

## Mark Your Calendar

**Friday, April 4, 2003**  
Education Program  
*Solutions for Synergy*  
Wyndham Hotel DTC

**Friday, April 4, 2003**  
Membership Luncheon  
*STOP Living Life Like an EMERGENCY!*  
Diane Sieg, RN,  
Lifestyle Counselor  
Wyndham Hotel DTC

**Thursday, May 1, 2003**  
Membership Luncheon  
*Kiss 'Em 'Til Their Lips Are Chapped*  
Tom Letourneau, Customer  
Development Group  
Marriott Denver South, Denver

**May 29-31, 2003**  
*Annual Conference*  
Broadmoor Hotel, Colorado  
Springs

## Why CSAE?

Creating networking  
opportunities  
Serving educational  
needs  
Advancing your  
profession  
Enhancing the  
community

Your career deserves it

CS  
ae

Colorado Society of Association Executives

# Executive Memo

April 2003  
Focus on Membership

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## Member Satisfaction— How Can You Tell?

Member satisfaction can be measured through your association's retention numbers, or maybe in the yearly growth, or maybe if your association's goals were met. If these measurements don't add up to a successful year, you can probably assume that there is something missing. Satisfying members is a daunting task, because everyone wants something different. We may never make each and every member happy, but through good communications, effective programming, consistency, opportunity, and flexibility, we increase our chances to provide a product that meets most of their needs.

### Good Communications

Joining an association is a big step for a new professional and it's our responsibility to make them feel comfortable right from the start. Talk to them, invite them to participate in the association's activities, find out what they expect to receive, then help them fulfill those expectations. New members are very interested in networking, and if your association doesn't have events at which members can meet other members, consider starting networking groups in the geographic areas your association serves. If your association is large enough, designate a staff member to make personal visits to members.

Regularly review your written, online, and other communications. They must be accurate, timely and valuable to your members. Sending notices of events late or having old information on your Web site tells your members you don't care. Set up a communications schedule that ensures they receive

information when they need it, not when you have time to send it.

### Effective Programming

Effective programming will keep the interest of your members and it demands the most work. Associations must have a balance of time-tested programs, as well as new and innovative ones. The old adage, "If they write it, they'll underwrite it," still holds true today. Involve members in the decision making process and they will help you promote it to the other members. It's important to make members feel they are an important part of the planning process. Involvement is the key to member retention.

### Consistency

Members want to know what to expect from their professional association, and where and when they can look for certain information. They want to know that their questions will be answered in a timely manner, and they can trust those answers to be correct. It's okay to restructure programs and operations, but be sure to explain clearly to your membership the reasons for the change—and get their "buy-in."

### Opportunity

Members join associations because they want to "make a difference" in their profession, but most don't know how to get involved in that association's activities. One of the best ways

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### Executive Memo

Executive Memo is the monthly publication of the Colorado Society of Association Executives (CSAE) and is provided as a benefit to members. Submit your article by e-mail to JoanT@csaenet.org. Deadline for all material is six weeks before issue date. Submissions are edited and published as space allows. Letters to the editor, suggestions, comments and encouragement are welcomed. Expressed opinions and statements in this publication do not necessarily represent the opinions of the CSAE board of directors or its membership.

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### President's Message

## Getting the Most Out of Membership

—by Karen M. Wojdyla, CSAE President



It's springtime and hopefully this year the saying "April showers bring May flowers" will hold true for Colorado. Lack of water is just one of the many challenges we must all face on a daily basis.

Organizations also face many challenges. One of CSAE's challenges is to make certain that you are taking full advantage of your membership in the organization. We also want your membership in CSAE to be an enjoyable and rewarding experience.

We can only learn this information directly from you or from what we see statistically. The number of people attending CSAE's monthly luncheon meetings has increased and our educational seminars are providing the interactive dialog that our members have requested. The CSAE Policy Maker Series is giving members the opportunity to rub elbows with Colorado's government officials, legislators and other policy "movers and shakers." We hope these programs, as well as CSAE's many other opportunities, are providing you with the networking, education and information you need to advance your career as an association professional.

One opportunity that includes education, networking, information and much more is coming up on May 29-31, 2003. It's the CSAE Annual Conference at the Broadmoor Hotel, hosted by the members of the Colorado Springs Convention and Visitors Bureau. Besides the beautiful Broadmoor Hotel, the Colorado Springs area has a lot to offer. How many of us from Denver have actually been

to the U.S. Olympic Training Center, Garden of the Gods, Seven Falls, Pikes Peak or the Manitou Cliff Dwellings? These are just a few of the many things to see and do in the Colorado Springs area, not to mention some great restaurants and arts venues. The Colorado Springs Convention and Visitors Bureau will be taking us around the area to visit a number of these attractions, as well as other hotels and venue sites.

I challenge you to make this the biggest and best CSAE Annual Conference that the organization has ever seen. Do you know anyone who is a member of CSAE, but who hasn't been to an event in a while? Give them a call and encourage them to attend CSAE's Annual Conference. If the hour-long drive down to Colorado Springs is too much for them, offer them a ride! We don't want anyone to miss out on the great opportunities that come with membership in CSAE—especially the opportunity to attend the Annual Conference. Remember, CSAE is your organization. Get the most out of your membership.

CSAE—Your Career Deserves It!

Karen M. Wojdyla  
President

*"Because a thing seems difficult for you, do not think it is impossible for anyone to accomplish. But, whatever is possible for another, believe that you, too, are capable of it."*

Marcus Aurelius

## April Education Program

**Solutions for Synergy**  
presented by Amy Meyer, Denver Metro Convention & Visitors Bureau, April DeBaker, American Water Works David Gilfillan, Sage Hospitality and Rich Harter, Fort Collins Convention & Visitors Bureau

Associations + Hotels + CVB's = SUCCESS. Everyone working together will create synergy and help your meeting or convention get off on the right foot! So many things are changing and so many people are affected - it's time to pay attention, communicate and be smart. This seminar will touch base attrition, the economy, rate structures and how we can work together through the changes and still be successful! Join us for the panel discussion including Amy Meyer, Denver Metro Convention & Visitors Bureau; April DeBaker, American Water Works; David Gilfillan, Sage Hospitali-

ty; and Rich Harter, Fort Collins Convention & Visitors Bureau. Full-blown round table discussions will compliment this panel discussion. You'll walk away with ideas you can implement in your next event.

## April Luncheon Program

**STOP Living Life Like an EMERGENCY!**  
presented by Diane Sieg, RN, Lifestyle Counselor

Are you overwhelmed by your own life? Do you find yourself always playing catch up with too much to do, and not enough time to do it? This program will help you identify your specific challenges and develop an action plan to take home to give up the struggle of emergency living! You'll leave with renewed energy and enthusiasm for your own life.

### April Education & Luncheon

**When:** April 4, 2003

**Where:** Wyndham Hotel  
Denver Tech Center

**Directions:** Take I-25 South to the Belleview Avenue. Turn left on Belleview. Turn left onto South Syracuse Street. Turn left onto East Union Avenue.

**Time:** 8:00 a.m. —Check in  
8:30-11:30—Seminar  
11:00 a.m.—Orientation  
11:30 a.m.—Networking  
12:00 noon—Lunch  
12:30 p.m.—Program

**Cost:** See registration form below

Cancellation deadline: 3/31/03

All unfiled reservations will be billed \$35

## CSAE Registration Form

April

Names \_\_\_\_\_

Association/Company \_\_\_\_\_

Phone \_\_\_\_\_

Yes, I am attending for the first time. I am attending as a  CSAE Member  Guest

**Attending new member orientation**  Yes  No **Alternative Luncheon Plate**  Fruit Plate  Vegetable Plate

**Education Program:**  \$89/member  \$64 for second or more from the same association/company

\$139/nonmember  \$89 for second or more from the same association/company

**Luncheon:**  \$30/member  \$35/nonmember

**Total amount due** \$ \_\_\_\_\_

**Method of Payment**  Check  AMEX  Visa/MasterCard

Name \_\_\_\_\_ Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Register today by fax 303-368-4222 — online at www.csaenet.org, or mail to: 2170 S. Parker Road, Suite 265, Denver, Colorado 80231

Here's the CAE question of the month...

Federal antitrust laws require that in order for an association to develop a certification program for its members, it must

- A. Develop written procedures
- B. Charge the same fees for all applicants
- C. Conduct all meetings in a public forum
- D. Permit both members and non-members to be certified

Answer at bottom.

Interested in finding out more about the CAE certification? Call ASAE at 202-626-2772.

Correct answer is D.

## CSAE Member Profile: Thomas J. Hissong, Professional Photographers of Colorado, Inc.

by Heather Palace, KARE Association Management Services, Inc.

*"Happy are those who dream dreams...and are willing to pay the price to make them come true."  
Author unknown*

Tom Hissong is executive director of the Professional Photographers of Colorado, Inc (PPC). He has been in his position for two years and has 25 years of industry-related experience in the field of professional photography.

PPC is a 170-member trade association of independent, professional photographers doing business in Colorado. Tom handles general management duties for the association as well as supervises the newsletter and Web site creation, member communications, educational programming and professional development. He is proud that since he and his team began with PPC in 2001, they have produced a significant increase in membership, improved member communications, facilitated an exponential increase in revenue

and improved the overall financial management of the association.

Tom was born in Grand Rapids, Michigan and has resided in many locations including Dallas, Texas, Rochester, New York, Naperville, Illinois and Littleton, Colorado. His multiple corporate relocations were due to his 15-year career with Eastman Kodak Company.

He and his wife, Sally, have been married 24 years and have two children—Ryan, a 20-year old student at CU-Boulder and Kristin, a 17-year old student at Columbine High School. They have two pets, "twin" Miniature Schnauzers named Mia and Cujo. In his free time, Tom enjoys golf, skiing and outdoor activities. He is also currently completing his MBA at the University of Colorado at Denver, Graduate School of Business, with an emphasis on organizational development and entrepreneurial studies.

Tom also enjoys consult-

ing in the fields of sales, marketing, management development and training, with involvement spanning from sole proprietorships to Fortune 500 companies. In result of his hard work, he has received many business-related awards and recognition throughout his career.

When asked the question, "Where will you be and what would you like to be doing in 10 years," Tom replied, "I hope to continue to develop and refine my association management, business consultation and training activities from residences in Colorado and San Diego, California."

If you see Tom Hissong at a future CSAE educational seminar or luncheon, say hello and welcome him to our organization! To contact Tom further, his phone number is 303-933-9461 and his email address is PPColorado@aol.com; PPC's Web site address is www.PPColorado.com. Welcome to CSAE, Tom! ♦

### New Members

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## CSAE ListServes: Everything You Always Wanted to Know... But Were Afraid to Ask!

by Tim Blum, Rocky Mountain Electrical League

There are three listserves provided by CSAE. The first is dedicated to professional members—[csae\\_professionals@csaenet.org](mailto:csae_professionals@csaenet.org); the second to associate members [csae\\_associates@csaenet.org](mailto:csae_associates@csaenet.org); and the third for the executive circle [csae\\_executivecircle@csaenet.org](mailto:csae_executivecircle@csaenet.org). Here are some tips to help you navigate through CSAE's listserves.

**What is a listserv?** A listserv is a supercharged, interactive e-mail list. When you send a message to the list, that message is then served, commonly referred to as sent, to everyone on the list. Each listserv provides subscribers an address where messages can be sent.

**What is the purpose of the listserv?** The listserv can be a very useful tool in a number of ways. A listserv in the simplest terms is an e-mail discussion group. Subscribers come together using this tool to share information. The listserv is a forum, much like that of a face-to-face CSAE meeting, except all the discussion happens over e-mail.

**What is a subscriber?** A listserv is nothing more than a list of e-mail addresses. If your e-mail address is on this list, you are known as a subscriber to the listserv.

**Why should I be a subscriber?** In some ways it's better than a face-to-face meeting because you are able to ask a question or share an answer with an entire list of people all at once. The potential variety of discussions and assortment of answers is endless.

**How do I unsubscribe from the list?** The listserv is interactive in that a person can unsubscribe from the e-mail list at anytime. This process is automated and usually varies from listserv to listserv. To unsubscribe from the CSAE listserv

you send a message to the list with the word unsubscribe in the subject line of your message. Nothing should be written in the body of the message.

**How do I send a message to the listserv?** Only subscribers may post messages to the list. If you are a subscriber, this can be done very easily.

1. Create a new e-mail message.
2. Enter the e-mail address of the listserv into the "To" field of your email message.
3. Enter a descriptive subject of your message into the "Subject" line of your e-mail message.
4. Type your message into the "Body" portion of the e-mail message.
5. Following your message add your name, title, company, and phone number.
6. Click send.

Once you click send your message will be sent to all subscribers of the listserv. You will receive a copy of your own message since you are a subscriber of the listserv.

**How do I respond to a question on the listserv?** Follow the instructions under "How do I send a message to the listserv." The only change is that instead of creating a new message (step one), just hit the reply button on the email message you received that contained the question your responding to. Your reply will be sent to the entire list. To reply to only the individual who had the question, make sure the e-mail address of that person is in the "To" field of the e-mail, and the listserv address is not.

**What is a bulletin board and how does it relate to a listserv?** Something very similar to a listserv is a bulletin board. These are two different technologies.

With a listserv, subscribers receive messages posted to the list directly into their e-mail program inbox. A bulletin board requires a subscriber to go to a web site, and post a message on that web site. The message does not go directly into the other subscribers inboxes. Instead a bulletin board subscriber must also go to that Web page to read the newly posted message. A good comparison might be that college bulletin board where everyone posted messages versus a phone tree where you received a phone call directly.

**What questions can I ask on the listserv?** Almost all questions related to associations are appropriate. Questions regarding operational practices are most common. Questions not related to association business should be limited, if posted at all. For these types of questions, begin the subject of the email message with "Off Topic," so other subscribers are aware of the message content.

**Do I respond to the listserv or the individual who sent the question?** If the information would be helpful to most of the subscribers, send the response to the list (just hit reply). If you have personal, sensitive or off topic information, reply to the individual only.

**Is there any unique listserv etiquette?** Listserves are informal. This means messages simply stating "Thank you," "I don't know," and "Sorry I can't help" and the like, aren't needed. Although this is normally good manners face to face, these pleasantries are assumed by the subscribers and only add unnecessary clutter to inboxes. Obscene, offensive, libelous, derogatory messages are also off limits. Do not post copyrighted materials. ♦

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**Member Satisfaction**

*Continued from page 1*

to involve members is just ask them to participate. A personal invitation to a member makes them feel wanted and needed. Opportunities abound in service on committees, task forces, and special projects, and you should be sure to include your members from distant locations. You might help them with travel expenses, set up

conference calls so they can participate via phone, or develop a video conferencing system.

**Flexibility**

The association executive must be a contortionist at times to deal with the variety of personalities in an association. It's necessary to recognize the differences in your membership and learn how to bring this diverse group

together into a consensus building team. Helping your members succeed will guarantee their continued participation.

Give your members what they want by first finding out what it is. If you communicate with them, provide the programming they need, give them the opportunities to participate in the association, and be consistent and flexible. They will keep coming back for more. ♦

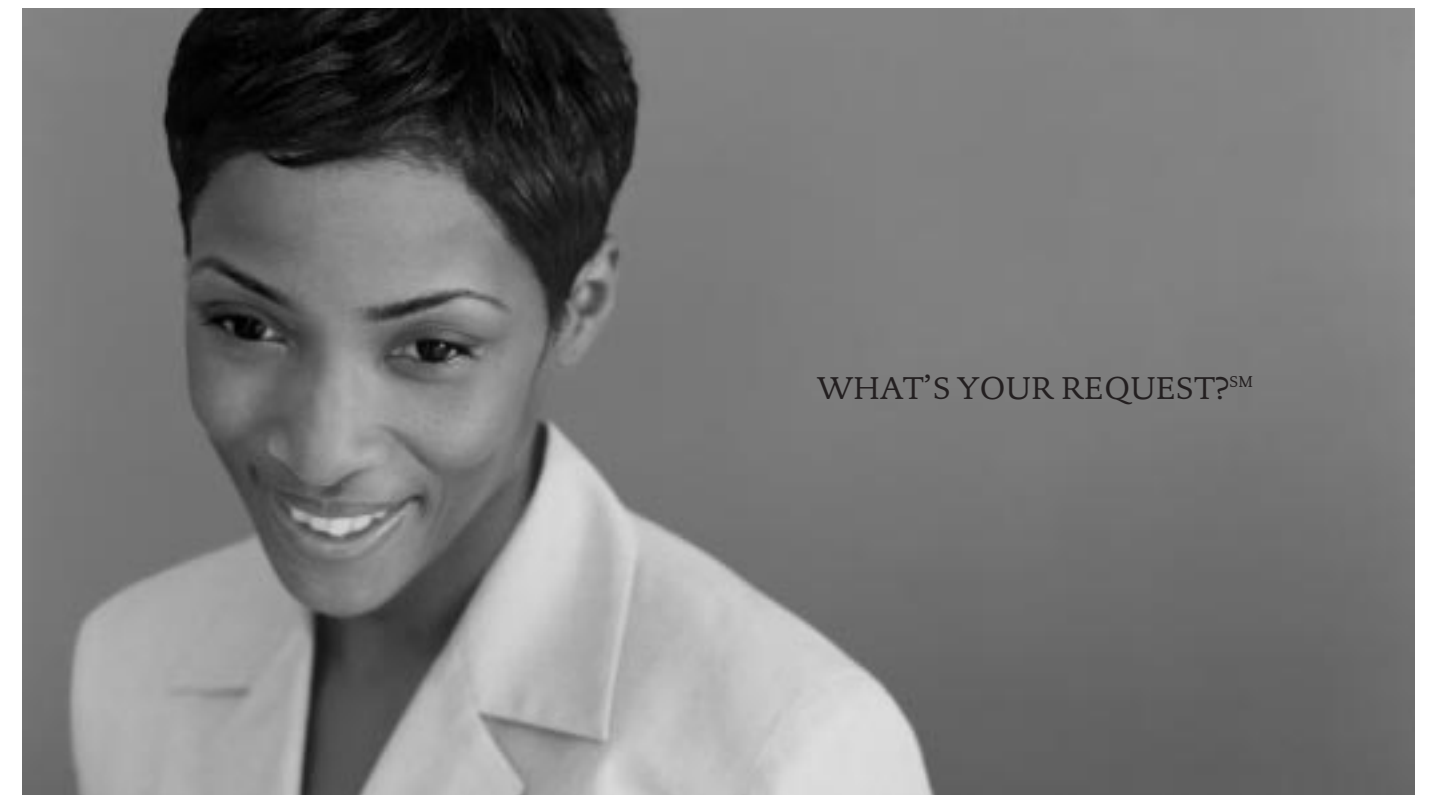
**Make Your Members Feel Valued**

The CSAE Communications/Editorial Committee has compiled a list of ways to make your new members feel welcome and valued. The following are just a start, and we welcome your additions.

- 1 Issue a personal invitation to a meeting, and be their personal mentor at the meeting.
- 2 Make some kind of contact with the new member immediately upon receiving application.
- 3 Create a "buddy system" that pairs current members with new members.
- 4 Profile new members in your communications.
- 5 Ask new members to share their expertise with others.
- 6 Offer opportunities for involvement, and personally invite the new members to participate.
- 7 Send handwritten communications. It really impresses members.
- 8 Visit the member on their "home turf" to explain services and benefits of membership.



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## Tech Tip: Restore Deleted Files in Windows

Quick tips to improve your day-to-day work and increase the efficiency of your organization. E-mail your tips to Tim Blum at [timblum@rnel.org](mailto:timblum@rnel.org).

Ever deleted a file, just to realize you actually needed it? If you accidentally trash a file in Windows, there is a simple way to recover the file. First off, don't panic. If you deleted the file, it goes into the Recycle Bin. To recover a file from the recycle bin follow these steps.

1. Double-click on the *Recycle Bin* icon on your desktop
2. When the recycle bin window opens, single click on the file you want to recover

3. To select multiple files, hold the CTRL key down as you click on the files.
4. Go up to the *File* menu and select *Restore*.
5. The files you selected will automatically be put back in the place they were originally deleted from.

If you have already emptied the recycle bin, recovery can be a bit more difficult. You will need to use file recovery software. There are freeware and shareware programs available. Check <http://download.com> for the latest versions. ♦

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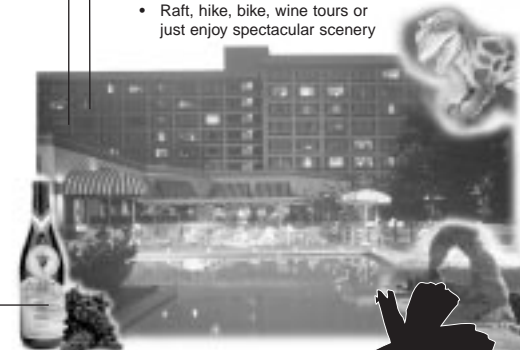
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## Benefits of CSAE Membership for Your Staff

by Karen M. Renshaw, CAE, KARE Association Management Services, Inc.

The benefit of membership in CSAE for your staff is twofold. First, this way you can send a staff member to volunteer and you don't have to do it all the time. Except when they peg you to write an article like this, as my staff member did.

Second, and seriously, it is an excellent educational and networking tool. The educational programming found at and through CSAE can be another facet of your in-house training. As we all know, staff training is an ongoing aspect of jobs as managers. With CSAE, you do not always have to be the trainer, you can take a rest and let someone else share their "pearls of wisdom." CSAE can provide you with technical experts and future contacts for those questions that cannot be

answered in-house. Knowing where to look and who to ask is an extremely valuable tool for our staff to have in their "office toolbox."

The networking opportunities are one of the greatest benefits that we already know and use. By giving staff members other individuals to discuss issues with, they can bring back to your organization a broader range of ideas and suggestions to enhance the operation. As association managers we cannot operate in a vacuum and often we are so busy that we can no longer attend everything. By picking one networking opportunity over another we can miss valuable information, so why not divide and conquer this massive task.

If a roadblock to your adding a staff member to CSAE's membership when

you do your dues check has been cost, ask yourself this question—"What is my time worth?" Remember that your time spent in staff training and networking is costly, too. If you were to consider the cost of your time out of the office versus a member of your staff which is the better "buy?" Also, there is that issue of dividing yourself into so many pieces to get things accomplished. Isn't that why you added staff, so you did not have to do everything? Well, membership in CSAE is just another one of those things that your staff can help you accomplish.

So with that said, is there any reason why you do not have at least one member of your staff join you in membership with CSAE? ♦

## Colorado Associations Provide Community Services

We asked, and our Members responded—What are Colorado associations doing to advance America? We should all be proud!

### Peter B. DeBlois, EDUCAUSE—

There are two community service initiatives EDUCAUSE is currently advancing:

- ♦ .edu Domain Administration—Following a proposal to the US Department of Commerce (DoC), EDUCAUSE was selected in October 2001 to become sole registrar for .edu Internet domain names/addresses. In August 2003, EDUCAUSE will complete its

assumption of full responsibility for the .edu registry.

- ♦ National Strategy to Secure Cyberspace—Following September 11, EDUCAUSE and Internet2, a consortium for developing advanced network applications and technologies, coordinated The Higher Education Contribution to the National Strategy to Secure Cyberspace. This initiative was recently selected for honor roll designation in the 2003 ASAE Associations Advance America award program. Outreach efforts in 2003 will include a security summit of college and university presidents and information technology leaders; presentations at national and regional conferences; Web site resource postings; and partnering with organizations that compose the Higher Education Information Technology Alliance.

**Dorothy Shadrick, Colorado Association of Mortgage Brokers and Colorado Podiatric Medical Association**—Colorado Association of Mortgage Brokers are staffing a Mortgage Line to assist consumers in mortgage-related questions, coordinating a silent auction to benefit Colorado Legal Assistance Fund, and hosting an annual golf tournament to benefit the Housing Opportunity Assistance Program of Aurora.

Colorado Podiatric Medical Association members are volunteering to provide podiatric screenings at nine health fair sites. ♦

*Each month we will feature additional community service projects. Update us on your association community service projects. E-mail Joan Tezak at joant@csae.net.org.*

## NPR—Keeping Busy in the Rocky Mountains

It is not every day that you find an association management company located 165 miles from Denver in the Colorado mountains. But, when Non-Profit Resources, Inc. (NPR) made the decision to locate in Glenwood Springs three years ago, the choice was easy.

So says Stan Orr, CAE, a principal partner in the firm. After all, all of its clients are national/international-based organizations, and all NPR needed was high-speed Internet access, phones, and a reasonable proximity to an airport to support its organizations. "Besides," says Orr. "Who'd want to live anywhere else?"

The other principal partner in the company, his life partner Cindy Challis Orr, CAE, is a native of Colorado. She began her career in association work as membership director for the Rocky Mountain Chapter of Associated Builders and Contractors (ABC).

Stan, on the other hand, has served as chief staff officer of ABC of Oklahoma and California, the Oklahoma Association of Realtors and the National Association of Legal Secretaries.

Combined, the two have over 40 years experience managing organizations. Both have earned the Certified Association Executive (CAE) designation and Stan is a member of the prestigious Fellows of the American Society of Association Executives. Additionally, Stan served as the president of the Oklahoma SAE (1992) and was honored as Oklahoma's Association Executive of the Year in 1993. Cindy also served on the OSAE board of directors.

NPR currently manages several trade associations, professional societies and foundations. They provide a full range of services, including meetings, education, communications and IT, certification, and, of course, general management.

NPR manages to keep its staff small through the effective use of what it terms *outsourcing providers*. According to Cindy,

"Our goal is to provide cost-effective service to our clients. For instance, for our organization's national publications, our editor is in Pennsylvania, the publisher is in South Carolina, the printers are in Oklahoma and Canada and the mail house is in Oklahoma." Plus we use

numerous local area vendors for various aspects of projects and programs."

The formula appears to work well for the company, which had its best year ever in 2002. And after all, how bad could it be when your office resides six feet from heaven? ♦

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## Instant Weight Loss: Lose Pounds of Paper

by Melly Kinnard, *Get Organized!*

I'd like to help you achieve a "lean" office. Cleaning out your files and recycling paper brings great satisfaction. Instead of battling the bulge of papers, you gain control. Controlling paper is like controlling your weight—it takes constant work. If you ease up, you're quickly out of control. There is a difference between paper shuffling and paper management.

**Reduce**—Don't buy more file cabinets. Clean out the ones you have.

**Exercise**—the delete key. A man I work with in Seattle makes a copy of

every e-mail. This is overkill. Computers are supposed to cut down on paper not increase it.

**Clean out**—your files just as you do your refrigerator and home when you set your mind to lose weight. Leave items that help you achieve your goal of lean and mean.

Being overweight slows you down, it's harder to navigate your body, you feel sluggish—just like you do in your office if it is weighted down with paper.

Before you save something ask yourself:

1. Does it make money, save money, save time or improve the quality of your life?
2. How long has it been since you have used it?
3. How, when and where will you use it?
4. Does anyone else have this information?
5. Does it support you, your family, your career or community?
6. Is this item replaceable?
7. Does it have historic value?
8. How many duplicates do you need?



9. What is the worst thing that would happen if you threw or gave it away?

Celebrate your paper loss! ♦

Melly Kinnard is a speaker, author and professional organizer. Melly is the author of *Get Organized!*, *I Need a Wife!* and *Gifts From the Heart*. Go to Melly's Web site [www.mellykinnard.com](http://www.mellykinnard.com) or call 303-762-9920.



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## Investment Principles that Always Apply

by Lisa Ullsperger, *Vice President, Business Development Tempest Investment Counselors, Inc.*

One thing that has become painfully obvious during the bear market is that certain investing principles always apply, and investors who ignored these principles are now trying to figure out how to protect their portfolios (what is left, in some cases) from risk. Many different complex techniques are being proposed as a cure-all, but what this article suggests is really quite simple: diversification. This is truly the best way of controlling portfolio risk and yet many investors do not practice good diversification. Unfortunately for these investors, one lesson of the recent tech/dot-com boom-bust underscored the importance of this very concept and the inherent risks of portfolio concentration.

In the late 1990s, the financial markets proved to be irresistible for many investors who let greed blind them to obvious dangers. It is especially true in times of market mania that the wisdom of diversifying becomes even more important. However, diversifying risks is an ongoing process, not just something that is done during periods of "irrational exuberance."

To diversify, however, requires courage and discipline. Making such a decision in favor of risk control implies giving up the chance to make a killing. History has shown us that a diversified portfolio, usually with an emphasis on equities, is the surest way to accumulate wealth over the long term. Diversification is an ongoing essential tool for long term investing success, and the astute investor shouldn't let others sway him or her with the latest fad.

Too many investors forgot this basic principle several years ago and their lack of diversification proved financially disastrous. Let us remember the lesson and make the appropriate changes to our portfolios and diversify our investment risk going forward. ♦

The CSAE Membership Committee extends our thanks to CSAE Member Linda Schafer, GL Specialties, for the beautiful new "java mugs" imprinted with the CSAE logo. They make a wonderful impression on our new and prospective members! Thank you Linda!

Russ Miller  
Director of Golf at The Broadmoor



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# Business Filters for Nonprofits

by Bob Harris, CAE, Harris Management Group

A "filter" is a method to assist leaders and staff in making decisions. Facts are run through a set of questions – "the filter" – to insure the best interests of the organization.

Here are three distinct filters regarding membership organization activities. The first deals with strategic planning; the second with endorsing benefits; and the last focuses on new programs and activities.

## Strategic Planning Filter

Brainstorming and strategic planning sessions often result in many new ideas. Sometimes the enthusiasm of the moment can lead an organization down an unintended path – eventually wasting time and resources. Consider these five questions at the onset of strategic planning.

1. Does it fit within the mission statement?
2. Who is the primary customer? Will it sidetrack valuable resources from serving the primary members?
3. What is the economic impact?
4. Do we adequately know the needs of members?
5. Does the program offer real value (return on investment - ROI)?

## Endorsed Benefits Filter

Some programs are endorsed

by the board and promoted to members. Answer these three questions first. Like a tripod, if the product or program fails any one question, it will not stand on its own.

1. Do members turn to the organization for the benefit—do they contact the association for that sort of service? The adage, "if you build it, they will come," seldom works.
2. Will the program offer a distinct advantage to members? Advantages are not always based on price but may include enhanced service or private access for members only.
3. Will the organization receive adequate compensation for the time, marketing, and liability associated with the endorsed program (without adding a risk of unrelated business income tax – UBIT.)

## Programs and Activities Filter

New programs and activities are often considered to serve the needs of the members. They take the form of new meetings, publications, services, etc. Tailor this six-question filter to your organization.

1. Is the program or activity of real importance to a majority of members?
2. Does the program or activity significantly

3. Is the program or activity within the bounds of our mission, vision, values, bylaws, articles of incorporation and policies?
4. Will the program or activity drain or add to the organization's resources? If it drains resources at the onset, what is the return on investment?
5. Does the program or activity better position the organization?
6. Can the program or activity be protected as an

## Are You Getting the Most from Your Financial Software?

by Teri Carpenter, Armstrong Enterprise Communications Inc.

In today's economic climate of falling revenue and low returns, making the decision to upgrade your financial system may seem like a bad idea, but it could be a very smart move. The trick is to know what you are looking for and how to prove that the investment is prudent.

Most organizations have a combination of software that is used for various purposes. Each piece serves its purpose for gathering and measuring data and performing standard tasks. However, most of the software pack-

ages don't "talk" to each other. This creates a system of inefficiencies in that there are duplicate efforts for entering, tracking and reporting. Three or four different individuals or departments may track the same information in different ways and for different purposes. Also, we typically find in accounting departments that lots of external spreadsheets are utilized to validate and verify amounts in the software because they cannot rely on the accuracy of the informa-

tion. You are probably familiar with some of these issues. The obvious problem here is the time and possible errors created when data is entered multiple times. However, saving time on data input alone is not enough of a compelling reason to make a change. Areas to examine are:

Bob Harris, CAE, is a strategic planner and trainer with a focus on non-profit operations and efficiency. Contact bob@rchcae.com or 850-570-6000.

Continued on page 9

## Financial Software

Continued from page 8

exclusive offer by the organization or will similar programs dilute it?

Filters are a way to maintain the integrity of the organization. They are built upon the organization's mission, members' needs and sound management principles. ♦

- ♦ Missed revenue—are billings to members missed because dates are not easy to come by or not all information is in the same database? (revenue generation)
- ♦ Member satisfaction—is satisfaction and possibly retention suffering because members do not get information or responses as timely as they would like? (member retention)
- ♦ Growth constraints—are growth initiatives stalled because adding more services would require hiring when there is no budget for headcount? (growth management)
- ♦ Inconsistent data—are there differences between what your membership system shows for revenue and your financial reports reflect? Do you have to wait until the month is over to know how you are doing? (ability to react timely)

These types of questions when quantified can give economic measurements of how quickly a new, integrated system could pay for itself in terms of reducing current workload. This allows for new tasks, quicker response to requests as information is easily located and accessible by all who need it, and provides information to operate proactively rather than reactive.

Certainly there are other issues and indicators that you may find in your organization. The next step is to measure the problem in some quantifiable way so that goals can be set and results measured. By building a business case around quantifiable inefficiencies you can easily show value and payback for investing in an integrated solution. It will also provide you with a way to

measure the success of a new software initiative. ♦

Teri Carpenter, CMA, CMB is an accounting software consultant with over 20 years experience in software implementations. She can be reached at Armstrong (303) 741-5276 x206 or tcarpenter@arment.com

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