

{ Executive *Memo*

› Excellence by Association

› SPRING 2008

Show Me the Rule

Ten Legal Trends that Nonprofit Leaders Should Care About

2008 CSAE Conference



VOL. 2, ISSUE 2

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CSAE brings together association leaders to foster professional and personal excellence through unique learning opportunities that inspire members to achieve more and guide associations into the future.

The Promise:

CSAE is committed to delivering high-value programs and services. If a CSAE member is not completely satisfied with any CSAE offering, CSAE will make it right or refund said member's money.

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- All about leadership
- Committed to association excellence
- Future-focused
- Unique learning opportunities
- An effective advocate

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From the President



Lois A. Rice, CAE
President, CSAE
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303.237.5480
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Dear CSAE Colleagues:

A new survey about Colorado associations was recently undertaken by **Greg Williams**, a member of our Public Policy and Professional Development Committees. Thanks to Greg for taking the time to do an informal survey so that we, as well as our elected officials, have a sense of what makes up our association community and what the economic benefits of associations mean to the state. Some of the interesting findings from the survey are:

- The average association budget is \$1.5 million but the range is \$250,000 to \$5 million;
- The average age of the member associations is 49, the oldest being 121 (predating statehood!) and the youngest reported association is 3 years;
- Associations' cumulative direct dollar impact in Colorado is \$220 million annually;
- "Industry regulation" and "employee benefits" are the top two issues associations are concerned about.
- The top three services that CSAE provides which members consider most valuable are the Listserv, the Annual Conference, and CSAE's networking opportunities.

These highlights were presented to members and legislators at our annual legislative reception held on February 28th at the Warwick Hotel. We were pleased to host Representatives Jim Reisberg and Debbie Benefield, among others, who discussed important constituency issues and spoke with our association executives on issues important to their members. Again, big thanks goes to **Scott Meickeljohn**, the Chair of our Public Policy Committee, for making sure that our event was compliant with the provisions of Amendment 41.

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DIA

Show Me The Rule

> BY DAN CAIN

A very close friend of mine has a favorite saying, “Show me the rule,” used most often when someone tells him he can’t do something or must do something. It’s not just a streak of stubbornness, but actually a very important personal principle. His theory is that **people hide behind false beliefs, or avoid doing something they really don’t want to do anyway, by citing a vague rule or a law that prohibits it.**

As I chase around the country talking to boards, I hear things like, “We can’t take a board planning retreat away from our offices because we’re subject to the open meetings law.”

So?! The sunshine laws of most states that I know of don’t prohibit retreats away from the office. Just follow the law – post the agenda, notify the media, allow the public to see and hear what you do, or whatever the law requires. **Learn the law instead of making up your own law!**

“Sarbanes-Oxley says we have to create a board audit committee.”

No it doesn’t! The Sarbanes-Oxley law applies only to publicly-traded corporations and has nothing to do with non-profit corporations.

“We’re a non-profit organization, therefore we can’t be involved in lobbying for political causes that are important to us.”

Wrong! That’s not what the law or the IRS says. Non-profits can’t endorse a candidate, or spend two-thirds of the budget on political activity without incurring the wrath of the IRS, but you can educate legislators about legislation that impacts you or your constituents. **Learn with rules!**

Bottom line: Smart boards act on fact, not on supposition or guessing.

CHECKLIST for a productive board meeting

Control! It’s the first, and maybe the most important, ingredient in pulling off a productive board meeting. I’ve watched boards debate with visitors to their meetings. I’ve seen board chairperson ignore several sidebars going on while a motion is debated. I frequently witness board meetings that completely ignore common parliamentary procedures. They’re out of control!

The very reason boards meet is to deliberate issues and take action, but



all too often the board meeting is all sound and fury, resulting in little or nothing productive. Boards don't want to have unproductive meetings, they just don't spend the time to figure out why they are that way and solve the problem.

Here's a checklist to help you identify a few ways to better control your meetings:

All new board members are trained to:

- **Read and understand budgets and financial statements.** Inability to read, understand, and ask appropriate questions about financial paperwork is the biggest anchor on a board meeting.
- **Understand basic meeting procedures.** For example: We attend all

meetings on time. Only one person speaks at a time. We show respect for each other at all times. We always focus on the mission. We stick to the agenda. We understand all power and authority belongs to the full team, not individuals.

- **Know board policies concerning meetings.** The attendance policy must be enforced. We must have a quorum to do business. The public speaks only during a public forum period.
- **Understand their responsibilities and liabilities.** Is your board required to follow the sunshine law or the public records law? Does each board member understand the duties of care and loyalty? Do all board members

understand they can be held personally liable for their actions?

The executive and president talk strategy before every meeting, and come prepared with:

- **Answers to anticipated questions from board members.** The board chair should know the board well enough to anticipate their need for information about the agenda issues. Invite board members to call the executive or chairperson with questions as soon as they get the agenda before the meeting.
- **Background and support materials on all agenda items.** The board cannot discuss important issues without background and facts. If you're constantly tabling



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issues because of lack of back-ground, there's a clue here.

- **Specific recommendations for the board on all agenda items.**

The executive is paid to provide expertise to the board. Written recommendations on all issues before the board meeting will speed the meeting significantly.

We have the tools for a good meeting, such as:

- **A well-designed agenda and support materials.** The agenda is the road map for the meeting. The map maker can make the trip easy or hard.
- **Ability to deliver board packets and other materials electronically.** Electronic delivery allows you to get materials to board members faster and sooner so they have more time to prepare. A well prepared board will result in a better meeting.
- **Updated board books with policies, minutes of previous meetings, and other necessary materials.** Struggling to remember what we did two meetings ago is a big time eater. A well-organized resource book ready for quick reference saves time.
- **Provide pads and pens.** Yes, every board member should come prepared with basic tools like note pad and pen—but they don't. Place them at every board seat before the meeting or waste time at the meeting chasing down something to write with.

We create a good meeting atmosphere that includes:

- **The chair should read the mission statement as the first item after calling the meeting to order.** There is no better way to focus the purpose of the meeting and keep it on track.
- **Board table, or tables, arranged so the board members can easily see each other, and look like a team.**
- **The chairperson should be positioned at the head of the table in the power position and the executive should sit next to the chairperson.** The end of the table opposite the chairperson should be left open for presentations from non-board members.
- **Name plates should be placed in front of all board members.** Of course they know each other, but nice nameplates give the meeting a businesslike atmosphere.
- **Rules for appropriate behavior.**
 - Meetings will start on time with board members in attendance on time
 - No sidebars
 - Cell phones off or switched to vibrate
 - Discussion only on agenda item
- **Clear motions before any debate.** For example: place small 3 x 5 papers, with a duplicate attached, in front of each board seat. When board members make a motion, they write it on the paper, hand a copy to the secretary and keep a copy.
- **Light refreshments available throughout the meeting.** ■

We create a good meeting atmosphere.

Not a team player? Quit wasting everybody's time!



I would be the first to say that most real progress and change in this world is caused by people who stand apart from the norm—the pusher, the agitator, the person who sees things a little differently than the rest of the world. And that generally hold true for change in nonprofit organizations.

But here's a warning for that person on your board. Want to make changes? That is great! We need people like you. But keep in mind that this is a team. If you don't understand how a team works, you're going to waste everybody's time and accomplish nothing productive.

Here's how it works:

- Change takes a majority vote
- Disrespect your teammates and they'll shut you out so you will never get a majority on your side
- Embarrass your teammates before the public or constituents and they'll resist everything you do
- Fail to listen to your teammates' positions, and they'll never hear a thing you say.

Calendar of EVENTS

11:00 a.m. | New Member Orientation, Spotlight Series, or Networking

11:30 a.m. | Lunch

12:00 noon | Program

1:00 p.m. | Wrap Up

Thursday | May 1, 2008

Friday | June 6, 2008

Thursday | July 10, 2008

Friday | August 8, 2008

Thursday | September 4, 2008

Friday | October 3, 2008

Thursday | November 6, 2008

Friday | December 5, 2008

THANK YOU: { *noun: an expression of gratitude* }

CSAE extends a **THANK YOU** to those who sponsor education and luncheon programs; committee members who work providing requested programming, and to our presenters who volunteer their talents and expertise so we may all learn.

Learn with Leaders Luncheons

January 10, 2008

Warwick Denver Hotel

Cindy Saylor, Sales Manager

Mindy Price, Catering Sales Manager

January 8, 2008

Denver Athletic Club

Judie Davidson-Seidel, Food & Beverage Manager

Julie Germond, Catering Sales Manager

Stephanie Carlson, Catering Sales Manager

March 6, 2008

The Timbers

Diana Burdette-Lincoln, Director of Sales & Marketing

April 4, 2008

Radisson Hotel Denver Stapleton Plaza

Michelle Sedlak, Sales Manager

Critical Knowledge Series

January 16, 2008

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Brittney Delmonico, Sales Coordinator

January 8, 2008

Media Communications for Associations:

Don't be Mad, Be Glad! | Denver Athletic Club

Judie Davidson-Seidel,

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CSAE extends a special thank you to **Doug Slothower**, CSAE Secretary-Treasurer for his volunteer assistance at the CSAE office each month preparing membership invoices, stuffing envelopes, running name badges and preparing for Learn with Leaders Luncheons and Critical Knowledge seminars. We also thank **Judy Robinson**, PhD, CAE, Executive Director, American Society of Bariatric Physicians for her work in developing and conducting the January Leadership Academy. And special thanks for **Rhonda Scurek**, Antlers Hilton Colorado Springs for her creativity and work in preparing January's Luncheon Centerpieces.

Ten Legal Trends that Nonprofit Leaders Should Care About



> BY JEFFREY S. TENENBAUM, ESQ. VENABLE LLP, WASHINGTON, D.C.

As Spring arrives, just as you may be visiting your doctor to get your annual physical, this is a good time to visit your nonprofit organization's legal health and well-being. As always, there are legal trends of which you should be cognizant. Identified below are ten key legal issues and trends to which every nonprofit should pay close attention. Beneath each issue is a link to one or more articles on the topic to provide you with the initial information necessary to do some legal self-examination. Of course, be sure to always consult your organization's legal counsel.

[1.] Understand what the new IRS Form 990 means for your organization. At the very end of last year, the IRS released the much-anticipated overhauled Form 990, the annual information form filed by tax-exempt organizations with the IRS. The form is substantially different from the prior year's version, and should be

carefully scrutinized by your organization now, so that changes in policies, practices and the like can be instituted before it is too late to avoid uncomfortable or embarrassing reporting on the year-end Form 990.

Article:

http://www.venable.com/publications.cfm?action=view&publication_id=1837&publication_type_id=2

[2.] Especially in this election year, know the limitations on your organization's lobbying and political activity so that your voice can be heard.

Myths abound about the limitations or prohibitions on the lobbying and political activity of 501(c)(3) organizations – but many are simply not true. Your organization and its constituency will be best served by your understanding where the limitations lie – and where you can safely engage in needed advocacy. Also be sure to pay attention to the new lobbying disclosure and congressional gift and ethics

rules enacted by Congress last year.

Articles:

http://www.venable.com/publications.cfm?action=view&publication_id=1703&publication_type_id=2

http://www.venable.com/publications.cfm?action=view&publication_id=455&publication_type_id=2

http://www.venable.com/publications.cfm?action=view&publication_id=1822&publication_type_id=2

[3.] Learn lessons from the governance scandals that have plagued the nonprofit sector. From the Smithsonian to the American Red Cross, in 2007, nonprofits were not immune to the governance scandals that seem to recur every year. There are important tips and pitfalls to be gleaned from the mistakes of others – to ensure they do not occur at your organization.

Articles:

http://www.venable.com/publications.cfm?action=view&publication_id=1

660&publication_type_id=2
http://www.venable.com/publications.cfm?action=view&publication_id=1216&publication_type_id=2

[4.] Avoid the most common pitfalls in meeting contracts. While hotel and convention center contracts may not be the most exciting subject in the world, it is incumbent on staff to understand the most common sources of liability for nonprofits. Failure to prudently address these issues in meeting contracts can leave your organization holding the bag for significant unforeseen liabilities.

Articles:

http://www.venable.com/publications.cfm?action=view&publication_id=1717&publication_type_id=2
http://www.venable.com/publications.cfm?action=view&publication_id=1698&publication_type_id=2
http://www.venable.com/publications.cfm?action=view&publication_id=476&publication_type_id=2

[5.] Take full advantage of federal contract and grant opportunities – but understand the restrictions and requirements that come along with them. Federal grant and contract opportunities continue to abound for nonprofit organizations, but many recipients of these opportunities do not understand the full array of complex strings that come attached. Failure to do so can be costly.

Article:

http://www.venable.com/publications.cfm?action=view&publication_id=1477&publication_type_id=2

[6.] Guard against sexual harassment by board members and other volunteers – and know what to do if it happens. Many nonprofits do a good job of protecting the organization’s employees from sexual harassment by other employees, but many do not properly protect them from

such conduct by volunteer leaders. Yet the organization can be liable nonetheless. Understand what proactive policies and procedures you should have in place, and know what to do should an incident or other troubling behavior arise.

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Article:

http://www.venable.com/publications.cfm?action=view&publication_id=1223&publication_type_id=2

[7.] Update your organization's conflict of interest policy and disclosure process. In recent years, awareness of conflicts of interest in the nonprofit sector has probably been at an all-time high. Yet too many nonprofit conflict policies are vague, ambiguous, contradictory, or just incomprehensible. Moreover, many policies are not clear as to how to determine what is and is not a prohibited conflict, and what to do about them. Finally, it is important to have good procedures in place for annual and ongoing disclosure and vetting of potential conflicts of interest.

Article:

http://www.venable.com/publications.cfm?action=view&publication_id=1272&publication_type_id=2

[8.] Understand the complicated world of copyrights and trademarks to both protect your organization from liability and maximize your rights. The law governing copyrights

and trademarks is not intuitive; in fact, it is often counter-intuitive. Many problems in this area can be proactively solved up front with easy solutions, yet if you do not understand the complexities of this area, you may find your organization in a heap of trouble down the road.

Articles:

http://www.venable.com/publications.cfm?action=view&publication_id=1149&publication_type_id=2

http://www.venable.com/publications.cfm?action=view&publication_id=1131&publication_type_id=2

http://www.venable.com/publications.cfm?action=view&publication_id=435&publication_type_id=2

[9.] Protect your organization from legal pitfalls on the Internet. The web can be a hornet's nest of potential liabilities. From copyright and trademark infringement to defamation liability to privacy violations, the legal pitfalls abound. Understand what practices – such as using click-and-accept agreements and sending links to web pages instead of copies – you can institute now to protect your organization down the road.

Articles:

http://www.venable.com/publications.cfm?action=view&publication_id=1119&publication_type_id=2

http://www.venable.com/publications.cfm?action=view&publication_id=480&publication_type_id=2

http://www.venable.com/publications.cfm?action=view&publication_id=451&publication_type_id=2&practice_id=212

http://www.venable.com/publications.cfm?action=view&publication_id=474&publication_type_id=2&practice_id=212

http://www.venable.com/publications.cfm?action=view&publication_id=474&publication_type_id=2&practice_id=212

[10.] Develop an appropriate, defensible system for conducting employee evaluations. And if you need to terminate an employee, do it the right away. Employee lawsuits remain the #1 category – by far – of litigation against nonprofits. To minimize these risks, it is critical to develop appropriate systems and procedures for both evaluating and terminating employees. This is a tricky and risky area of the law – with significant consequences if you don't get it right.

Articles:

http://www.venable.com/publications.cfm?action=view&publication_id=440&publication_type_id=2

http://www.venable.com/publications.cfm?action=view&publication_id=438&publication_type_id=2 ■

FOR MORE INFORMATION, PLEASE CONTACT MR. TENENBAUM AT 202-344-8138 OR JSTENENBAUM@VENABLE.COM.

Member SPOTLIGHT

On January 1, 2007, Marilen Reimer became the new Executive Director for American Council of Engineering Companies of Colorado (ACEC/CO). ACEC/CO is the business association of approximately 250 member firms employing over 10,000 employees in the independent private practice of consulting engineering. Marilen has been with the Council since 1991.



Marilen Reimer
Executive Director
American Council
of Engineering
Companies of
Colorado

Q & A

Q: How did you get into the association business?

A: I didn't realize that you could have a career in association management. Sixteen years ago, I needed to go back to work and went to an employment agency who placed me with ACEC/CO. When I interviewed for the job, I was quite comfortable talking about working with volunteers and meeting planning. I went to national conventions with my parents as a child, attending the dinners and functions, and annually meeting up with the children of my parents' colleagues. As an adult, I have volunteered often for my children's schools and organized their science fairs and planned tournaments for Odyssey of the Mind. Association management is a natural fit for me.

Q: What trends are affecting your industry?

A: Rising healthcare costs are impacting our member firms especially the small firms. Building coalitions and relationships has become increasingly important to ACEC/CO, and for our members. We have been asked by agencies to help them improve their processes, to develop legislation, and to be a strong technical and business resource. We've also been more involved in the legislative process. We encourage our members to know their legislators, track bills, and prepare testimony. Today, our members have a greater

appreciation of the importance of being engaged in this process.

Q: Why did you join CSAE?

A: My former boss, mentor, and past CSAE president, Sandy Donnel, encouraged me to become a member of CSAE and to get involved. Learning the latest trends in association management, sharing ideas and networking with other execs are what I enjoy getting from and hopefully contributing to CSAE. CSAE is our go-to resource when we need vendors, services and professional development programs.

Q: Could you tell us about the Council's plan for you to transition into the executive director's position?

A: Over one year ago, Sandy Donnel retired from the Council after 25 years. We started the transition about 2 years before she retired. At that time, I had been with the Council for 14 years, so the members were very familiar with me. However, there were many aspects of the Council that I only dealt with from the periphery. There was much more I needed to learn. Sandy and I worked closely with our board. They were very supportive. I hired my assistant executive director, Leslie Shivers, one year before I became the exec. During the 1st year of the transition, Sandy reduced her time in the office in order to give me the opportunity to handle more

of the day-to-day operations. The process was a very valuable experience that prepared me, the members and staff for a smooth transition.

Q: Do you have a hobby or passion for any special activity in your personal life?

These last few months I've been reconnecting with old friends which has been a lot of fun. I'm very excited with the arrival of spring to ride my bike more and to take tennis lessons.



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Position with Purpose: Maximizing Revenue and Impact with Your Communication Strategy

> BY ERIN LANDECK, DENVER, CO

You want to recruit and retain members, but you also want to do it in a way that inspires confidence. Here are four key areas to evaluate.

■ Are you sticking to your brand?

Whether it's a membership brochure, an email, or your voice mail message, everything you do should reflect your brand. Are the colors and design elements consistent across promotional pieces? Or do you use four-color photos with purple as an accent color on premium paper for one piece and black-and-white cartoons on pink copy paper for the next? Is your tone consistently formal or casual, according to your brand?

An excellent exercise to test the consistency across your printed

communication is to lay everything you've printed in the last year (including letters, brochures, newsletters, magazines, and emails) out on a table and see if they look like they all came from the same organization and sound like they have the same tone.

"You never see Starbucks spelling their name two different ways," says Janice Roetenberg, president of JR-PR, a Denver-based public-relations and marketing firm. "If you're inconsistent in your marketing, people will think it's reflective of your organization. You have to make it easy for them to recognize you."

■ Do you make every word count?

How many times have you cringed when you saw a typo in your new, crisp copy of the monthly newsletter?



Or perhaps the text in your brochure sounds stilted and formal when your organization wants to come across as open and friendly. Have members or prospective members failed to resonate with a new program or initiative you thought you explained beautifully?

You can avoid many mistakes and make your communication pieces clear and professional by having an editor review them first. Whether someone on staff is trained as an editor or you outsource it to a contract editor, consider the cost an investment in your reputation. "Proofreaders are cheap," comments Leslie Shivers, the Assistant Executive Director of the American Council of Engineering Companies. "Hiring them is not a luxury; it's absolutely essential if your image is important to you."

How can you edit if you haven't budgeted for it this year? First and foremost, use spell check for letters and change your email settings to automatically spell check your outgoing communication. Second, have



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someone else (or two or three people) proof your work before you send it—preferably someone who can look at it with fresh eyes. A quick five minutes spent proofing a simple renewal letter can help you avoid mistakes and ensure that the tone is what you intended. “Don’t be afraid to be casual and friendly in your communications to members,” says Jennifer Dysert, Marketing Manager at the Medical Group Management Association. Use ‘you’ and ‘your’ as much as possible and show members that you understand their needs. Relate to them, and they’ll feel like they belong to something bigger.”

■ Does your look reflect the real you?

Think color, space, texture, shape, and branding. Are you an expert? Why do so many of us—people who would not attempt to fix our own leaky plumbing or represent ourselves in court—assume that just anyone can use desktop publishing software and create a masterpiece of a brochure? Graphic design is an art and a science, and it should be left to those who are trained in the field and have years of experience.

“People who aren’t graphic designers tend to overdo the layout,” observes Shivers. Indeed, you may be guilty of using multiple fonts, more than one type of emphasis (bold, italic, all caps, or underline). “The information gets lost,” she says. And that’s exactly what you don’t want to happen after going to all the trouble to design, print, and mail a piece of marketing collateral that may be the one contact point a prospective member has with your organization.

■ Do you target your message effectively?

“The challenge most of us have,” says Jennifer Watson, Vice President at MGA Communications, “is to avoid trying to be all things to all people. Plan what you want your audience to do, think, or feel. Then focus on two or three points that evoke the response you want, including the benefit to the audience. It sounds easy but it isn’t.”

What’s not easy is to maintain that undying commitment to key messages. Every department head and board member has a pet project or a budget to meet, and many associations’ marketing collateral seems to reflect that. In organizations where time and money are at a premium, you can’t afford to spin your wheels with multiple messages to multiple audiences that change every year or worse, with every marketing campaign.

“What you need is a champion, either in the executive director or in a

board member,” says John Burnett, Professor of Marketing at the Daniels College of Business at the University of Denver, “someone who understands marketing principles and their application.” Burnett cites this example: “Often, nobody can really say what’s wrong with the website in the first place; they just say it has to be redone.”

Nonprofit executives have limited time, are under pressure, and need to achieve many goals. “But,” says Jennifer Watson, “in the midst of it all, remember what’s central: who you are, what you do, and the benefit to the member.” ■

ERIN LANDECK IS A FORMER PUBLISHER, A NONPROFIT EXECUTIVE IN TRANSITION, A FREELANCE EDITOR AND WRITER, AND THE OWNER OF A SMALL-BUSINESS AND NON-PROFIT CONSULTING FIRM.

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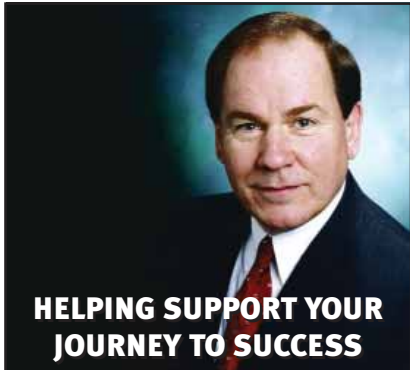


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BOOK Review

> BY GARY LABRANCHE, CAE, EXECUTIVE DIRECTOR OF THE ASSOCIATION FORUM OF CHICAGOLAND



The Opposable Mind: How Successful Leaders Win Through Integrative Thinking

by Roger L. Martin

This book seeks to leverage the wisdom found in an oft-repeated observation by F. Scott Fitzgerald: “The test of a first-rate intelligence is the ability to hold two opposing ideas in mind at the same time and still retain the ability to function.” Martin argues that this ability to integrate opposing ideas is the essential skill of leadership. It is in leveraging this “constructive tension” between “multiple working hypotheses” that leaders discover new solutions and generate untapped value. ■

And finally, a book filled with insights from a few good friends:

Membership Essentials

Published by ASAE & The Center for Association Leadership was edited by Carylann Assante and Sheri Jacobs, CAE.

Prior to joining McKinley Marketing as managing director of its Chicago office, Jacobs was director of membership and marketing for the Forum. Membership Essentials applies the findings of several groundbreaking studies on customer service to the association world and provides powerful, practical insight that every marketing and membership professional can use. Membership Essentials was developed by ASAE’s Membership Section Council and deserves a place on your shelf of core association literature. ■

CEO Tip of the MONTH

Taken from *7 Measures of Success: What Remarkable Associations Do That Others Don't* Published by ASAE & The Center for Association Leadership.

Three steps for success:

1. Be a good neighbor.
2. Seek out and foster relationships with organizations that may not share your overall mission, but do share your desire to accomplish certain goals.
3. Don't make friends for the sake of appearances or profits – do it for the sake of your mission.

DON'T FORGET

Member-to-Member Connection

One of the major benefits of belonging to CSAE is the opportunity to meet and share knowledge of our ever-changing profession with others who face the same challenges.

This is the same reason our Associate Members (Supplier Partners) join the organization...to gain knowledge of what the needs of the Professional member are. They attend meetings and learn what we learn. Because of this awareness, they are better able to serve us than someone who has only a rudimentary knowledge of the industry.

So, if you have need of services or goods that can be provided by our Associate members, or those that advertise regularly in the directory and magazine they should be given consideration before other suppliers who do not have the same knowledge or experience in our industry. It is frustrating to have to educate someone in the vagaries of your business before you spend your members' funds on the service required.

And, conversely, if you have a quality supplier of a current service or materials who is NOT an Associate Member Partner, urge them to join so they can become an even better Partner and increase that Member-to-Member benefit. For details on how to join contact Nancy Erickson, membership chair at Nancy J. Erickson, ATHE at nerickson@aol.com. Advertising in the Executive Memo magazine and the CSAE Directory offers incredible opportunities to educate our membership on the products and services of these new members and increase their business. Contact Soni Fink at soni@pubgroup-intl.com for more information.

Are you a CSAE member with news to share? Tell us about your new promotion, or your awards – we'd like to share the good news in the quarterly Executive Memo! Simply email your press releases and information to joant@csaenet.org ■



Colorado Society of Association Executives

➤ Excellence by Association

Welcome New Members!

Roni Briese, MBP, CPA, CFP
Briese and Associates
roni@brieseandassociates.com

Bill Cairo
Sportswise Presentations
verbatim@lpbroadband.net
Referred by Dick Bruso,
Heard Above The Noise

Ryan R. Call
Zakhem Atherton LLC
rcall@zakhematherton.com
Referred by Vineta Campau, Colorado
Chiropractic Association

Ann Marie Cole
Embassy Suites – Loveland
Annmarie.cole@jqh.com

Roxie Crow
Summit Event Center
roxie.crow@summiteventcenter.com

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174 association professionals earned the CAE credential by achieving a passing score on the December 2007 examination. 79% of those who took the exam passed.

Colorado had 2 successful candidates:
Wendy Grillo, CAE | Julie B. Manssaro, CAE

Continued... New Members!

Dan DeHerrera
Crowne Plaza Denver
ddeherrera@dhmhotels.com

Lu Anne Garvin
Colorado Dental Association
Luanne@cdaonline.org

Diana Lincoln
The Timbers
dlincoln@timbersdenver.com

Ann Mehan Cross
Resource Center for Associations
amehan@resourcenter.com
Referred by Francine Butler,
PhD., CMP, CAE
and David Stumph, IOM, CAE, Resource
Center for Associations

Dana Nass
Golden Printing &
Promotional Products
Referred by The Publishing Group
International, Inc.

Sylvia Rottman
TEAMS, Inc.
sylviar@getteams.com

Stephen J. Yanoviak, CMC
Management Advisors, Inc.
SteveY@managementadvisors.com

Denise Bucher
Doubletree Hotel Denver North
denise.bucher@hilton.com

Jeanne Nicoulin
Colorado Dental Association
Jeanne@cdaonline.org

J. Randy Penn
Colorado Dental Association
randy@cdaonline.org
Referred by Gary Cummins, Colorado
Dental Association

Beth Ritter
The Curtis
beth.ritter@thecurtis.com

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- Unleash your creativity
- Dramatically increase your productivity!

Creating Opportunities: Seeing What Is; Imagining What Can Be

Dick Durrance, II

Creating opportunities is one of life's universal quests. As a student at Dartmouth, Dick Durrance created the opportunity to photograph a forty-five-page cover story for National Geographic magazine and he has been circling the globe since then creating opportunities for clients. Now he travels around the country inspiring audiences of all ages, from high school students to high level executives, to stretch their imaginations so they see what is, and imagine what they can do. Using his photographs from the war in Vietnam, National Geographic assignments, worldwide advertising campaigns, our National Parks, and the world's great golf courses, he will be showing CSAE members how they can work together with their membership to create fresh opportunities for their organizations and themselves. As Albert Einstein famously said: "Imagination is more important than knowledge. Knowledge is limited, imagination reaches around the world."

Balancing Act: Important But Not Urgent

Gregory E. Williams, MBA, American Society of Landscape Architects – Colorado

This is a fast-paced "how to" session. Discover how to keep your day, your week and ultimately your career from being dominated by a mad dash of emergency 10 minute tasks, emails, and phone calls. Discover how to identify and set valuable time aside for the "big picture" items that establish the pace and direction for your organization. Discover how to decide for yourself what the landscape of your career will look like. This interactive group session will draw on humorous and common sense examples from Greg's recent book *Association Management Plain and Simple: Critical Dos and Don'ts for the Solo Executive Director*. Limited to 15 participants.

Boldly Go Where No Association Has Gone Before! Get on Board for an Incredible Voyage to the World of New Media

Dick Bruso, Heard Above the Noise

Branding and New Media expert, Dick Bruso, and producers, Jason Hickman and Fred Kidder, will show you how to take your association's enterprise to the universe and beyond. Come discover, from a "non-techie" perspective, what the future of podcasting, vidcasting, and the very latest technology is all about.

You'll want to join us for an "out of this world" experience that will:

- Create fantastic "top of mind" awareness for your association,
- Significantly enhance revenue via sponsorships and subscriptions,
- Provide greater 24/7 educational opportunities, and
- Powerfully reinforce your relationship with your members on an ongoing basis.

As Mr. Spock would say, "It's quite logical for you to take part in this amazing journey." *Special Note: For those attending last year's session related to New Media there will be lots of "hot off the presses" information you won't want to miss including amazing green screen technology and much more guaranteed to enhance your vision for your association.

Being a Yahoo? Stop! The 7 Reasons Association Leaders Can't Afford to Ignore the Internet

Michael Benidt & Sheryl Kay, Golden Compass, Inc.

Today, the information explosion is getting out of hand, costing organizations a fortune in lost productivity. And yet, used correctly, the Internet is not the CAUSE of information overload; it's the CURE for it. This program covers Internet search tips, tricks and strategies that every association leader can use immediately to:

- Save time
- Save money
- Expand networking relationships

Why is it necessary for leaders to learn more about Internet research? Studies show that 90% of Americans think they already know how to search the Internet. Those same studies show, of course, that they are wrong.

"Don't be a Yahoo!" reveals an entire world of specific time-saving, money-making and competitive advantages – simply by teaching how to get to critical business information quickly and with pinpoint precision. Today, no one has time or energy to waste – and, as Michael & Sheryl say, **"no matter what business you're in, you're in the information business."**

Doing More With Less!

Tim Jackson, CAE, CMP, Colorado Automobile Dealers Association; C. Diane Matt, CAE, Women in Engineering Programs and Advocates Network (WEPAN); Randy Penn, Colorado Dental Association

Doing more with less is simply the way life is – less time, less money, fewer volunteers. Solidifying business relationship, persuing grants, and outsourcing may be helpful but where do you begin and how do evaluate options against your mission, vision and strategic planning? Four success stories will be shared and you are invited to bring your ideas, questions and successes as well. These organizations, despite challenges, are breaking through the barriers to new levels of growth and prosperity, providing an even greater value to their membership and their association mission.

Living Green

A panel of experts from Hospitality, Business & the Association Community

What does “green” mean? A panel of experts from business, hospitality, and the association community will shed light on what it means to go “green”, how to set the pace for your association or business and spheres of influence.

What's In It For Me?

How to Show Members the TRUE Value of Your Association

Ed Rigsbee, CSP, President, Rigsbee Research

How much is your association membership really worth? In order to continue paying dues, your members must believe they are receiving value commensurate with their investment. While many associations and societies do deliver this value, they unfortunately are awful at explaining and demonstrating it to their members. (Not to mention, prospective members!)

In this insightful program, Ed will lead you through a step-by-step process he developed to determine the yearly sustainable dollar value of your association membership. Ed will show you how to:

- Explain and demonstrate the value you deliver to your members
- Calculate an actual dollar value of membership in your association
- Use your value to increase membership and retention
- Broadcast your value to the world
- Empower your members to better promote your association
- Launch your most successful member recruitment campaign ever!

SCHEDULE AT A GLANCE

WEDNESDAY | JUNE 18, 2008

Golf Tournament (by tee time)

6:30 PM **Getting Acquainted:
Meeting Your Coach**

7:30 PM **Opening Reception
& Silent Auction**

THURSDAY | JUNE 19, 2008

6:00-7:00 AM **Yoga, Fun Walk, Run**

7:00-7:45 AM **Breakfast**

7:45-8:00 AM **Opening Remarks**

8:00-9:30 AM **Plenary with Keynote Speaker**

- **Unleashing Your Hidden Genius**
Dr. Jerry V. Teplitz, CSP

9:45-11:00 AM **3 Breakout Sessions (Round #1)**

- **Creating Websites & PR Materials that Really Work!**
*Jerry V. Teplitz,
Jerry Teplitz Enterprises, Inc.*

- **Balancing Act:
Important But Not Urgent**
*Gregory E. Williams, MBA,
American Society of Landscape
Architects – Colorado*

- **Boldly Going Where No
Association Has Gone Before!
Get on Board for an Incredible
Voyage to the World of
New Media**
*Dick Brusco, Heard Above
the Noise*

11:00-11:15 AM BREAK

SCHEDULE AT A GLANCE *continued...*

11:15–12:30 PM **3 Breakout Sessions (Round #2)**

- **Being a Yahoo—Stop! The 7 Reasons Association Leaders Can't Afford to Ignore the Internet**
Michael Benidt & Sheryl Kay, Golden Compass, Inc.
- **Building a Solid Successful Board**
- **It's Really All About the Money: Expense & Revenue Solutions**
Garry Briese, ICF International

12:30–2:00 PM **Luncheon & Keynote**

- **Creating Opportunities: Seeing What Is; Imagining What Can Be**
Dick Durrance, II

2:00–3:15 PM **3 Breakout Sessions (Round #3)**

- **Boldly Going Where No Association Has Gone Before! Get on Board for an Incredible Voyage to the World of New Media**
Dick Bruso, Heard Above the Noise
- **Doing More With Less**
Tim Jackson, CAE, CMP, Colorado Automobile Dealers Association; C. Diane Matt, CAE, Women in Engineering Programs and Advocates Network (WEPAN); Randy Penn
- **The Physics of Closing**
Don Cooper, The Sales Heretic

3:15 PM Afternoon Open

5:30 PM Refreshments & Time to Visit with Colleagues

7:00 PM Reception & Dinner

FRIDAY | JUNE 20, 2008

5:30-6:30 AM Yoga, fun walk, Run

7:00-7:45 AM Breakfast

8:30 AM **Keynote**
• **Growing Your Association with Smart Alliances**
Ed Rigsbee, CSP

9:30 AM BREAK

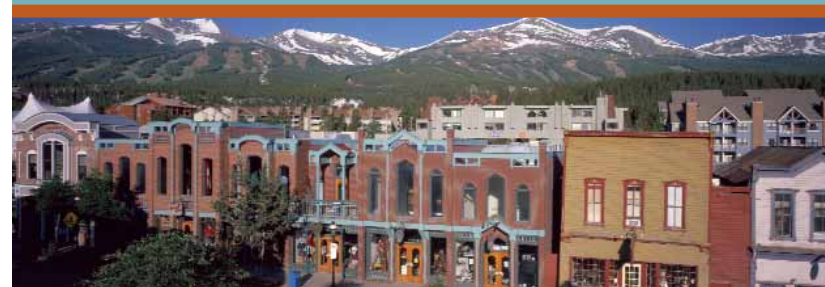
9:45-11:45 AM **3 Breakout Sessions (Round #4)**

- **What's In It For Me? How to Show Members the TRUE Value of Your Association**
Ed Rigsbee, CSP
- **Living Green**
A panel of experts from Hospitality, Business & Associations
- **Balancing Act: Important But Not Urgent**
Gregory E. Williams, MBA, American Society of Landscape Architects – Colorado

12:00-1:30 PM **Lunch & Closing Keynote**
• **Amazed & Amused: Strategies of the Sane & Successful**
Karyn Buxman, MSN, CSP, CPAE

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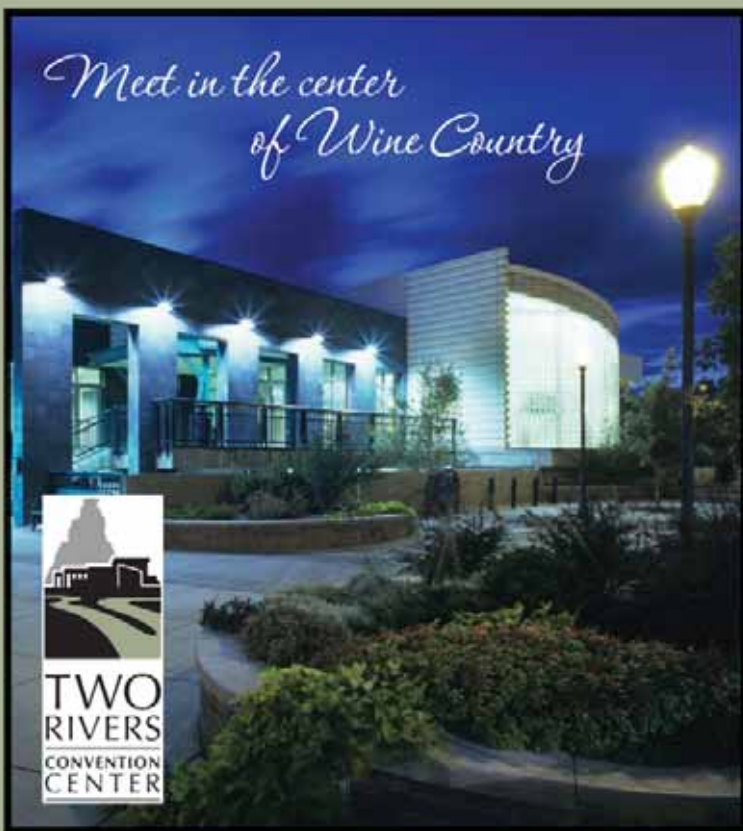
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