

Mark Your Calendar

Thursday, March 6, 2003

Education Program
Continuous Budgeting for Not-for-Profit Organizations
Ed McMillan, CPA, CAE
Hyatt Regency Denver, Denver

Thursday, March 6, 2003

Membership Luncheon
7 Surefire Steps to Assure Paying the Most Taxes Possible
Libby Smith, Accounting for Success, P.C.
Hyatt Regency Denver, Denver

Tuesday, March 25, 2003

Technology Solutions Conference
Denver Merchandise Mart, Denver

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

Executive Memo

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Colorado Society of Association Executives

Executive Memo

March 2003

Focus on Legislative Process/Community Service

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The Legislative Process: Play or Pay?

by Paul Schauer, Managing Director, CRMCA/CRPA, Former Colorado State Representative, Current Regent—University of Colorado

"The price of liberty is eternal vigilance."

Why should I be involved in the legislative process? What good will it do? Will they listen to my concerns and ideas? Is it really important?

Why should you be involved? There are probably very few issues or activities that you deal with on a daily basis, that are not in some way influenced by a government rule or regulation. Each rule and regulation has its origin in some legislative mandate. If you are not involved with legislative deliberations then you have missed the first opportunity to have an impact on the eventual outcome of rules and regulations. Often, only those that seek to benefit or gain some control from legislative action participate in the discussions, which gives the elected officials only part of the story.

What good will it do? What harm will occur if you do not participate? Elected officials cannot know every aspect of the many issues that confront them. If you do not take some of their time and share your knowledge and concerns, then they make decisions that do not represent the concerns of the broader community. You may not stop the enactment of bad legislation, but you may reduce potential adverse action. It really is a "play or pay" situation. Almost any contact is better than none. Of course, solid evidence to support your position increases your credibility.

Will they listen? Depending on the governing level, it is possible to talk directly with your elected officials. At all levels, officials track the number of visits, e-mails, letters, and phone calls received on a specific piece of legislation or issue. They track communica-

tion in many different ways. Communication from their district, opposition versus proponents, individuals versus special interest groups or any way that helps them make decisions. Many times, especially at the state legislature, no contacts are received on a particular piece of pending legislation. Five to ten contacts can be very influential. In my experience, I would put all the messages or contacts received on a particular piece of legislation in the bill file, which each member has beside their desk in the respective chamber. This made it easy to determine what action I would take by reviewing the communication.

Is it really important? Is the welfare of your association members important? It is very tiresome to me to hear groups or individuals say, "why get involved, it doesn't do any good." When querying them, their definition of good is for them to get their way totally. One cannot expect every decision to be made as they want, because every issue has multiple sides and if we are a democracy then all sides deserve to be heard and considered. Compromise is not a four-letter word, it is life. To influence a compromise you must be involved.

Throughout my legislative career it always amazed me how few citizens participated in the governing process. Not as elected officials, but in simply communicating their knowledge and concerns about issues that were being debated. I am disappointed when I hear disparaging comments about decisions made by public officials, when there was no participation in the governing, decision-making

Executive Memo

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President's Message

Technology: Help or Hindrance?

—by Karen M. Wojdyla, CSAE President

This month's issue of *Executive Memo* focuses on two topics of interest to CSAE members—industry legislation and community service. No matter what your position in the industry, CSAE's Legislative Education Program Series offers you an opportunity to learn about legislation that may have an impact on you, both personally and professionally. In this issue, Mary Jordan has also put together an article on community service. Many of our members are involved in a variety of community service projects and programs. This article will help you learn more about what our members are doing and the kinds of things you can do to help our community.

How many of us really understand what lobbying is all about? You may not have a lobbyist on staff or contract with an independent lobbyist, but understanding lobbying and knowing how to choose a lobbyist is an important aspect of being an association executive. Our associations need to be visible and known to legislators so that important rules, laws and regulations serve our industry in the best way possible. A lobbyist works with legislators to do just that, in addition to keeping track of pending legislation.

I believe that it's important to think about where legislation comes from. A lot of it starts at the local level. Last year, I decided to become involved on one of the boards/commissions in my community. I thought it was about time to see how these types of government organizations work. My ultimate goal was to be a part of making my community a better place to live. I didn't get assigned to the board I wanted, but I'm finding that the board I am on can have a great impact on the community as well. I've also made the time to attend City Council meetings, so I can understand how and why decisions are made before I read about them in the paper and can't do anything to change them. Understanding how your local government works and participating in the process can be a real "eye-opener," as well as enabling you to



make a difference in your own community.

The same holds true for our state government. For those of us located in the Denver metropolitan area, we have the ability to go down to the capitol and see firsthand how our state government is run. Depending on your personal and/or professional agenda, it is important to know our elected officials. These are the folks who make the laws that can have a profound effect on our daily lives.

If you don't have an interest in getting involved in local government, there are many other types of community service activities in which you can participate. Are you or your organization involved in a community service program? In Colorado, there are a huge number of non-profit, community-based organizations that need your help. The opportunity to help others by sharing your knowledge, expertise and compassion is a great opportunity to grow, both personally and professionally. CSAE, as an organization, is involved with Network for the Needy.

March is a great time to do some Spring cleaning, whether it is finally cleaning out your office at work or stepping back and getting rid of some annoying little issue that you have been carrying around in your head for months. It's also a good time to think about "making a difference" by getting more involved—in CSAE, community service projects or by participating in your local government.

Lastly, don't forget to mark your calendars for our Annual Conference in Colorado Springs, May 29–31, 2003. This is the only opportunity we have to network for two straight days without any outside distractions! Great educational opportunities! Great fun! Mark your calendars now! You don't want to miss it!

CSAE—Your Career Deserves it!

Karen M. Wojdyla
Karen M. Wojdyla
President

Education Program

Continuous Budgeting for Not-for-Profit Organizations

presented by Ed McMillan, CPA, CAE

Is your current budgeting system an annual time-consuming exercise in drudgery? Despite hours of staff time, is your finished budget merely a restatement of the prior year's actual figures restated for inflation and other factors and divided by 12? Is your fiscal accountability nonexistent? It doesn't have to be that way! This session will provide you with the knowledge of a new budgeting method that is easy to implement, easy to monitor, ensures fiscal accountability, and is so effective that it nearly eliminated the year-end budgeting process.

Luncheon Program

7 Surefire Steps to Assure Paying the Most Taxes Possible

presented by Libby Smith, Accounting for Success, P.C.

This tongue-in-cheek title pokes fun at all the serious tax season talks while imparting practical suggestions for year-round tax savings. Just in time for you to evaluate your personal tax reporting issues and even apply some of the concepts to your organization.

Cancellation deadline: 3/3/03

All unfiled reservations will be billed \$35

March Luncheon

When: March 6, 2003

Where: Hyatt Regency Denver

Directions: From the south take I-25N to Exit 210A. Merge onto W. Colfax Ave., turn Left on Stout St. Turn right onto 17th St. Turn left on Welton St.

Time: 8:00 a.m.—Check in
8:30–4:30—Seminar
11:00 a.m.—Orientation
11:30 a.m.—Networking
12:00 noon—Lunch
12:30 p.m.—Program

Cost: **Education Program**
\$150 for three from same association/company
\$130 for two from same association/company
\$89 per registrant
Luncheon Program
\$30/pre-registered members
\$35 walk-in members
\$35 non-members

CSAE Registration Form

March

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: \$150/three from same association/company \$130/two from same association/company

\$89 per registrant

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

A non-exempt employee has worked 50 hours this week - 15 hours over the usual 35 hours considered full-time in the association. He states that it is not necessary to pay him overtime because he wants to take an extra day of vacation in a few months. Which of the following options is the most cost-effective legal solution?

- A. Pay straight time for 50 hours.
- B. Pay straight time for 40 hours and time-and-a-half for 10 hours.
- C. Pay straight time for 35 hours and time-and-a-half for 15 hours.
- D. Grant the employee 10 hours of vacation time to be used later as requested.

Answer at bottom.

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

Correct answer is B.

CSAE Member Profile: Mark Linnell, LinnellTaylor Marketing

by Mo Goldman—ConferenceDirect



Mark Linnell is president of Linnell-Taylor Marketing. He and his staff of eight do marketing, advertising and public relations for associations and societies. Mark has been an ASAE member for six years and a CSAE member for two years. He's a regular at monthly meetings, attended the 2002 Annual Conference in Snowmass and is currently on the membership committee.

Mark began his career as a print salesman. After purchasing the company in 1979 he added graphics, advertising, event planning, video production and public rela-

tions. It evolved into a full-service marketing company for associations—including the U.S. Bowling Council and the National Apartment Association.

Born and raised in southern California, Mark attended Pepperdine University studying business and communications, while his father was an accounting professor there.

Mark's wife, Jackie, is the company's bookkeeper. They have four daughters and a grandchild—all who live in Colorado. Mark and Jackie live on a 35 acre horse ranch west of Loveland. They own three horses and board nine. Mark calls himself a 'barn boy' who likes to repair equipment and take care of his Harleys.

Mark considers "identifying and enabling key staff to grow in the industry and become good leaders" as a major career accomplishment. A good client for him would be "an association or society looking to outsource the marketing communications to improve their organization."

His agency offers a number of marketing services such as branding, membership development programs and public relations. I asked Mark what he would like to be doing in 10 years and he responded 'exactly what I'm doing, but maybe not in the leadership role.' If you would like to talk to Mark about successfully marketing your business, call 303-684-0300 or e-mail him at mark@linnelltaylor.com. ♦

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Effective Lobbying

Cathy Garcia, President/COO, Action 22, Inc.

Ever wonder how a not-for-profit organization could get involved in the state legislative process? No matter if your association has a small staff, lobbying the state legislature is not only possible, but also encouraged. Your elected officials need to hear your members' viewpoints.

What is lobbying? As defined by the Secretary of State, "lobbying means communicating directly, or soliciting others to communicate, with a covered official for the purpose of aiding in or influencing the drafting, passing, defeating of bills, resolutions or amendments being considered by the State General Assembly."

Some organizations are lucky enough to have a professional lobbyist (see accompanying article) either on staff or as an outside consultant. A professional lobbyist is one who is compensated for lobbying. His or her main job is to lobby. "Professional lobbyists" must register with the Secretary of State by July 15 of each year and file disclosure statements (CRS Section 24-6-302).

Many associations do not have a professional lobbyist on their staff or as a consultant and many executive directors, president/CEOs or designated staff members act as a volunteer lobbyists. Volunteer lobbyists are individuals who engage in lobbying from time to time (not their main job) and whose only receipt of money consists of nothing more than reimbursement for expenses such as parking, meals, travel and lodging.

Volunteer lobbyists need not register with the Secretary of State. However, if you spend a large part of your time at the State Capitol during the legislative session, then your association salary may be considered compensation for lobbying and you may need to register as a professional lobbyist.

As a volunteer lobbyist, your association's voice can be heard. The first step

is to develop a set of legislative priorities of your association. Five or less priorities are easier to communicate to your legislative delegation. Once your membership has set its priorities, then a group of two-three persons for each priority should volunteer to assist you in lobbying. These volunteers need to take ownership and have a passion for these priorities. Roles and responsibilities need to be outlined (what to say, when to say it).

Sending a letter to the General Assembly outlining your organization's priorities is recommended at the start of the legislative session. For example, you could start by writing, "As the session begins, the _____ Association respectfully provides its thoughts on _____." This sets up a presence—the first step in participation in the process. Go and visit with targeted legislators. Timing is extremely important. Visit with legislators one-on-one, take them to breakfast or lunch with one of your groups. Give them a call.

Steps in Effective Lobbying

Ethics. It is most important, above all, to maintain high ethical standards in legislative lobbying. Never lie, stretch the truth, badger a legislator, or give false information. Win or lose, it is crucial the trust of legislators of your association is NEVER diminished or eliminated by unethical actions by an over-zealous member.

Get to know your legislators. Meet informally with your legislators and get to know them on a first-name basis. Nothing beats a good relationship between the association and the legislators.

Know legislation and act quickly. Become aware of legislation dealing

Do We Need a Professional Lobbyist?

Webster's definition of lobbying—"to conduct activities aimed at influencing public officials and esp. members of a legislative body on legislation."

Your association's board of directors has asked you to set up a public affairs program to lobby for your members. Where do you go from here? One of the issues is, do we use a staff person as our lobbyist, or do we hire a full or part-time professional lobbyist. The answer depends on a number of factors.

Objectives—to just get your issue "on the radar screen" you probably don't need a professional lobbyist. But, if your issue requires a person to push your issue and/or bill through the legislative process, and give you advice, you may want to hire a professional.

Capacity—can your association afford to have you and others out of the office for extended periods of time? Does someone on staff have the expertise? Would it be cheaper to hire a professional firm?

Financial resources—A very important question is: Can you afford the cost? Professionals are not cheap, but many lobbying firms may be willing to make flexible financial arrangements with associations.

Opposition—Is there any? If you are the lobbyist, you need to be sure you can withstand the pressure they might use.

How Do We Hire a Lobbyist?

It's the same as hiring your CPA, attorney or any other consultant.

Continued on page 4

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Play or Pay

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process. To me, it is really an admission of arrogant ignorance or stupidity.

One last thought. The governing process is dynamic, not static. Public policy changes as times change. Many different factors cause public policy to be modified or created. It can change when citizens see an abuse or a need for requiring a specific course of action that will affect their lives or the lives of others. Even the weather influences public policy. As a

dynamic process, it demands constant, ongoing participation. The very true statement, "The price of liberty is eternal vigilance" is one that associations and citizens should follow, for without it the governing process will go to those who will abuse it to the disadvantage of others.

As a nation, with a representative democracy and a Republic form of government, the governing process is not a spectator sport. To use the sports analogy, if you want to influence the game you have to be in the game. It is really quite simple to participate, if

you try. You are as close to any of your elected officials as your phone, fax or e-mail. It is not always easy or convenient to participate, but it can be accomplished in many ways, either individually or through organized groups. The key is to participate, sharing your knowledge and concerns. Your community, state and nation need your input, now more than ever. ♦

Paul Schauer is managing director, CRMCA/CRPA. He is a former Colorado State Representative and a current Regent at University of Colorado.

Effective Lobbying

Continued from page 3

with the priorities you have set. Spend some time learning about the proposed legislation but don't delay action. An issue may pass or fail without your input.

Be well informed.

Know the proposed legislation, pros and cons. Your association may be "for" a piece of legislation and know the pros of an issue, but it is extremely important to know the cons. Your members should be well versed to articulate sufficient information. The information presented to the legislator should be precise and concise including quantifying the impact of a proposed bill and how it affects your membership. Legislators are given tons of information and more is not best in this case—precise and concise works better.

Constant communication. Communicate regularly with your legislators, not only during the legislative session or when a crisis arises, on a year-round basis. Be persistent, but never threaten a legislator.

Build partnerships.

The more friendships are built with other associations, the better understood your association will be. From chambers of commerce, media, service clubs, community-wide organizations, all appreciate when you keep them informed as to your legislative agenda. Ask for their endorsement.

Thank you. Don't forget to thank the legislators. When they attend a breakfast with you, or support your efforts, a little special recognition such as a note or a phone call goes a long way. ♦

Tech Tip: Using AutoFilter in Excel

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.

This month's tip comes from Alan Browning, vice president of Management Advisors, Inc.

they are just temporarily hidden. To turn off AutoFilter, simply click *Data/Filter/AutoFilter* again.

One word of caution—if you forget you filtered one column, and then you filter another one, you won't see

all of the data you're expecting. Go back to the first filtered column and select the *All* option at the top. ♦

AutoFilter in Excel

Ever wished you could reduce or filter the amount of data you are looking at in an Excel spreadsheet? It's easy—simply select the first row of the spreadsheet and click on *Data/Filter/AutoFilter*. Magically, a set of drop-down arrows will appear in every column with data. By clicking on a drop-down arrow you will see every unique occurrence of data in that column.

For example, if you have a long list of members and you only want to see the ones in Illinois, simply select *IL* from the state column. Then, if you only want to see the company presidents in Illinois, click the arrow under job title and select *president*.

By selecting the *Custom* option under a drop-down arrow, you can get really creative with your filter. Play with this sometime, and don't worry, no data is being changed in the spreadsheet. All the rows are still there;

E-mail your technical questions to Tim Blum at timblum@rnel.org.

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dynamic process, it demands constant, ongoing participation. The very true statement, "The price of liberty is eternal vigilance" is one that associations and citizens should follow, for without it the governing process will go to those who will abuse it to the disadvantage of others.

As a nation, with a representative democracy and a Republic form of government, the governing process is not a spectator sport. To use the sports analogy, if you want to influence the game you have to be in the game. It is really quite simple to participate, if

you try. You are as close to any of your elected officials as your phone, fax or e-mail. It is not always easy or convenient to participate, but it can be accomplished in many ways, either individually or through organized groups. The key is to participate, sharing your knowledge and concerns. Your community, state and nation need your input, now more than ever. ♦

Paul Schauer is managing director, CRMCA/CRPA. He is a former Colorado State Representative and a current Regent at University of Colorado.

Effective Lobbying

Continued from page 3

with the priorities you have set. Spend some time learning about the proposed legislation but don't delay action. An issue may pass or fail without your input.

Be well informed.

Know the proposed legislation, pros and cons. Your association may be "for" a piece of legislation and know the pros of an issue, but it is extremely important to know the cons. Your members should be well versed to articulate sufficient information. The information presented to the legislator should be precise and concise including quantifying the impact of a proposed bill and how it affects your membership. Legislators are given tons of information and more is not best in this case—precise and concise works better.

Constant communication. Communicate regularly with your legislators, not only during the legislative session or when a crisis arises, on a year-round basis. Be persistent, but never threaten a legislator.

Build partnerships.

The more friendships are built with other associations, the better understood your association will be. From chambers of commerce, media, service clubs, community-wide organizations, all appreciate when you keep them informed as to your legislative agenda. Ask for their endorsement.

Thank you. Don't forget to thank the legislators. When they attend a breakfast with you, or support your efforts, a little special recognition such as a note or a phone call goes a long way. ♦

Tech Tip: Using AutoFilter in Excel

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@rmei.org.

This month's tip comes from Alan Browning, vice president of Management Advisors, Inc.

they are just temporarily hidden. To turn off AutoFilter, simply click *Data/Filter/AutoFilter* again.

One word of caution—if you forget you filtered one column, and then you filter another one, you won't see

all of the data you're expecting. Go back to the first filtered column and select the *All* option at the top. ♦

AutoFilter in Excel

Ever wished you could reduce or filter the amount of data you are looking at in an Excel spreadsheet? It's easy—simply select the first row of the spreadsheet and click on *Data/Filter/AutoFilter*. Magically, a set of drop-down arrows will appear in every column with data. By clicking on a drop-down arrow you will see every unique occurrence of data in that column.

For example, if you have a long list of members and you only want to see the ones in Illinois, simply select *IL* from the state column. Then, if you only want to see the company presidents in Illinois, click the arrow under job title and select *president*.

By selecting the *Custom* option under a drop-down arrow, you can get really creative with your filter. Play with this sometime, and don't worry, no data is being changed in the spreadsheet. All the rows are still there;

E-mail your technical questions to Tim Blum at timblum@rmei.org.

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Six Colorado Association Executives Earn ASAE's Prestigious CAE Designation

Six Colorado association executives from the Winter 2003 class join more than 3,200 industry leaders worldwide as Certified Association Executives (CAE), the designation from the American Society of Association Executives (ASAE). Successfully completing the CAE examination December 6, 2002 were:

- ◆ Caren Hunt, CAE, Executive Director, Colorado Association of Realtors
- ◆ Laura Landwirth, CAE, Executive Director, Colorado Association of Homes & Services for the Aging
- ◆ Beth A. Little, CAE, Executive Director, American Society of Bariatric Physicians
- ◆ Laura Raudonis, CAE, Admin Director, South Metro Denver Realtors Association
- ◆ Lori A. Ropa, CAE, Senior Membership Marketing Manager, American Water Works Association Headquarters Office
- ◆ Dawn E. Vinson, CAE, Executive Director, Liaison Council on Certification

for the Surgical Technologist.

Since inception in 1960, the CAE designation has been conferred upon executives who demonstrate high levels of association management knowledge, ethics, and leadership. Prior to certification, applicants are rated on their experience and accomplishments in the association management profession and must successfully complete the comprehensive exam.

The next round of CAE examinations will be administered nationwide on May 6, 2003. ◆

Congratulations CAEs!



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Members Speak Out: Colorado Associations Provide Community Services

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

Helga Grunerud, Hispanic Contractors of Colorado—Hispanic Contractors of Colorado has just formed a partnership with DPS Kepner Middle School. This school has a predominantly Hispanic, low-income student population. The association is working with one of their teachers who is a Colorado MESA advisor (Math, Engineering, Science Achievement) to identify students who might be interested in professional construction careers. In addition, they are interacting with students who would prefer to study a trade in construction.

On-the-job injuries in construction are very high among the Spanish-speaking workers. Therefore, the construction industry desperately needs bilingual professionals and tradespeople. These students, who already speak both languages, can combine that skill with training and have excellent job prospects. By giving students an opportunity to visit construction companies/sites and speak with individuals in the industry, HCC hopes they will choose a career in construction.

Ann Cairns, Geological Society of America—The Geological Society of America, headquartered in Boulder, has recently supported Bonfils with blood drives and the Community Food Share with food drives.

Anne Marie Smith, Pikes Peak Association of REALTORS—In December of 2002, PPAR participated in Kids Crossing, a program that collects toys for children in Foster Care; Care and Share, a program that collects funds for food for the needy in the Pikes Peak region; and The Salvation Army, donating hours of time to bell ringing at the local mall during the holiday season.

PPAR is also involved with the Laurel Manor Nursing Home and is beginning a campaign to collect donations for domestic violence victims in their area. ♦

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

CSAE Public Policy Committee

The past year has been a very busy one for members of CSAE's Public Policy Committee. Beginning with a Legislative Education Program Series in December 2001, topics such as "Lobbying and the IRS," "Working with Lobbying Professionals" and "Fair Campaign Practice Act" were presented. The second of the two-day program saw Donetta Davidson (Colorado Secretary of State) and Matthew Garth (political consultant) as the featured speakers on legal requirements and grassroots campaign efforts.

The committee's Public Policy Series are breakfast sessions with specific topics relevant to all association members. A Series Event was held each month from January to May 2002. Speakers ranged from Senator John Andrews who discussed issues facing the Colorado General Assembly in 2002, to Bill Kirven, then Colorado

Insurance Commissioner, who spoke on the issue of rising healthcare costs, a topic that strikes a nerve among most associations and their members. The March breakfast saw Mike Hodges, representing trial lawyers, and Bill Imig, representing the auto insurance industry, discussing Colorado's auto insurance system. This was followed by Bob Lee's presentation on Colorado tourism and economic development for the state. Our final program centered on working with government on your associations' issues and was presented by Peter Meersman (Colorado Restaurant Association) and Micki Hackenberger (Hays, Hays & Wilson).

A very successful end-of-legislative session reception was held by CSAE in space provided by Tim Jackson and NFIB. CSAE members had the opportunity to mingle with legislators and voice concerns in a favorable setting. The committee plans to host a similar event this April.

Following the summer hiatus, the next committee effort to inform and educate associations took place at the November luncheon, where Paul Schauer (Colorado Ready Mixed Concrete Association/CU Board of Regents) and Peter Meersman (Colorado Restaurant Association) discussed election results and their relevance for CSAE members. Tim Jackson acted as moderator.

January 2003 kicked off the new Public Policy Series with a breakfast where top state expert Mark Grueskin, a partner at Isaacson, Rosenbaum & Levy, discussed his experience on election and campaign law and challenging ballot initiatives. Two more Policy Series events are planned; one to hear from a prominent political pollster recapping Election 2002 and a final Series event on the popular subject of health care.

Sign up for the Policy Series at csaenet.org, it will be worthwhile for you and your association. ♦

Describe all the regulations monitored and influenced by the association or chamber to create a legislative audit compliance. The checklist format serves as a practical guide to conformance.

Regulatory Audit Service—Expand the value of the legislative audit checklist by employing staff to visit with members who want help in understanding and complying with the laws influenced by the association. One great value of the audit service is that the association has an engaging relationship with members wanting help. A second advantage is the collection of data about compliance problems that will result in better lobbying.

To protect your lobbying program as a member benefit, consider ways to transform information into tangibles. Let non-members access the information at reasonable fees. ♦

Bob Harris, CAE wrote How to Influence Florida Government and focuses on effective association operations and leadership development. He can be contacted at bob@RCHCAE.com or 850-570-6000.

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You'll Lobby for Me Whether or Not I Join!

by Bob Harris, CAE

Non-members benefit from lobbying—maybe you call them “freeloaders.” I call it the “legislative welfare” program. We respond to their objections with rationale like: “your membership allows access to influence the process,” or, “your participation increases our clout.” The fact is, successful lobbying benefits everyone, not only dues paying members.

Solving the Dilemma

The issue is how to make lobbying a member benefit and an activity respected by

prospects and members alike. Do this by transforming lobbying efforts and results into tangibles. A tangible benefit is one you can publish, sell, share, distribute and control. It positions the organization as a leader by managing and controlling the information.

Try these ideas to transform lobbying into tangible benefits:

Compliance Manual—

When a law is enacted, create a compliance manual that describes how the law came about, the exact wording, definitions, how to comply

and where to go for help. Every law has a history and there is plenty of content to create a manual.

End of Session Report—

A summary of the legislative session is valued by members and retained for reference. It summarizes the organization’s platform, efforts and results.

Legislative Directory—

Create a legislative directory with contact information and committees of interest. Or, adapt an existing directory by imprinting the cover or inserting several center pages describing the organization’s

issues or key bills. A legislative directory is an excellent member benefit and sellable to non-members.

Legislative Platform—

The organization or lobbyist determines a legislative agenda for the upcoming session. Prepare the legislative platform in a brochure to inform members of issues and goals.

Legislative Audit Checklist—

Most businesses comply with regulations enforced by multiple agencies. For example, a restaurant complies with licensing, smoking, safety, taxation, and labor laws, at a minimum.

Its 9:00 A.M., Do You Know Who Your Legislators Are?

by Corky Kyle, CAE, President, The Kyle Group

That’s right, its 9:00 a.m., a weekday...do you know where your legislators are? You will find them on the floor of their respective houses conducting the business of the Senate and the House. They are acting on issues that affect each and every one of our lives, businesses and associations.

Have you taken time to know who your legislators are? Do they know who you are and the association you represent? Do they know what your association stands for and who your members are? If your answer is no to these questions, it’s time for

you to get to know the two most important people in your business life.

Whether we like it or not the political process is an integral part of our lives. The 100 legislators that meet in the Capitol from January, 2003 through May 7, 2003 will review and act on 700+ individual pieces of legislation that will affect the way in which your members conduct their business, or manage their non-profit activities.

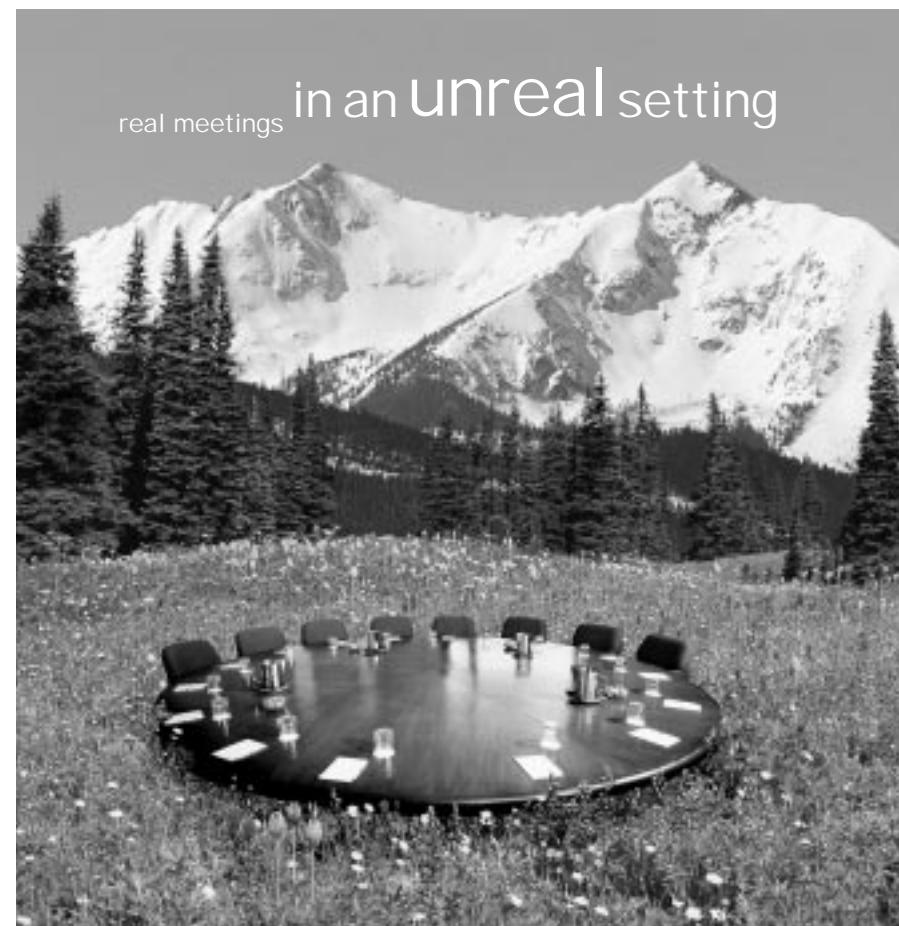
Given the parameters of this process you will want to become involved. The best way to become involved, is

by building a relationship with your state representative and state senator. Don’t know who your legislative representatives are; call your county clerk or go on line to www.vote-smart.org. Either way you will get the information you need.

After learning who your legislators are, call them up, introduce yourself, ask them to visit your association and learn about what you do. Begin inviting them to your association’s functions. Immerse them in materials and activities. Ask them to let you be their resource for issues affecting your legislation.

Building relationships takes time. But by taking these first few steps you will be well on your way to building a relationship that will last a very long time. One that will become valuable to you and your association over time. And when someone asks you, “do you know who your legislators are?” you can look them in the eye and say “You bet I do!” ♦

Corky Kyle, CAE, is president of The Kyle Group, LLC, public and government affairs advocates. He can be reached at 303-302-1109 or e-mail at ckyle@thekylegroup.com.



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Chapter Series: Liability and Other Fun Legal Stuff

by Mark Grace, American Waterworks Association

For those of you who read my last article on chapters, you will remember that my daughter had asked a question about what it is I do. As I had done earlier with my daughter, my last article talked briefly about what chapters are and their advantages and disadvantages. Her eyes have long since glazed over and she is off watching the Disney channel or listening to Britney Spears or something. And it is just as well because we are going to talk about liability and other legal considerations a bit in this article, and I don't need to hear her whining that this is way more than she wanted to know—I get a lot of that!

Let's talk first a bit about liability. As is true with any other part of your organization, chapters bring with them the potential for legal problems. That could include

suits or threatened suits in areas such as personal injury, employment, anti-trust, copyright infringement, defamation, or anything else for which the parent organization might be sued. There are limits to how much you can isolate the parent from liability resulting from the chapter (remember, you are the relatively deep pocket), but there are things that can be done.

In general, for the purpose of limiting liability, you are looking for separation between the two organizations. Incorporating each chapter creates a separate legal entity and gives you your first line of defense. However, that in many cases will not be enough. You will also need to look at how much control you exert over the operations of the chapter. For the purposes of limiting liability, less control is better, though it may not be better

when other operational considerations are factored in. Other dependencies will also be factored in. Does the chapter rely on the parent for funding? Does the chapter rely on the parent for legal advice, insurance, tax support, HR functions, and...you get the idea. What to require and how much to require out of chapters is an operational decision, and it must be balanced with concerns about limiting liability.

I can recommend two things on the liability front that are good in all cases. First is insurance. You should make sure that you and your chapters have good coverage for directors and officers and general liability and any other coverage that your organization's work would recommend. Second, train your chapters in how to limit liability or, said another way, how to operate soundly.

Other Legal Issues

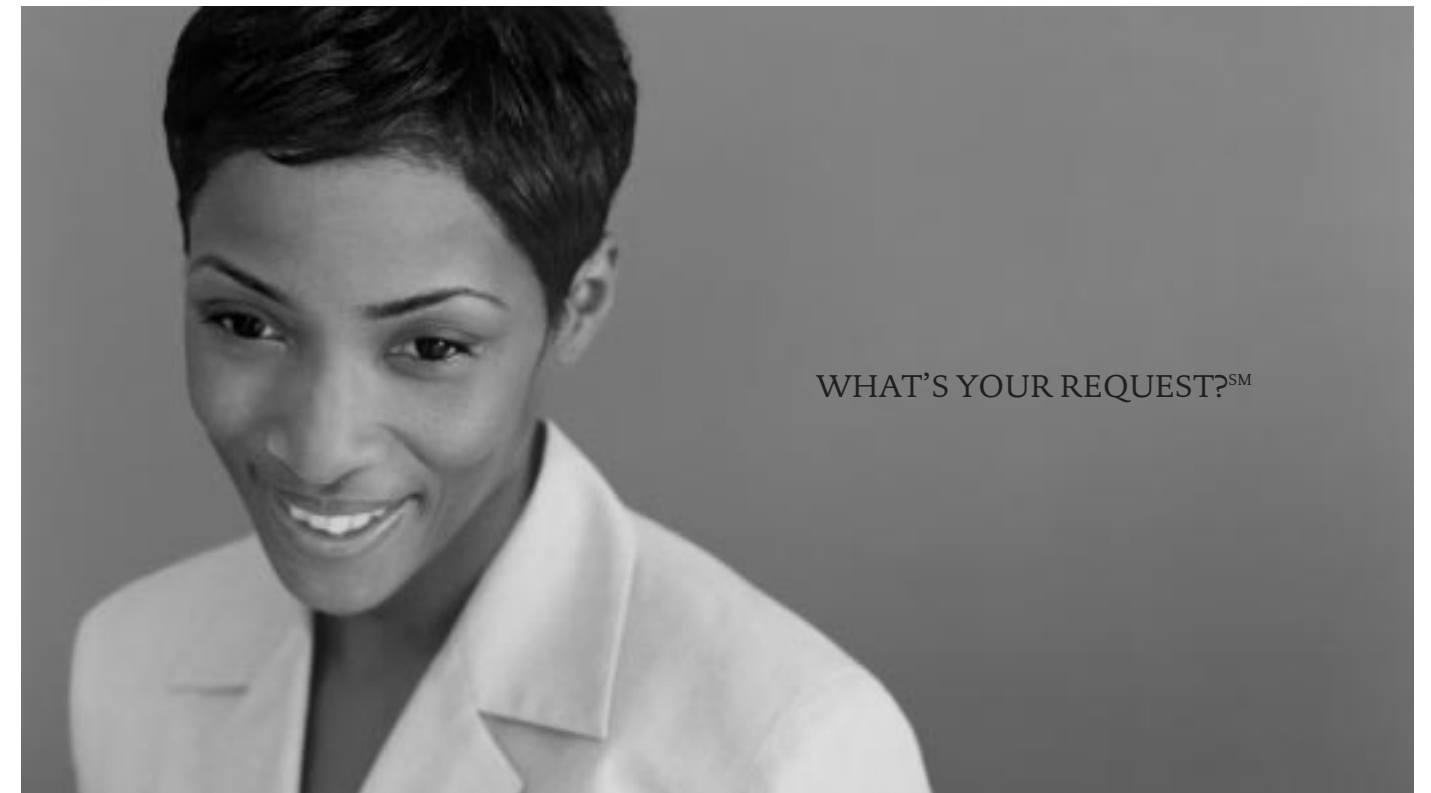
So now that we are done with the liability stuff (don't persuade yourself that you'll ever be done with liability stuff), there are a few other things I want to mention regarding legal issues. Non-profit status: this can be obtained separately by each of your chapters or you can apply to the IRS for a group exemption that extends your exemption to your chapters. This requires some minor annual reporting to IRS, but it is not onerous. Taxes: you can file for your chapters, treating them as part of the financial structure of the organization or you can have them get a federal employer identification number and have them file separately. Make sure they file if they meet the minimum income standards.

I have only scratched the surface on the legal stuff. And now to protect myself against liability, please do not rely solely on this article for information on any of the issues it discusses. I am not a lawyer, I just have talked to a lot of them and am beginning to sound like one. I hope your eyes have not glazed over—now go get some aspirin! ♦

Mark L. Grace is manager of Section Services at American Water Works Association. He can be reached at 303-347-6193 or e-mail mgrace@awwa.org.



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