses	(29,056)	(32,310)	3,254	(29,056)	(24,859)	(4,197)
Net Annual Meeting Revenue	8,844	2,715	6,129	8,844	7,541	1,303
Membership Dues	16,725	16,075	650	16,725	16,075	650
Membership Expenses	(150)	-	(150)	(150)	-	(150)
Total Net Revenue	25,419	18,790	6,629	25,419	23,616	1,803
Operating Expenses						
Management Fee	13,500	13,500	-	13,500	13,500	-
Printing	251	300	49	251	251	0
Governance	-	1,000	1,000	-	658	658
Business Insurance	1,368	1,350	(18)	1,368	1,322	(46)
Credit Card/Bank Fees	1,198	1,000	(198)	1,198	1,081	(117)
Professional Services	1,150	1,200	50	1,150	1,100	(50)
Software Expense	51	-	(51)	51	-	(51)
Miscellaneous Expense	-	-	-	-	-	-
Total Operating Expenses	17,517	18,350	833	17,517	17,913	395
Operating Income (Loss)	7,901	440	7,461	7,901	5,703	2,198
Investment Income	19,621	4,000	15,621	19,621	13,740	5,882
Unrealized Gain (Loss) on Invest	13,020	-	13,020	13,020	15,315	(2,295)
Excess Income over Expenses	40,543	4,440	36,103	40,543	34,758	5,785

2026 YTD Financials

NLAE Statements of Financial Position As of March 31, 2026

	3/31/2026	12/31/2025
Assets		
Current Assets		
Checking	78,102	52,338
Investments	209,269	215,965
Prepaid Expenses	12,449	6,402
Total Current Assets	299,820	274,706
Total Assets	299,820	274,706
Liabilities & Net Assets		
Current Liabilities		
Accounts Payable and Accrued Expenses	1,000	1,000
Deferred Membership Dues	13,331	9,400
Deferred Registration Revenue	13,750	950
Deferred Sponsorship Revenue	15,000	-
Total Current Liabilities	43,081	11,350
Net Assets		
Unrestricted Net Assets	256,739	263,356
Total Liabilities & Net Assets	299,820	274,706

NLAE Statements of Activities As of March 31, 2026

	Projection 2026	Budget 2026	Variance F / (U)	Projection 2026	Actual 2025	Variance F / (U)
Annual Meeting						
Registration	13,750	22,500	(8,750)	13,750	17,900	(4,150)
Sponsorship	19,500	20,000	(500)	19,500	20,000	(500)
Annual Meeting Revenue	33,250	42,500	(9,250)	33,250	37,900	(4,650)
Annual Meeting Expenses						
Speaker Costs	(5,000)	(5,000)	-	(5,000)	(3,275)	(1,725)
A/V	(9,000)	(10,000)	1,000	(9,000)	(4,480)	(4,520)
Food & Beverage	(24,500)	(21,700)	(2,800)	(24,500)	(8,128)	(16,372)
Meeting Space	-	-	-	-	(4,240)	4,240
Travel	(1,300)	(1,300)	-	(1,300)	(1,521)	221
Printing	(100)	(1,000)	900	(100)	(1,009)	909
Promotional Products	-	-	-	-	(1,398)	1,398
Offsite Event	(9,000)	(7,150)	(1,850)	(9,000)	(5,005)	(3,995)
Annual Meeting Expenses	(48,900)	(46,150)	(2,750)	(48,900)	(29,056)	(19,844)
Net Annual Meeting Revenue	(15,650)	(3,650)	(12,000)	(15,650)	8,844	(24,494)
Membership Dues	17,775	16,275	1,500	17,775	16,725	1,050
Membership Expenses	-	-	-	-	(150)	150
Total Net Revenue	2,125	12,625	(10,500)	2,125	25,419	(23,294)
Operating Expenses						
Management Fee	13,500	13,500	-	13,500	13,500	-
Printing	300	300	-	300	251	(49)
Governance	-	-	-	-	-	-
Business Insurance	1,400	1,400	-	1,400	1,368	(32)
Credit Card/Bank Fees	1,100	1,100	-	1,100	1,198	98
Professional Services	1,250	1,250	-	1,250	1,150	(100)
Software Expense	-	-	-	-	51	51
Miscellaneous Expense	-	-	-	-	-	-
Total Operating Expenses	17,550	17,550	-	17,550	17,517	(33)
Operating Income (Loss)	(15,425)	(4,925)	(10,500)	(15,425)	7,901	(23,326)
Investment Income	6,000	6,000	-	6,000	19,621	(13,621)
Unrealized Gain (Loss) on Invest	-	-	-	-	13,020	(13,020)
Excess Income over Expenses	(9,425)	1,075	(10,500)	(9,425)	40,543	(49,968)

2026 Membership Report



Membership Report

As of April 9, 2026

	2018	2019	2020	2021	2022	2023	2024	2025	2026
Number of Members	64	62	61	63	65	70	82	94	91
Number of Associations	44	45	45	43	42	45	45	49	53
Number of New Members	11	5	3	6	10	2	18	9	13
Number of Cancelled Memberships	-	6	11	7	2	1	6	3	10
Number of Honorary Members	-	-	-	15	14	17	17	17	17

New Associations:

- IPPS-SR
- National Greenhouse Manufacturers Association

Strategic Planning

Elements	Current	Proposed New/Revision
Mission Statement	To be the leading resource for green industry association professionals.	To serve as the trusted and collaborative community for nursery and landscape association executives, providing knowledge, leadership development, and shared solutions that strengthen the green industry.
Vision Statement	N/A	A trusted, collaborative network where association executives learn, share, and lead the green industry together.
“What We Do”	The purpose of this organization is to foster the cooperative effort of its members in problem solving; the development and improvement of services to its members and their respective associations; the dissemination of information to its members; and educational enlightenment relative to association management. NLAE is dedicated to the development of its members, providing information and opportunities for growth on important topics, including the following: • Personal leadership development • Legislative issues specific to the green industry • Staff development and working with volunteers • Association financial strategies • Event and trade show development and management • Engaging future generations • General association management including membership development	We are a peer-to-peer community that connects members to share knowledge, learn from collective experience, solve problems, and support one another in becoming better leaders. Together, we identify opportunities, trends, and challenges to advance the green industry.

NLAE 2026-27 Slate of Officers

- **President** – Scott Grams, Landscape Illinois
- **President- Elect** – Amy Upton, Michigan Nursery & Landscape Association
- **Vice President** – Heather MacRae, Landscape Ontario Horticultural Trades Association
- **Immediate Past President** – Breanne Chavez, Washington State Nursery & Landscape Association
- **Director** – Russell Wood, Alabama Nursery & Landscape Association
- **Director** – Sandra Giarde, California Landscape Contractors Association
- **Director** – Joel Beatson, Landscape Alberta



The 2027 NLAE Conference...

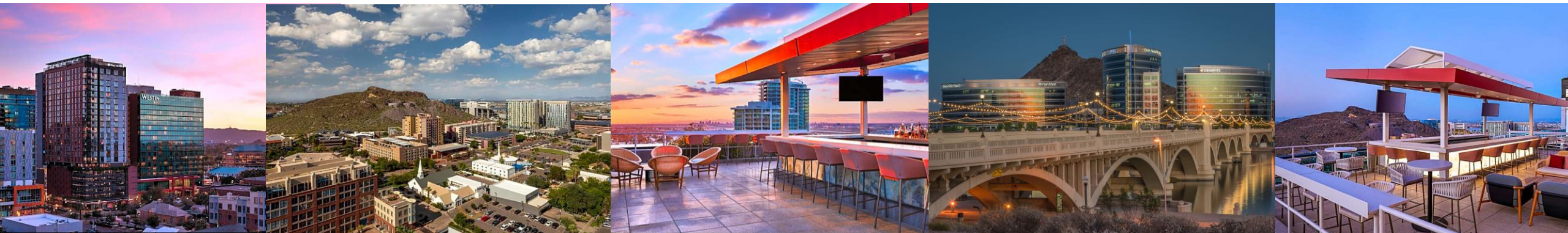


We are going to a city...

- Once known as a ferry crossing...
- Built on agriculture and a historic mill...
- Where even the landmarks rose from the ashes...
- A lake was created where none existed before...
- With roots going back 1,000+ years...
- Home to one of the nation's largest universities...



 NLAE **ANNUAL CONFERENCE**
TEMPE, AZ | MAY 3-5, 2027





NLAE 2026
CHICAGO
ANNUAL CONFERENCE

NLAE

Lessons from Sage

Mary Beth Cowardin, NLAE/AmericanHort



Bringing Sage to Life

Getting Started

- Selecting a Vendor
- Name & Branding

Strategy & Training

- Training on Content
- Testing / Feedback
- LAUNCH

Post Launch

- Ongoing Marketing & Promotion
- Monitoring Performance
- Continued Training & Development
- Develop Usage Tools



Where We Started & Why An AI Tool?



Hi, I'm ivy.



Meet 'Tulip.



Meet 'Tulip.



Meet R^{oots}ty.



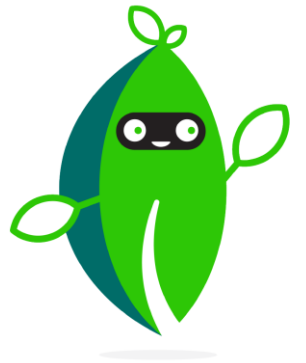
Hi, I'm aster.

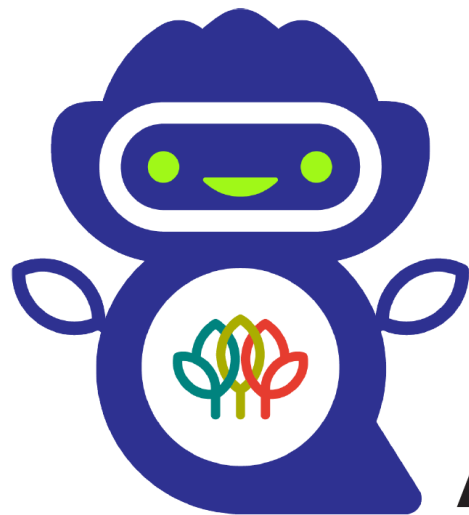


meet sage.



Sprout, here.





AmericanHort
Leaflet

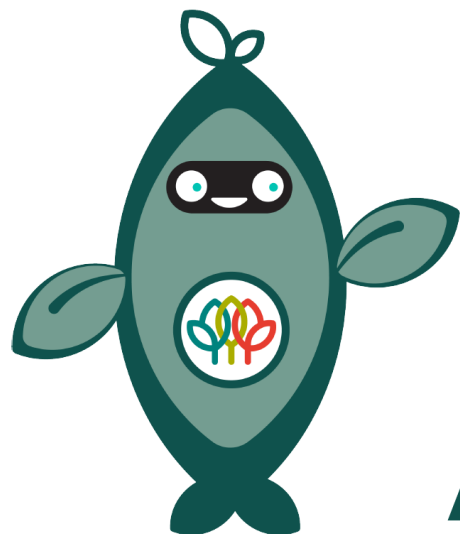


+

Chat Bubble



Ask Sage



Ask Sage

Sage



Google Font

Poppins Bold

Poppins Medium

Poppins Regular

Colors



PANTONE 267 C
Hex #60269E
RGB 96, 38, 158
HSB 269, 76%, 62%
CMYK 77, 97, 0, 0
Ink Type Spot



PANTONE 383 C
Hex #A8AD00
RGB 168, 173, 0
HSB 62, 100%, 68%
CMYK 40, 20, 100, 1
Ink Type Spot

Sage Marketing Overview

Digital Marketing

- Tutorial Video
- Landing page
AmericanHort.org/Sage
- Email
- Newsletter Promotion
- Website Banner
- Social Media
- Cultivate Demo

Print Marketing

- May Connect Article
- Press Release
- Connect Ads
- Flyer
- Cultivate Signs
- Cardboard Cut-out
- Stressballs
- Round Button Pins





Hello, I'm Sage.

I am the new AI-powered AmericanHort assistant, here to provide you with answers to your most important questions about membership, daily tasks, and more. Check back frequently, as my knowledge will continue to grow.

To begin your chat, simply type your question:



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet?



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam. Quis nostrud exerci tation ullamcorper susinvolputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et.





Hello, I'm Sage

The NEW AI Assistant

Ask Me Questions About

-  Business guidance
-  Educational opportunities
-  Event details
-  Membership benefits
-  Top issues facing our industry
-  Industry research

... and more.

AmericanHort.org/Sage

Admin Dashboard

betty insights

Selected Organization: American Hort

Selected Instance: Default

New Instance

Dashboard

Profile

Content

Reports

Resources

User Statistics

American Hort

5/1/2025 - 4/24/2026

All Instances

Print Report

Ask Betty what your users are saying!

TOTAL USERS

733

TOTAL CONVERSATIONS

1917

Avg. MESSAGES / CONVERSATION

3.4

CONTENT COVERAGE

75%

Conversations Over Time

Most Popular Content

Common Topics

User Return Rate Analysis

Common Questions

Query

Can you help me create a job posting

Guide me through how I can get the most of my Cultivate experience

Can you tell me what other activities are available at Cultivate, beyond the trade show and education sessions

How can I utilize the Cultivate app, Map Your Show, to plan my visit

Tell me about the Spanish education at Cultivate

Count

26

13

11

11

10

Feedback Items

TYPE: All (171)

Positive (155)

Negative (16)

By New User (156)

All (171)

Unlabeled

Unlabeled

Showing 138 of 171 items

Type	Feedback	Date
+	Thanks for your help, Sage. You have the same name as the AI assistant for Whole Foods Corp. HR.	Apr 18, 2025
+	I'm on the dashboard and should be able to use this function. Also, the Bot should not be providing me with my own contact information. It instead should be providing me the information needed since I am logged into the Bettybot insights portal.	Apr 17, 2025
+	We'd like to make sure that the second to last part is not included in a response from Sage about this program. This program is geared towards growers, but other industry segments can also benefit from some. We need to identify the best way to train Sage. More updates are coming to this program, so will wait to train further. Thank you.	Mar 26, 2025
+	Again, this staff issue is not reflective of the main website updates. Do I need to push the information to all instances? Can we discuss at next call?	Mar 18, 2025
+	When I ask this question on the user experience side, but answers appropriately. The Plug & Cutting Conference is a young plant grower focused educational event designed to help greenhouse and nursery growers strengthen propagation and young plant production skills through practical, peer-driven learning and industry connection. What the event includes Educational sessions featuring peer-led discussions and grower-led panels with a real world, production first focus Trade show intentionally placed to be more intimate than large expos, giving attendees direct access to vendors and solutions followed to young plant growers Experiential greenhouse production tours (available for an additional fee) that provide behind-the-scenes looks at operations and hands-on learning opportunities Key topics covered Education is organized around core young plant production needs, including Best Management Practices (e.g., mist irrigation techniques, troubleshooting propagation issues, evaluating profitability of propagation methods, alternative opportunities) Pests & Diseases (practical PPM strategies, fungicide use, bio pest control, diagnostic techniques, value of botanicals, control protocols) Production Insights (nutrient management, light optimization under controlled environments, establishing plug filters, tissue culture propagation lab, root development best practices) Dates, location, and pricing (2025) September 14-16, 2025 Philadelphia, PA Registration opens in April Registration pricing: Member \$545 Premium Member \$645 Non-member \$845 (Fee includes access to in-person and on-demand education, the trade show, and the networking reception.) Greenhouse production tours (optional add-on) \$195 (includes transportation and lunch) Exhibiting and sponsorship opportunities, with booth sales opening mid-March. Booths include an F10' space with basic furnishings, a booth ID sign, two complimentary session passes, and an electronic list of eligible attendees leads after the event. Speaker proposals Speaker proposals are being requested (sessions can be in English or Spanish) with a deadline of December 31, 2025. If you tell me what best describes your role (plug/liner producer, finished grower, nursery, supplier, etc.) and your top priority (propagation quality, labor automation, PPM, inputs, tours, vendor sourcing), I can point you to the most relevant parts of the program to focus on. Helpful Links: Upcoming Events and Webinars Learn More User I am a finished grower Assistant however, this is the staff instance, and I should be able to obtain the same response. Can we fix that? Thank!	Mar 18, 2025

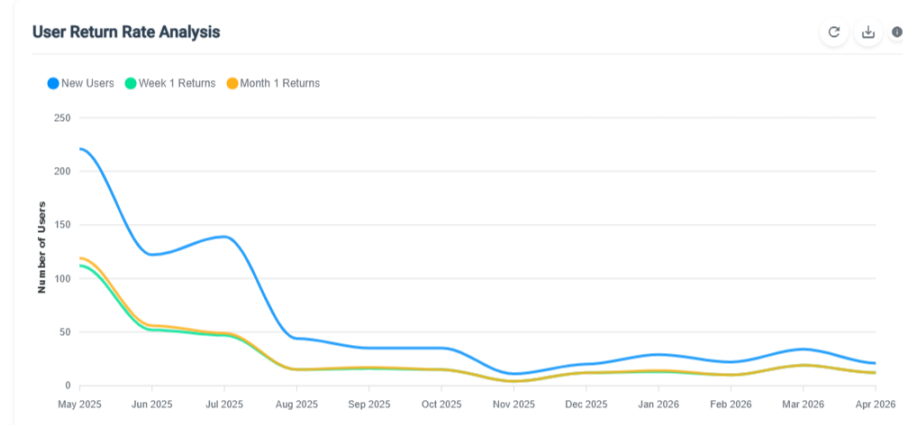
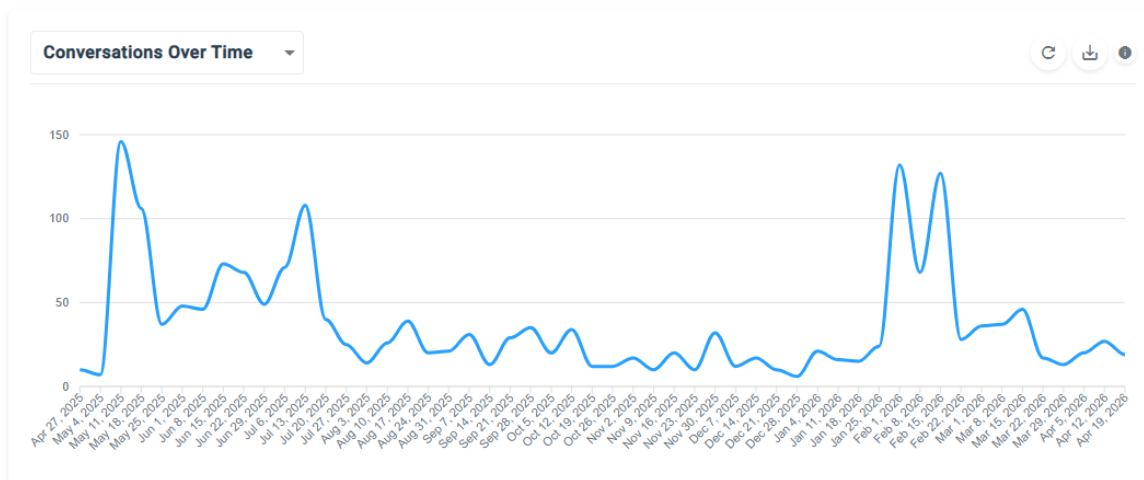
Items per page: 5

1 - 5 of 138

Need help? Ask Betty!

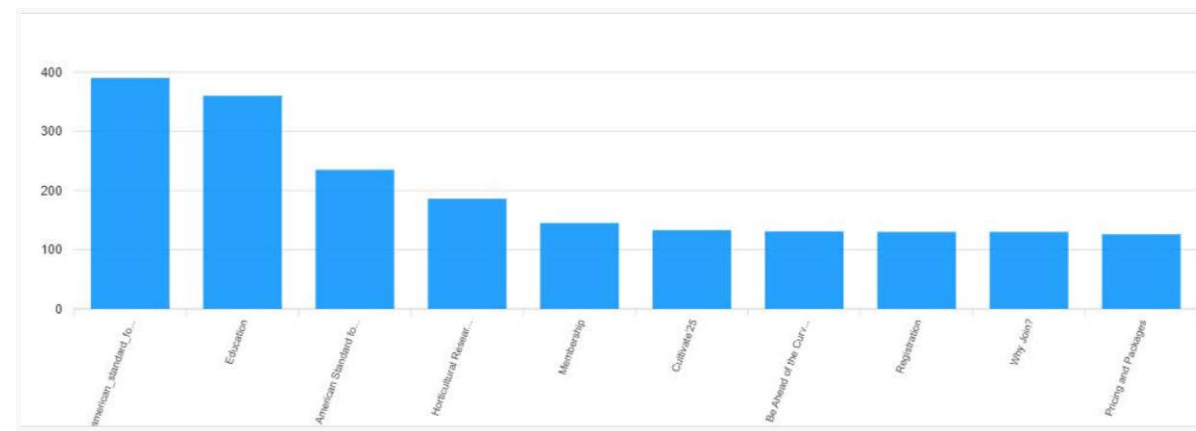
Contact us with feedback, issues, or questions [HERE](#)

Performance to Date



Since launch:

- **733** Total Users
- **1917** Total Conversations
- **3.4** – average messages per conversation
- Most Popular Content:
 - Nursery Stock Standards
 - Education
 - HRI
 - Membership
 - Cultivate'25
 - Benchmarking Surveys
 - Registration
 - Why Join?
 - Pricing and Packages



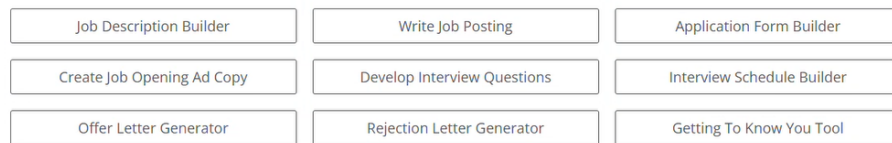
Prompt Library



Utilize Sage to help you save time on important tasks such as developing hiring materials, onboarding, marketing and more.

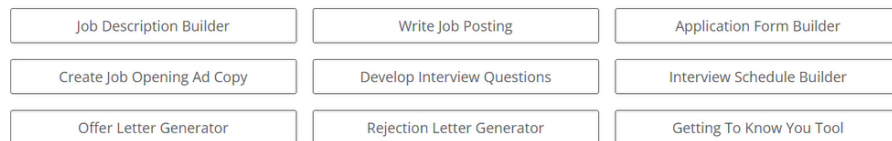
Simply click the task you need help with and have Sage generate you a product that you can review, use, or customize further.

Quick Start - Most Used Tools



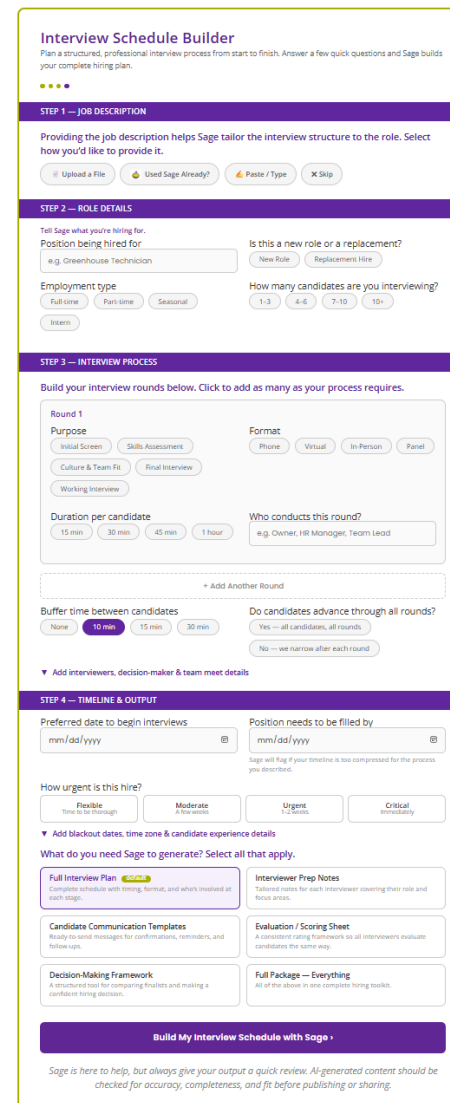
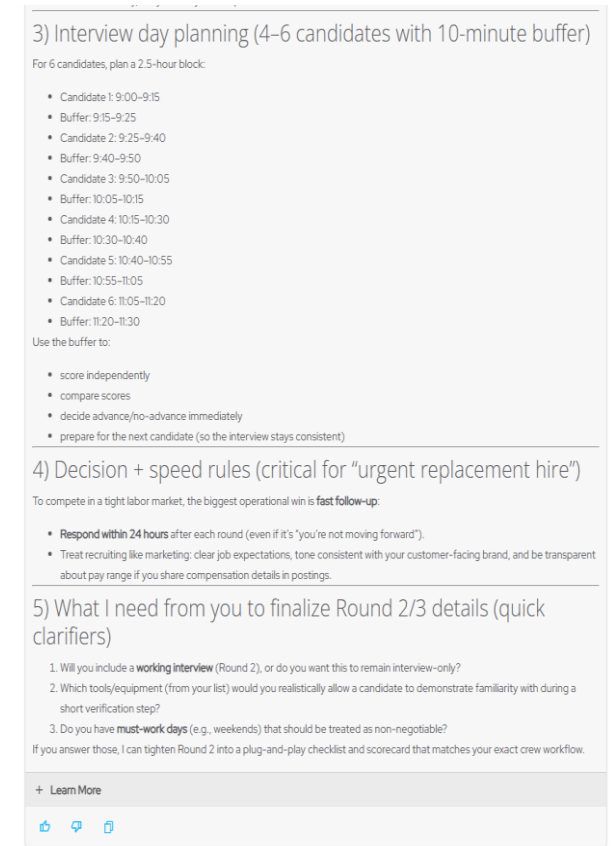
Hiring Tasks

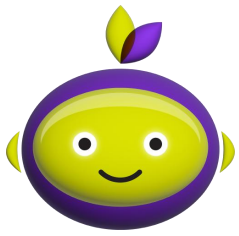
Use these forms to have Sage help you quickly and efficiently tackle important hiring and onboarding tasks.



New Hire Onboarding

Use these forms to have Sage help you quickly and efficiently tackle important hiring and onboarding tasks.

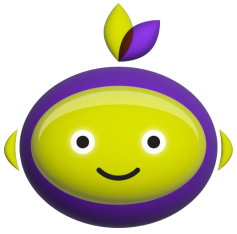
The screenshot shows the 'Interview Schedule Builder' form. It is divided into four steps: 1. Job Description, 2. Role Details, 3. Interview Process, and 4. Timeline & Output. Step 1 includes fields for job description and hiring plan. Step 2 includes fields for role details and employment type. Step 3 includes fields for interview process and duration. Step 4 includes fields for timeline and output. The form is currently in Step 3, showing 'Round 1' details and a 'Duration per candidate' dropdown.The screenshot shows the output of the 'Interview Schedule Builder' form. It displays the 'Interview day planning' section, which includes a list of candidates and their interview times. The output is organized into sections: 3) Interview day planning (4-6 candidates with 10-minute buffer), 4) Decision + speed rules (critical for "urgent replacement hire"), and 5) What I need from you to finalize Round 2/3 details (quick clarifiers). The output is presented in a clean, professional format with a purple header and footer.



Getting Started Lessons

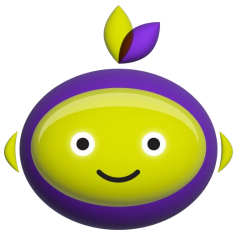
- Don't believe your sales guy
- Negotiate cost
- Set up is relatively simple, but styling takes more effort
- Talking to references and looking at what other associations are doing is helpful
- To trademark or not to trademark?
- Even your AI tool needs AI





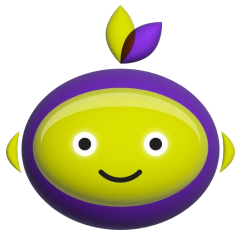
Strategy & Training Lessons

- You need a strategy – what is your main objective?
- You can have multiple uses – Internal/External
- You can limit the number of questions one can ask
- Training is key, and having an RSS feed or API will be important
- Presence on your website needs to be STRONG
- Providing feedback to your bot is critical
- Setting up with an RSS feed and API makes ongoing training easiest
- Connecting to your AMS is helpful
 - Member/non-member experiences work if logged in – is it driving membership?
- Sage automatically read...
 - PDF files
 - Links to other sites (without API)
 - Your LMS content, videos, etc.
- Sage isn't good with dates/timing



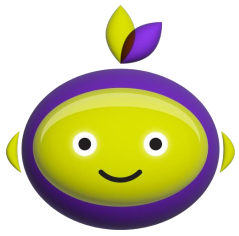
Post Launch Lessons

- Ongoing marketing & promotion is important to driving adoption
- Needs to become part of your organization's thinking
- Bettybot team is an excellent resource – and persistent in wanting feedback and testimonials
- Setting up forms/Prompt Library – important and takes time
 - Being specific with prompts/forms yields best results
- Future Opportunities are Endless
- Be creative with your prompt Library and get input from members
- Evaluation of performance and factoring in ROE are important



Post Launch Lessons Continued...

- Having a dedicated staff person is important, need all staff to embrace adoption and drive use with members
- Have an AI policy and enforce it with your team
- Need Claude or ChatGPT to create forms
- Sage is multi-lingual
- Those who use it like it
- An app version might be helpful



Common Questions & Objections

- How is this different from ChatGPT?
- Sustainability concerns – impacting water availability
- Security – who sees my information?
- But I've already trained Chat/Co-Pilot/Gemini/Claude
- Concern over how it will impact one's job

How Sage is Different from ChatGPT



Feature	Sage (AmericanHort)	ChatGPT (public)
Purpose	Organization-specific, accurate, aligned with official voice	General, expressive, broad topics
Customization	Fully configurable, tailored for internal/external use	Limited customization, public tool
Data Sources	Only AmericanHort-approved materials	Open internet data
Security & Reliability	High privacy, brand consistency	Variable accuracy, less control

Association Adoption of AI Has Room for Growth

Most associations **are exploring AI**, but only a minority have **fully implemented** AI systems.

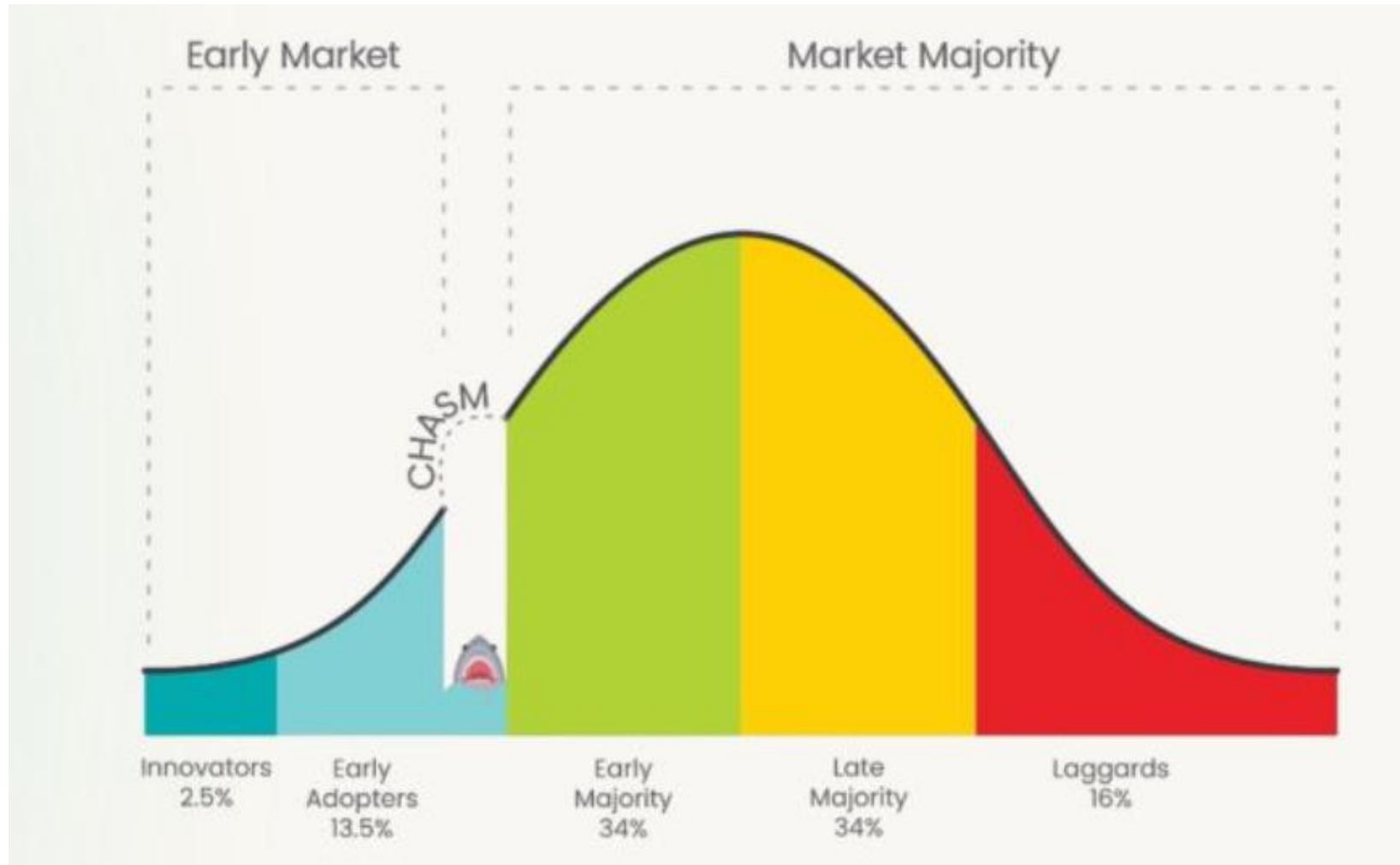
Source / Organization	Year	Sample Size	Key Findings on AI Adoption
Avenue M Group – Association Executive Study	2023	~800+ association executives	58% increased their use of AI in 2023; 23% do not use AI; 19% unchanged.
ASAE – Association Insights Center (AIC)	2023	~500 association leaders	Fewer than 25% have active AI initiatives (“underway”); majority are in “early exploration.”
ASAE – Association Insights Center (AIC)	2023	~500 association leaders	Fewer than 25% have active AI initiatives (“underway”); majority are in “early exploration.”
FSAE – AI in Associations Report	2023	393 association professionals	Only 13% have a formal AI policy; Top uses: marketing (75%), personalized communications (54%), content development (37%).
Sidecar + Association Analytics Report: “State of AI in Associations”	2024	~1,000 association professionals	41% are experimenting with AI; 31% planning; 28% not using. Only 4% classify their organization as a “high adopter.”
Community Brands Digital Evolution Report	2024	700+ association and nonprofit professionals	52% say AI will be “important or very important” to future operations, but only 18% currently use AI tools regularly.

Implications:

- “Experimentation” is widespread. (40%–60%)
- **Active adoption** (structured, strategic, governed use) is still low (<25%).
- Formal governance (AI policies, standards, training) is **very rare** (~10–15%).
- Marketing and communications are consistently the **top use cases**, followed by member service automation and content creation.

There is an estimated 60,000 – 126,000 association organizations in the U.S.

Associations Have an Opportunity to Cross the Chasm



Sources: Altman, Thomas, BettyBot.ai, [“The Chasm Moment for AI in Associations”](#)

Association AI Bot Use Examples

Million Dollar Round Table - MDRT	Assoc. to Advance Collegiate Schools of Business (AACSB)	Restaurant Owner.Com	Missouri State Teachers' Assn	American Paint Horse Assn.
 • 150+ languages • Membership Info • MDRT meeting information, podcasts, etc. • Provides advice on advising clients based on MDRT information • Summarizes responses and reports	 • A hub for accreditation • Provide prompts for: ◦ Strategic Planning ◦ Learner Progression Plan ◦ Curriculum ◦ Teaching Effectiveness	 • Training materials • Guide to resources • Pre-shift meeting agenda • Build catering partnerships with local businesses • Respond to mixed reviews	 • Lesson plans • Student articles • Group Work worksheet • Multiple explanation questions	 • How to transfer horse ownership • How to apply for amateur card • When are APHA shows? • What are the color requirements for regular register status
MDRT - MDRT Dashboard	AI Use Cases for Accreditation	Ask RObi RestaurantOwner	Prompt Library	American Paint Horse Association: A Rich Legacy - APHA: American Paint Horse Association



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How to Slay Your Email & Organize the Gaggle Information

Sandra Giarde, CLCA

SLAYING THE
EMAIL
DRAGON



MANAGE WHAT COMES TO YOU

Unsubscribe

Daily
Digests



○ MyCalSAE <noreply@mycalsae.org>

To: ⓧ Sandra Giarde, CAE

MyCalSAE Updates

Post New Discussion

Thursday Nov 7, 2024

CEO/Executive Director: Board Orientation

Rose Epperson, President at Epicenter Management

CEO/Executive Director: Selection of Facilitator/Coach

Terry Gage, President at CA Agricultural Aircraft Association

Member Community: Fulfilled! Annual Awards Program Assistance Request

1. Thank you to everyone who reached out to volunteer. I have secured our judge and appreciate all...

Kristen Davies, Vice President of Operations at Multifamily NW

Kristen Davies, Vice President of Operations at Multifamily NW

Capital Region: URGENT! Taco Truck or Sandwich Delivery Needed for Nov 12 2024 Event

2. Hi, Julie. We've used Hannibal's Catering (on 37th Street) to feed our Board members for their...

Julie Trost, Executive Director at Mason Contractors Association of CA, Inc (MCAC)

Rene LaRoche, Executive Director at CA Association of Local Agency Formation Commissions (CALAFCO)

3. Good morning, I too use Hannibal's for local non-profit that does a luncheon every other month,...

Beverly Hoeft, Vice President Community Outreach Officer at Community West Bank

MANAGE WHAT COMES TO YOU



Folders



Searching

- ✂ Inbox
 - 📁 2020 COVID 19
- ✓ 📁 Accounting
 - 📁 Authorize.net
 - 📁 Impexium Batches
 - 📁 Tax Returns
 - 📁 TO PRINT
 - 📁 Umpqua Merger
- > 📁 Awards
- ✓ 📁 Board
 - 📁 Exec Committee
 - 📁 Forms
 - 📁 Cal Employers Assn
- > 📁 Chapters
- ✓ 📁 CLCA Office
 - 📁 Security Patrol

Folders with subfolders = easier to search

MANAGE WHAT COMES TO YOU

Automated Rules



Authorize.net

If the message was received from 'noreply@mail.authorize.net', move the message to folder 'Authorize.net' and stop processing more rules on this message.



Daily Security

If the message was received from 'no-reply@staffr.com', move the message to folder 'Security Patrol' and stop processing more rules on this message.



Received from irrigation.org or

If the sender's address contains these words: 'irrigation.org', move the message to folder 'NLAE' and stop processing more rules on this message.



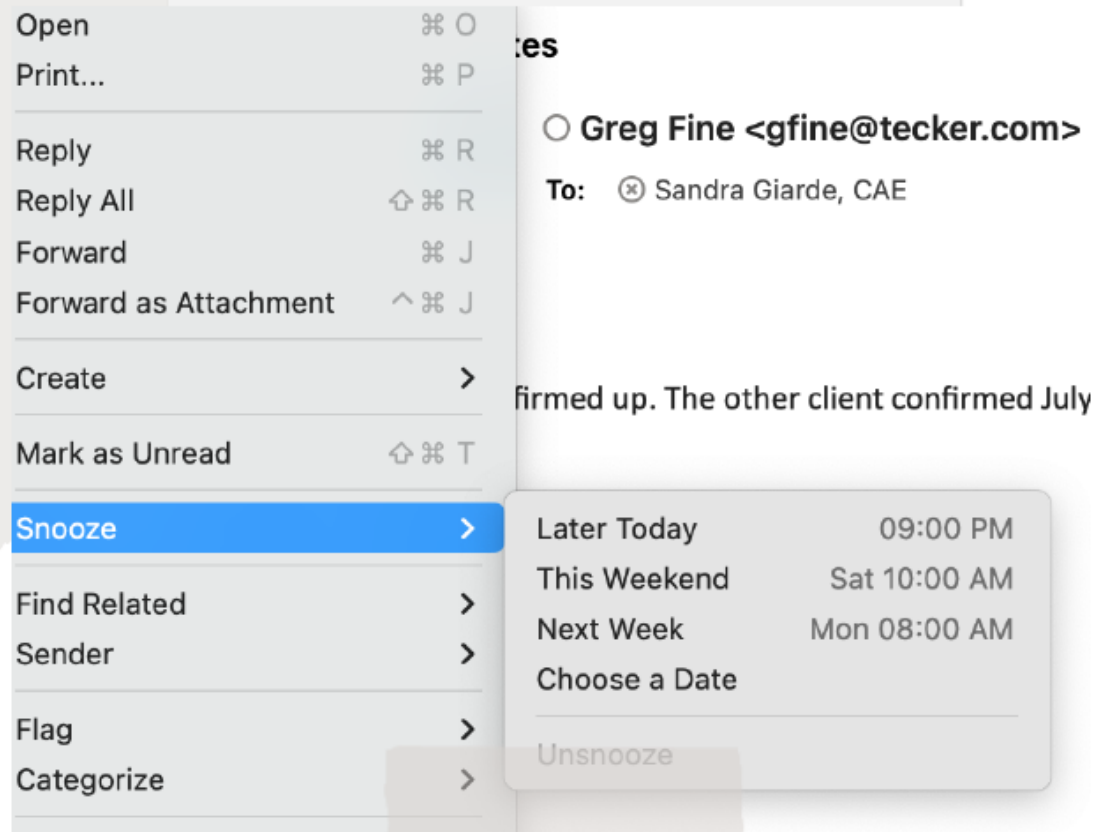
Received from NLAEListServe or

If the message was received from 'NLAEListServe', move the message to folder 'NLAE' and stop processing more rules on this message.



MANAGE WHAT COMES TO YOU

5 Actions for Every Email



- 1. Act on it.** If you have time to act on the email immediately, then do so. But don't feel obliged to act immediately if you have higher priorities.
- 2. Defer it.** Too busy to deal with the email immediately? No problem. Turn it into a task that sits in your task manager or use the email snooze button. You can then deal with it on your own time and view it alongside your other tasks.



MANAGE WHAT COMES TO YOU

5 Actions for Every Email

- 3. File it.** Many emails we receive require no particular action, but merely provide useful information. In such cases, archive it for future reference. Move it out of the inbox.
- 4. Delete it.** If the email is spam or has no long-term value, delete it.
- 5. Delegate it.** Some emails require action, but you might not be the best person to do it. In those cases, delegate by forwarding the email to the relevant person and then file it.

MANAGE WHAT COMES FROM YOU



Set expectations from the jump

MANAGE WHAT COMES FROM YOU



Using CC and BCC & training your team what each means



CC = keeping you in the loop, no reply needed



BCC = keeping you in the loop on the downlow, do not reply

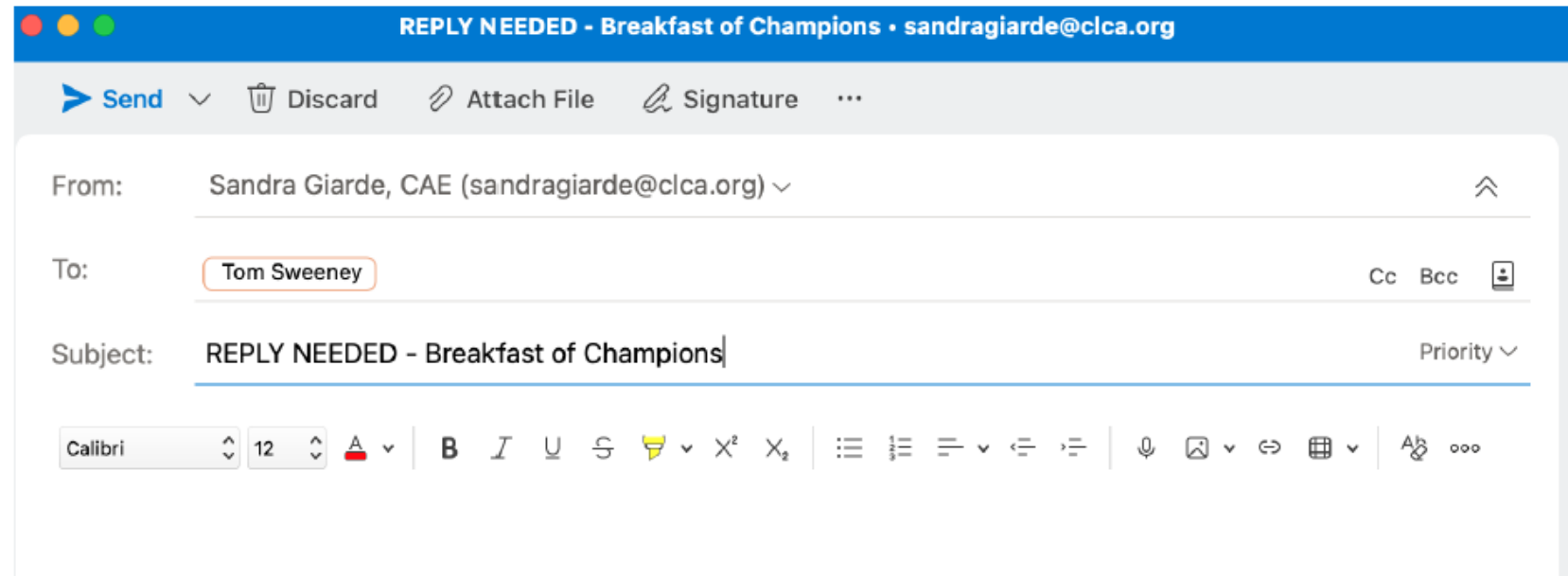
MANAGE WHAT COMES FROM YOU

Subject line formation

FYI

REPLY NEEDED

URGENT



A screenshot of an email composition window. The title bar is blue and contains the text "REPLY NEEDED - Breakfast of Champions • sandragiarde@clca.org". Below the title bar is a toolbar with icons for "Send", "Discard", "Attach File", "Signature", and a menu icon. The email fields are as follows:

- From:** Sandra Giarde, CAE (sandragiarde@clca.org) ✓
- To:** Tom Sweeney (highlighted with a red box) Cc Bcc
- Subject:** REPLY NEEDED - Breakfast of Champions | Priority ✓

At the bottom is a rich text editor toolbar with options for font (Calibri), size (12), color (red), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, outdent, link, unlink, insert table, and a "More" menu (three dots).

MANAGE WHAT COMES FROM YOU

Auto-Replies – 5 Elements to Success

1. You're out
2. Date of expected return
3. "Will read your email when I return"
4. Thank them for their patience
5. Offer alternative pathway, should their need be urgent

*Thanks for your email. I am out of the office at the CLCA Annual Convention. Please excuse any delay in my response.
If your matter is of a more urgent nature, please phone the CLCA office and a staff member can assist you.*



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Advocacy Update

Andrew Bray, NALP

Matt Mika, AmericanHort

Andrew Morris, Irrigation Association



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Key Conference Take-Aways

Gina Albaugh, MNLA

Stephanie Collins, OAN

Nursery & Landscape
Association Executives

2026 CONFERENCE BRACKET



Submit your favorite
conference takeaway



Brackets

Brackets: The Free Social Party Game & Live Voting Bracket Maker

Settle debates, rank favorites, and make any group decision fun with our free tournament bracket generator. It's the ultimate instant play game with no signup required.

[Start](#)[Join](#)[Spectate](#)

The Big Question

e.g., What's the best animal?

[📄 Start Bracket](#)



NLAE ANNUAL CONFERENCE
TEMPE, AZ | MAY 3-5, 2027

See you in May 3-5, 2027 in Tempe, AZ!

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