



Executive Memo

Summer 2004

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Facing the Facts About Faxes

(as of July 22, 2004)

by *Adrienne O. McNamara, Dirk W. de Roos, Natalie Hanlon-Leh, Jennifer K. Harrison and Steven D. Zansberg, Faegre & Benson LLP*

The lifeblood of most associations is a network of positive relationships with members. In today's busy association world, e-mail and facsimile transmittals may be a principal means of facilitating the good communication which is so important to maintaining these relationships. Accordingly, recent federal and state laws regulating the transmission of facsimile messages mean that associations will have to understand and comply with these laws in their fax communications with members and others. To protect their organizations from suits and fines, as well as possible alienation of members, associations need to face the facts about faxing.

Federal Law

Federal law prohibits sending "unsolicited advertisements" by fax. The law defines "unsolicited advertisement" as "any material advertising the commercial availability or quality of any property, goods, or services which is transmitted to any person without that person's prior express invitation or permission."

Until January 1, 2005, federal law allows businesses or associations to send faxes to persons with whom the business has an "established business relationship." Effective January 1, 2005, the FCC has revised the applicable regulations to eliminate the established business relationship exception for faxes and to require anyone sending a fax advertisement to obtain prior written invitation or permission from the fax recipient, even when a business relationship has been established. A new FCC rule states that an "advertisement is not 'unsolicited' if the recipient has granted the sender prior express invitation or permission to deliver the advertisement, as evidenced by a signed, written statement

that includes the facsimile number to which any advertisements may be sent and clearly indicates the recipient's consent to receive such facsimile advertisements from the sender." 47 C.F.R. § 64.1200(a)(3)(i) (effective Jan. 1, 2005). According to the FCC's commentary on the new rule, the permission to send a fax cannot be in the form of a negative option. A facsimile advertisement which contains a telephone number and an instruction to call if the recipient no longer wants to receive faxes would constitute a "negative option."

Bills have been introduced in both the United States Senate and House of Representatives that would allow businesses to continue to rely on an established business relationship rather than seeking express permission prior to faxing. As of the date of this article, however, these bills have not been enacted into law. Therefore, the safest course of action is to acquire express, written, signed permission from potential fax recipients. Moreover, even if the federal law is revised, Colorado state law will still apply (*see page 3*).

Federal rules prohibit the sending of any fax (whether an advertisement is included or not) unless the fax includes either in the top or bottom margin of each page or on the first page of the fax the following information: (1) the date and time of the fax transmission; (2) an identification of the business, entity, or individual sending the fax; and (3) the telephone number of either the sending machine or the business, entity, or individual that is sending that fax.

Violations of federal law can result in an action by either the recipient of the fax or the state to recover the greater of either the actual monetary

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Executive Memo

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President's Message

Investing in CSAE's Future

—by *Sam Albrecht, CAE, CSAE President*

Well, here it is—my first column as president. I certainly want to thank Raquel Alexander for all her hard work. She left big shoes to fill and it will be nice to have her around to keep me straight.

JT has been keeping me busy. Sometimes I think it's to make me feel like I'm running the show, but I know better. I realize that I'm only at the helm for a short time and look forward to the coming year.

I've been asked what I want to accomplish during "my year." I really don't think of it that way. I think of it as "our" year, and working with the fine board, staff and volunteers we have is going to be great. With that said, I can share a few areas which I would like CSAE to explore.

First, I think that we can continue the marketing and branding effort that is underway. It has a good foundation and we can add to that. Second, I would like to keep CSAE thinking strategically. How can we better serve our members and our industry? What's coming down the road that we need to think about now?

Third, I'd like to think that we could tweak the governance and structure of CSAE to be more

effective. This world we live in changes fast and we need to be able to react just as fast. Opportunities and threats need to be quickly analyzed, with a response developed and implemented in as short a time as possible.

Finally, I would hope that CSAE can invest resources back into the organization. To me, resources mean time and money. Most successful businesses hold back some profit in order to invest back into the company. Why is that so hard for nonprofits? As a personal example, it has been a struggle in the organizations that I've worked for, to not spend every available dollar on "programs."

So, that's what I'd like to see, and I'll close by inviting each of you to help me and the rest of the board this coming year. Watch us and let us know if you think we're doing a good or bad job. We are working toward helping you and CSAE move forward.

*Sam Albrecht, CAE
CSAE President*

Why CSAE?

Creating networking opportunities

Serving educational needs

Advancing your profession

Enhancing the community

Your career deserves it

Facts About Faxes

Continued from page 1

loss that results from the unsolicited fax or \$500 per violation. If the court finds that the sender's violation was willful or knowing, the court may award triple damages.

Colorado State Law [Note: The following information describes the new version of the Colorado law, which is effective August 4, 2004.] Colorado state law includes three components:

First, the state law—like its federal counterpart—prohibits sending “unsolicited advertisements” by fax, and defines “unsolicited advertisement” in substantially the same manner as the federal law.

Second, the state law—like its federal counterpart—prohibits sending any fax (even those faxes that do not include advertisements), unless the fax includes substantially the same information required by the federal law. The state law, however, unlike its federal counterpart, requires inclusion of the number of the sending fax machine, rather than providing the option of including either the sender's telephone number or the sender's fax machine number.

Third, the state law also makes any violation of the federal fax laws a violation of state law.

In some ways, Colorado's state law may be broader than its federal counterpart, since the exception for established business relationships currently in the federal rules is absent from the first two components of the state law. Accordingly, “prior express invitation or permission”—even from those with whom the sender has an established business relationship—is required by the first component of the state law.

A recipient of a fax in violation of Colorado law can sue the sender for money damages which may be the greater of actual damages suffered or \$500. If the suit is successful, the sender may also be required to pay the recipient for the cost of bringing suit, including the recipient's attorneys' fees. Triple the amount of actual damages may be awarded if the recipient can establish that the sender of the fax acted in bad faith.

Violations of state law authorize the Attorney General or District Attorney to

seek civil fines up to \$2,000 per violation, in addition to the damages awarded in a suit by the recipient of the fax. If the violation is committed against an elderly person, the sender of the fax may be fined up to \$10,000 per violation.

Reduce Your Exposure

A conservative, but prudent, approach to protecting your organization from liability has several elements. Below are some suggestions to help limit liability exposure:

- ✦ Obtain written and signed permission before sending the fax. Be sure that the permission statement is broad enough to include all of the recipient's fax numbers to which you may fax.
- ✦ For organizations with members, consider including in the membership application or other agreements a clear statement indicating that, by providing a fax number and his or her signature, the member agrees to receive facsimile advertisements from the organization.
- ✦ If the persons you will be faxing are the association's members, consider including a provision in the permission statement providing that the permission to send faxes stays intact for a limited time period after membership ends for any reason.
- ✦ Develop a procedure to ensure that faxes are not sent to anyone who has requested not to be faxed.
- ✦ Ensure that either your fax machine or your fax cover sheets (or both) include the date and time of the fax transmission, the name of your organization, and the telephone number of the transmitting machine and of the sender of the fax.
- ✦ Consider including in each fax a statement to the effect that the fax is sent based on the recipient's permission, and if the recipient does not wish to receive future faxes, he/she should let the organization know and it will remove such person from the fax list.
- ✦ Consider the impact of the laws of other states into which fax advertisements are being sent as such laws will vary. At least 29 states have laws governing the transmission of faxes.

Helpful Web Sites

For a sampling of web sites on the topic of fax laws, visit the following sites:

- ✦ www.keytlaw.com
- ✦ www.consumerwatchdog.org
- ✦ www.junkfaxes.org
- ✦ www.stopjunkcalls.com

Understand that even with signed, written permission, there are still some risks involved with faxing advertisements.

It Could Happen to You!

An aggressive cottage industry has developed in response to fax laws. There are companies and web sites that are now in business to gather unsolicited faxes and bring suit against senders, seeking an award of money under the new laws. Some web sites even provide sample letters and pleadings, advising fax recipients how to prosecute legal actions under the fax laws (*see sidebar*). Some businesses have paid large sums of money as a result of class action fax law claims. For example, judgment has been entered against Hooters of Augusta for nearly \$12 million dollars as a result of fax law claims. ✦

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The information in this article is informational only and is not intended as legal advice. Keep in mind that the information in this article is based on the federal law, as currently scheduled to go into effect January 1, 2005 and the applicable commentary by the Federal Communications Commission, as well as the Colorado law which is in effect as of August 4, 2004. This information could change if pending legislation is enacted or in the event of other regulatory developments.

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A Question to Nonprofit Management: Do We Need a New Sense of Organization Ownership?

by Rene Moquin, President, Dialogos Consulting

There appears to be a growing sense that the number of managerial-related issues among nonprofit organizations has increased both in size and complexity. These issues include the lack of board governance, the inability to create a team environment, and a general lack of ownership in the vision and mission of the organization.

Many employees, volunteers and board members still feel that they are unable to influence decisions affecting their association. Although experience illustrates that people who are involved in addressing concerns important to them can make a difference, there is a growing sense of distrust and feeling that one's involvement may not have any impact in an organization's overall long term success.

Could it be the reason things seem to be getting worse instead of better is because of us and not despite us? Has the cumulative effect of providing more and more perks and benefits to employees and volunteers caused them to resent us more than appreciate us? Have we helped create the very lack of distrust and disempowerment that we were hoping to prevent?

While we may be offended by these questions, we must face this dilemma squarely. All of us in leadership roles are associated with systems. We control inputs in order to maximize outputs. Without us, staff does not receive the compensation and benefits they desire nor do volunteers receive recognition for services rendered. Conversely, we're beginning to understand that we cannot be successful in addressing these concerns for those who are not committed to assuming ownership in our overall success.

What does it take to get employees to assume ownership for an organization, to truly take personal responsibility for its success? Kevin and Jackie Freiberg, in their best selling book, *Nuts*, stress that ownership is a powerful catalyst for organizational change. Owners think differently than nonowners because ownership is a state of mind.

Employees must believe that they can make a difference. Ownership allows employees to bring

their ideas, skills and talents to the table and feel they are involved. There is a greater likelihood that employees will do the right thing if they are clear about the association's purpose and strategies, its mission, vision, values and philosophy. In fact, they should be involved in defining those guiding principles.

There is a need for new approaches in creating organization ownership by all the stakeholders (staff, management, volunteers and customers). Organizations must encompass stronger connections between employees and supervisors, management and boards as well as with outside constituencies to be successful in achieving their visions.

We must create a climate that values the capacity for all employees and volunteers to become involved in positioning the organization for the future and in solving their own problems. Healthy associations cannot prosper without pro-

Employees must believe that they can make a difference. Ownership allows employees to bring their ideas, skills and talents to the table and feel they are involved.

viding opportunities for all their employees and volunteers. If each organization can recommit itself to supporting each other in pursuing a "shared vision," each organization can become shining beacons and reflect "a new sense of ownership." ♦

Rene Moquin, president of Dialogos Consulting, has worked with a number of associations in creating an interactive strategic planning process that captures and exploits the foresight that can exist throughout an organization. Rene can be reached at P.O. Box 4303, Estes Park, Colorado, 80517. Telephone: 970-586-3905. E-mail: renemoquin@charter.net

A Day in the Life of an Association Exec

by Marilee Yorchak, CAE, Business Marketing Association-Colorado

How many times have you tried to explain to someone just what it is that you do as an association executive? The “thirty-second elevator speech” works for cocktail parties, but sometimes people want to know more.

Someone suggested to me once that I should keep a “journal” of just what it was that I did in a day. After all, that same person reasoned...couldn’t you use that to justify a raise to your board? (I’ll let you stop and rest while you recover from laughing your head off.)

So, in the interest of telling someone just what my day is like, here’s a brief recap of a typical day!

8:30 AM Arrive in office, cheery and humming “What a Beautiful Morning.” Discover coffee maker is broke. Decide I don’t need the caffeine buzz anyway.

8:45 AM Download e-mail. See that there are over 200 emails, and, unfortunately, only about 50 of them deal with something that can be deleted easily...Viagra, Swiss Bank accounts, etc. That leaves 150 e-mails that need attention, from “What’s my member number again for the web site?” to “I need a job” to “Need you to proof the newsletter.”

9:30 AM While finishing up e-mail, the association’s golf tournament chair calls. The good news is that after looking for a job for six months, she got a new job! The bad news is that she starts next Monday and the job is in Philadelphia. That means she is dropping everything to move, including her commitment to get sponsors and door prizes and to finish the creative on the mailer. Guess who gets to finish it up?

10:30 AM Review new fax regulations for associations. Decide it is important enough info to distribute to the board, and ask board member with expertise in this area to write an article for the next newsletter, due in three weeks. Board member says, “You need it when?”

11:00 AM Listen to voicemail. Patiently return five calls from hotel/resort properties asking about when we can meet to discuss our meetings and conferences.

11:30 AM Get a call from the mail house. The mail piece for the upcoming event is oversize (requiring extra postage) and the donated paper is coated...a no-no for ink-jetting the addresses on. Repeat my mantra in getting donated services...*A beggar cannot be a chooser...A beggar cannot be a chooser...*

Noon Decide to eat lunch at my desk. Read my fifth-grade daughter’s essay on “What My Parents Do.” Discover that my husband is practically in charge of the

3:00 PM Take a break and pick up my daughter from school. Get a needed and appreciated hug and hear all about the going-ons at recess today...making my daily disasters seem inconsequential.

3:30 PM Return phone calls while daughter starts homework. Have the privilege of welcoming two new members. Call three others to remind them that their renewal payment is due this month.

4:00 PM Update web site (seemingly a daily occurrence)

4:30 PM Speaker for this month’s educational program calls and states he needs a larger-

Note:** Everything written here **truly** did happen to me as an association executive...but luckily not all in **one day**...just in **one week!

world, while my daughter says, “My mom talks on the phone all day and goes to meetings.”

1:00 PM Jump up and down in the office...I just landed the big sponsor for next year!

1:15 PM JT calls from CSAE. We have a board meeting next week, a committee meeting this week and she needs a pro bono copywriter to help write something that will bring in 50 attendees to an education session...by today.

2:00 PM Meeting with president to review membership goals and strategies for remainder of year. Look at budget and watch president throw up his hands and say, “That’s your job...I have to go to another meeting, but I *know* you can do it! That MBA of yours has to be worth *something!*”

than-life screen for his presentation, and by the way, why is his photo so *small* on our web site? He needs the promotion after all!

5:00 PM Hang up the executive director hat for the day, not humming, but wondering where that bottle of wine is...until...

10:00 PM Read latest issue of CSAE *Executive Memo* and ASAE’s *Association Management*, hearing all about what other association execs do...and fall asleep on the pillow with the reading material smashed up against my face! ✦

Marilee Yorchak, CAE, is executive director of Business Marketing Association-Colorado. She can be reached at 303-986-7611 or by e-mail at marilee@bmacolorado.org.

Mind Boggling

Here are some of the U.S. statistics for 1904:

- ✦ The average life expectancy in the U.S. was 47 years
- ✦ Only 14 percent of the homes in the U.S. had a bathtub
- ✦ Only eight percent of the homes had a telephone
- ✦ A three-minute call from Denver to New York City cost eleven dollars
- ✦ There were only 8,000 cars in the U.S. and only 144 miles of paved roads
- ✦ The maximum speed limit in most cities was 10 mph
- ✦ Alabama, Mississippi, Iowa and Tennessee were each more heavily populated than California. With a mere 1.4 million residents, California was only the 21st most populous state in the Union
- ✦ The tallest structure in the world was the Eiffel Tower
- ✦ The average wage in the U.S. was 22 cents an hour
- ✦ The average U.S. worker made between \$200 and \$400 per year
- ✦ A competent accountant could expect to earn \$2000 per year, a dentist \$2,500 per year, a veterinarian between \$1,500 and \$4,000 per year and a mechanical engineer about \$5,000 per year
- ✦ More than 95 percent of all births in the U.S. took place at home
- ✦ Ninety percent of all U.S. physicians had no college education. Instead, they attended medical schools, many of which were condemned in the press and by the government as “substandard”
- ✦ Sugar cost four cents a pound
- ✦ Eggs were fourteen cents a dozen
- ✦ Coffee was fifteen cents a pound
- ✦ Most women only washed their hair once a month and used borax or egg yolks for shampoo

Project Association Member Value

by Ed Rigsbee, CSP, Author and Speaker

Does a professional or trade association exist to serve its members, to serve the profession or industry, or does it exist to perpetuate itself? Sure, your answer is based on your experiences. Unfortunately though, I have come to believe that there are simply too many people involved in association leadership today that believe in the latter. Many of these leaders do not consciously realize that they do believe that the reason for an association is to perpetuate itself. Yet, their actions in this area speak so loudly that few listen to their patter.

I recently visited the web site of the American Association of Association Executives and searched “member value” but what I found was more directed to the organizational side. My lack of finding information specific to “member value” strengthens my assertion. Sure I found great information on subjects like: “identifying program goals and setting realistic expectations,” “identifying and defining the needs of the target audience,” “developing program structure,” “building a budget” and “cross-selling and up-selling additional programs and services.”

While these topics are all great tactics, what about the overarching strategy for an association? What about quantifying the real dollar value a member receives from holding membership in an association? This is an area that I have discovered many association leaders are missing the point. There are a few people left that join their trade or professional association because it is the right thing to do in supporting their industry. But, as corporate belt tightening continues, many are re-evaluating the value of such memberships.

Call me crazy, but I believe that a professional or trade association exists exclusively for the betterment of its members. Associations like these are really industry-wide strategic alliances. And, for strategic alliances to succeed, all involved must receive reasonable value for resource (time and money) commitment to the alliance. In associations, staff members receive value (it’s called a paycheck). Volunteer leaders receive value

through exposure and having the ability to forward their particular agendas. But, what about the “rank and file” members—where’s their value?

Over the past several months, I have conducted my *Association Member Value Process* for a number of trade associations and societies of association executives. The results might be helpful to you in benchmarking the value your association delivers to its members. Here’s what I discovered:

- ✦ On the average, association executives received 19X return on investment dollar from their membership.
- ✦ Average yearly membership and meeting participation cost = \$914.
- ✦ The average yearly real-dollar value received = \$17,390.

This year, in visiting the national conventions of four trade associations from February through May 2004 and conducting the member value process, I found:

- ✦ The average yearly member return on investment was 12 X.
- ✦ The average yearly membership and meeting participation cost = \$2,250.
- ✦ The average yearly real-dollar value received = \$27,800.

Association paid staff and volunteer leaders must continually question the yearly sustainable real-dollar value their members are receiving rather than just see members as an ATM (automatic teller machine). Without the members, there is no association. ✦

Ed Rigsbee, CSP, is the author of PartnerShift, Developing Strategic Alliances and The Art of Partnering. Rigsbee has over 1,000 published articles to his credit and is a regular keynote presenter at corporate and trade association conferences across North America. He can be reached at 800-839-1520 or by e-mail at ed@rigsbee.com. Please visit www.rigsbee.com/ma26.htm to read about Rigsbee’s Association Member Value Process.

CSAE's Career Center Open for Business

CSAE's new *Career Center* is open for business with at least 150 industry-specific job listings for candidate viewing and over 6,000 searchable resumes for job posting employer access. Go to the *Career Center* at www.csaenet.org

Jobs posted on the *CSAE Career Center* will automatically be listed on ASAE's established Career Headquarters web site and another 30 SAE web sites nationwide. The result will be advertising exposure to the largest industry talent pool available!

This week alone there are eight new listings for positions in Colorado associations. These include:

- ✦ Executive director
- ✦ Director, coordinator and supervisor positions
- ✦ Bookkeeper
- ✦ Administrative assistant

To advertise career opportunities and gain access to resume-searching features, employers pay a member or nonmember 30-day job posting fee. Jobs can be listed locally—or nationally for maximum exposure.

All services are free to job seekers, which include resume posting, online job application capability, search agents and private online personal accounts.

The *CSAE Career Center* will focus on all positions that relate to association and nonprofit organizational staffing needs, including:

- ✦ Chief executives
- ✦ Directors
- ✦ Managers
- ✦ Administrators
- ✦ Part-time employees
- ✦ Interns

ASAE President and CEO John H. Graham IV stated, "We expect the *CSAE Career Center* to be an extremely successful partner in the *ASAE Career Headquarters Network*. With its strong reputation in the association and nonprofit organization industry,

CSAE is the logical place for employers to connect with a highly qualified and targeted pool of professionals in Colorado." ✦

For more information about the *CSAE Career Center*, visit www.csaenet.org

COPPER CONFERENCE CENTER

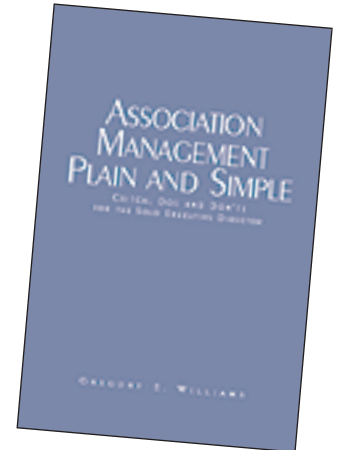
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Book Review: Association Management Plain and Simple: Critical Dos and Don'ts for the Solo Executive Director

reviewed by Mo Goldman, ConferenceDirect



Association Management Plain and Simple is a newly published book by seasoned association executive Gregory Williams. It is designed for the busy executive in a one- or two-person office. Robert C. Harris, CAE, principal of the Tallahassee, Florida, based Harris Management Group says, "Nice work! Clean, easy to read, helpful lists."

Williams points out that the American Society of Association Executives estimates there are over 147,000 trade and professional associations in America, and as many as 1,000 such new groups form each year. With today's technology, one or two people can run an association with 500 to 1,000 individual members, and that association can have a huge effect on public policy and the environment in which the members work and do business.

This book is a succinct compilation of

nearly 750 fundamental dos and don'ts in 11 chapters for the busy executive. It is presented in list format and is quick and easy to read. Instead of filling the covers with 750 pages of anecdotes, war stories and footnotes, Williams says he chose to keep it short and crisp—it is just under 75 pages long—so that it will reach and be retained by the target audience—busy association executives.

According to Williams, "It took about two years to assemble and refine the materials in the book but it only takes about two minutes at the beginning of a work day to begin breaking rules and taking short cuts that will cost time, energy and money to fix later."

Greg Walcher, former president and CEO of Club 20 (a Colorado organization chiefly of businesses and local governments) says, "It's great! Common sense points that most managers simply don't think about until it's too late

and they've already made dumb mistakes. It's organized well, easily readable, funny in a few key places and extremely useful."

Sample key points include: "Do no harm (from Peter Drucker). Do find and cultivate a sponsor on the board. Do give yourself time to think, organize, and plan. Have a "lockdown" day without phone work and e-mail. Don't postpone educational and professional development activities because you are too busy. Do remember a project not agreed to by the board is just a wish. Do link your budget line items to your work program, which should also be linked to your strategic plan. Don't allow the work program to develop by happenstance."

Greg Williams has been working in policy, politics and program management (the three P's of association management) for over 20 years. He has worked in large and small associations and has made most of the mistakes in this book at least once. He received his undergraduate degree from the University of Northern Colorado and a Master of Business Administration from the University of Colorado.

Copies of the book can be obtained for \$8.50 plus postage and handling from Xlibris Corporation at www.xlibris.com or by calling 1-888-795-4274. The book also can be purchased at Armazem Bookstore and Cafe, 3215 E. Colfax (between Adams & Steele), Tattered Cover or it can be ordered from the reference desk at any large bookstore. Also, the CSAE library has a copy available for check out. ✦

Network for the Needy: Help Stomp Out Hunger!

Plan to attend the 11th Annual Network for the Needy Luncheon on November 11, 2004

Network for the Needy began in 1994 when hospitality organizations decided to work together toward a common cause: ending hunger in our community. In Denver, 27 percent of children live in poverty and are at risk of hunger.

- **When:** November 11, 2004
- **Time:** 12:00 p.m. to 1:30 pm
- **Where:** Marriott Tech Center 4900 S Syracuse St, Denver, CO 80202
- **Hosted by:** Ed Green, Channel 4 News
- **Cost:** Individual \$40 (after 10/29/04 \$45)
Table \$350 (after 10/29/04 \$400)
Vendor Table \$250 (limit one)
- **To register go to:** www.mic-colorado.org

All proceeds benefit Denver's Table and Food Bank of the Rockies!

Maureen "Mo" Goldman is a national account manager at ConferenceDirect. She can be reached at 720-334-1905 or by e-mail at mo_goldman@conferencedirect.com.

Applied Futurism: Putting Trends to Work Today

by Susan J. Ellis, President, Energize, Inc.

Do you watch the national and world news and shake your head? Do you wonder if global and regional developments will end up affecting the volunteer program you run? You should. Volunteering never occurs in a vacuum, and so all the social, economic and cultural trends affecting many citizens will clearly affect many volunteers.

Sometimes current events provide opportunities to grab what's new or "hot"; other times they will set off warning bells to help you avoid negative impact. You can strengthen your volunteer program by becoming an effective forecaster, making sure you seize great trends while sidestepping the bad.

Why Is Forecasting Necessary?

First, keep in mind that futurists refer to what's-to-come in plural terms. They talk about futures, since at any given time there are an infinite number of paths we can take. In fact, they consider three different types of futures:

- ✦ *Possible* futures, which include anything and everything within the laws of the universe as known today, from utopian scenarios to hellish nightmares.
- ✦ *Probable* futures, which are a central slice of possible futures, but represent a reasonable extrapolation of what is happening today into coming years—if major changes (catastrophes, miracles) do not occur.
- ✦ *Preferable* futures, which are clearly subjective, as seen by the eye of the beholder.

Volunteering is all about preferable futures, since people only volunteer for the causes they believe must be supported for a positive outcome. But recognize that "preferable" is an opinion, so do some reality checking to make sure that your organization and the volunteers who work within it envision the same ends. For example, the enormous changes in American health care in the last decade have led to hospitals being very dif-

ferent places than when many long-time volunteers signed up, with even more changes predicted. If you took a poll of the priorities of hospital administrators today and compared their responses to those of volunteers asked the same question, do you think the two groups would agree? What do you think new applicants for hospital volunteer positions envision when they project health care into the next decade?

On a practical level, this crystal ball gazing matters more than we may credit. If organization management (both paid administrators and the volunteer board) and the frontline paid and volunteer staff dream of futures that are not in sync, conflict is inevitable in such areas as budgeting, policy making, work design, marketing, evaluation and recognition. Differences in vision between the officers and members of all-volunteer associations will, similarly, lead to tension.

The other practical reason that futurism is necessary for volunteerism practitioners is that it can be applied to volunteer program development. The more you know about what concerns people publicly and personally, the more effectively you can craft your recruitment messages. The more accurately you can recognize new client needs and surmise the services your organization will start offering to clients, the better you will be in creating volunteer assignments on the cutting edge—proactively meeting those needs rather than reacting after-the-fact. A volunteer program that leads its agency into the best service provision is far more essential to mission than a program that waits to be dragged in new directions.

Becoming a Futurist

The first step in forecasting—and then taking action on—trends is to notice them! This means paying attention to the news and to commentaries on the news. It includes seeing recurring themes in fictional television shows and movies, too. Thirty years ago all sit-coms concerned nuclear families of mother/

father/sons/daughters. Today sit-coms offer mix-and-match families of single divorced parents, single never-married parents, couples without children, blended multiple married families, various sexual preferences, etc. If your organization serves children, for example, what do you, your colleagues, and volunteers picture as "family" and how does that mesh with what the children receiving services think?

Living in society with your eyes open, then, is a good first step to recognizing trends. But it takes conscious attention. Broaden your reading to include both the editorial and the op-ed pages of the newspaper. Skim through magazines geared to various audiences (teenagers, different professions, specific ethnic groups) and spot check what issues seem to be percolating (this is a great way to find value in the odd publications lying around doctors' offices and hair salons!). Attend a Chamber of Commerce meeting or a current events forum at a university or library. As you identify trends you want to follow, recruit volunteers to help you learn more about them, including surfing the web for more facts and opinions.

Once you feel in-the-know about trends, enlist help in analyzing the issues from different perspectives. Once or twice a year, convene a Trends Think Tank in which you invite volunteers and staff to discuss social, economic and cultural issues they feel are in flux and to consider how any of these might impact your organization. Ask volunteers to clip articles or refer you to useful web sites whenever something catches their eye as a trend alert.

It's very important to look beyond the "first wave" of anticipated outcomes of any trend. Something that seems quite negative may, after the first turmoil fades, end up more positive in the long run. In the same way, something that looks wonderful at first glance may evolve more problems over time. A good strategy is to make yourself (and

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Member Profile: Paula Rozyla, Holiday Inn—Rocky Mountain National Park-Estes Park

by Mo Goldman, ConferenceDirect

Paula Rozyla, a CSAE member for three years, is director of sales for Holiday Inn—Rocky Mountain National Park in Estes Park. She has worked for this Hotel for 18 years and has been its director of sales for the past 10 years. Now, that’s incredible! Because of the popularity of Estes Park for the leisure traveler, their high season is summer and fall—and they hold many conferences in the shoulder season. Paula’s primary markets are associations, corporations and government.

Born and raised in Flint, Michigan, Paula attended Mott Community College in Flint and earned an associates degree in business. (FYI- Mott as in applesauce). Most of Paula’s family still resides in Flint. After college she left Michigan and headed west. In the early 80’s she spent her summers in Yellowstone National Park working at the front desk of the historic, Old Faithful Inn and her

winters at the Old Faithful Snow Lodge. Paula says of her Yellowstone years, “I had the time of my life.”

In 1985, it was on to Grand Teton National Park in Wyoming where she spent a year working at Signal Mountain Lodge, owned by Forever Resorts of Scottsdale, Arizona. After her stint in the Tetons she transferred to Holiday Inn—Rocky Mountain Park, also owned by Forever. After eight years in Estes Park she returned to Arizona to work at Forever Resorts’ corporate office doing sales and marketing for their houseboat operations. Subsequently, she returned to the Holiday Inn in Estes Park where she’s been doing group sales for the last decade!

Recently remodeled, the Holiday Inn has 150 guest rooms, 13,500 square feet of conference space and this fall they will be renovating their restaurant, lounge and lobby.

Paula is proud of the fact that the hotel’s management staff has been together for nine years and that they have lots of repeat conference business.

Paula’s hobbies include acting in community theatre—she particularly favors musicals. She also loves outdoor sports including hiking, roller blading and cross-country skiing. Paula confides that in her younger years, she was a figure skater but, these days she prefers middle-eastern dancing—which she has studied for the past six years—and performs locally with the Oasis Dancers of Estes Park.

What does Paula want to be doing in 10 years? “Sipping a cappuccino from a villa overlooking the Mediterranean in Rapallo, Italy!” Interested in holding your next meeting amidst the beauty of Rocky Mountain National Park? If so, call Paula at 970-586-2332. ✦

Futurism

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your Think Tank) identify both positive and negative possible outcomes for any trend, even if one list is longer than the other. Know yourself, too. If you tend to be an optimist or a pessimist, force yourself to see another side of the issue—or get help doing so.

Finally, recruit expert volunteers as “advisors on the future.” A wealth of knowledge is available in every community and someone does not have to work on site as a volunteer to provide insight to you and key decision-makers. As volunteer program manager, you can ask all sorts of people to give a few hours a year to a meeting, a phone call, or a long e-mail to answer specific questions from their trained perspectives. Such advisors can be political figures, funders, media reporters, university faculty, or any type of civic leader. Here are sample questions you might pose:

- ✦ Given your area of expertise, what do you think is the most critical trend that our organization ought to prepare for in the next three years? The next 20 years?
- ✦ Given your understanding of our client group, what three issues do you feel will have the most impact on them, and how, in the next five years?
- ✦ Given your understanding of our local community, what changes do you envision occurring here in the next three years? The next 20 years?

These types of questions should elicit raw data that your Think Tank can then take and analyze from the perspective of your organization.

While you’re imagining the future, can you picture an organization that looks to the volunteer services department for its visionary thinking? That asks you to be on the strategic planning team? That uses the unique

ability of volunteers to respond quickly to new circumstances by testing innovative projects through volunteer action? Wow. ✦

Susan Ellis is president of Energize, Inc., an international training, consulting and publishing firm specializing in volunteerism. Founded in 1977, Energize has assisted organizations of all types with their volunteer efforts—whether they are health and human service organizations, cultural arts groups, professional associations, or schools. Visit energizeinc.com or call 215-438-8342 for more information.

Bylaws Hot Spots

by Bob Harris, CAE

In reviewing scores of bylaws, I find “hot spots” or common problem areas. Sometimes the bylaws are out of synch with the corporate laws in the state in which the organization is registered. Some bylaws are just old and outdated.

Bylaws represent an agreement between the organization and the membership. Thus, the document should be properly maintained for the most effective operations. Here are several bylaws “hot spots.”

- ✦ **Meeting Notices**—A requirement to mail or use U.S. Postal Service to announce meetings is inappropriate for an organization that notices official meetings by fax or email notices. Does your state allow electronic notices?
- ✦ **Voting**—A requirement to vote in person or by U.S. Postal Service as opposed to ability to vote by e-mail or return fax might identify a conflict in corporate law and organization practice.
- ✦ **Standing Committees**—Look out for a list of standing committees that no longer exist. Reduce the standing committee list to the essential committees and make sure there is authorization for appointing task forces or ad hoc committees.
- ✦ **Executive Committee**—Some executive committees meet and take action without authority for existence in the bylaws. Be sure the bylaws authorizes, empowers and limits the executive committee.
- ✦ **Voting on Members**—A requirement that the board approve all new members before being accepted may lead to an antitrust, slander or libel charge.
- ✦ **Discipline and Appeal**—Removing a member from the organization for cause but having no mechanism for notice, hearing and appeal by the member. Be sure bylaws allow for a process when charging or expelling a member.
- ✦ **Employees**—Give notice that the organization may hire an executive director who in turn is responsible for

all employees. The bylaws is a common place to do this.

- ✦ **Venue**—The requirement that the organization office be located in a specific city (usually the city of original incorporation) when indeed the office is no longer located there.
- ✦ **Ethical Integrity**—To protect the organization and board, it is appropriate to include in the bylaws any requirements for financial audits and liability insurance. If these items are

discretionary from year to year, the practice should match the policy and bylaws.

In conclusion, the bylaws are like the Constitution. The document should be protected against continual change but reviewed strategically to eliminate the “hot spots.” ✦

*Bob Harris, CAE, offers free management tools at www.nonprofitcenter.com. He can be contacted at bob@rebcae.com. *Bylaws Hot Spots.doc**



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CSAE 2004 Luncheon Calendar

January 8, 2004 Luncheon
Eye on the Economy

Thank you
Magnolia Hotel

February 6, 2004 Luncheon
*Coordinated Communications:
is technology always the
answer?*

Thank you
Hilton DTC

March 4, 2004 Luncheon
*Staying on the Cutting Edge of
Technology*

Thank you
Hyatt Regency

Denver
April 2, 2004 Luncheon
Board Governance

Thank you
Denver Marriott
West Hotel

May 6, 2004 Luncheon
*Customer Service—The Good,
The Bad & the Ugly.*

Thank you
Executive Tower Inn

June 4, 2004 Luncheon
*Effective Human Resources
Management*

Thank you
Marriott Denver
South

September 2, 2004 luncheon
*Positioning Your Association
for Financial Success*

A panel of association executives will discuss financial issues dealing with their reserve assets—from how their associations are currently positioned financially, to changes they are considering, to ideas for increasing reserves. The panel will try to offer ideas on what has worked, what has not and where to get help.

October 1, 2004 Luncheon
*Legislative Issues: Preparing
for the November Elections*

Government at all levels is a more expensive enterprise every year. Associations often fulfill needs that government cannot. The November elections will be your opportunity to review the upcoming election and the critical issues that may have an impact on the association industry and your future.

November 4, 2004 Luncheon
*Enhance Your Professional
Career*

Position yourself for career success. You learn how a CAE or CMP can enhance your professional career, the benefits of a career coach, career counseling resources, and how to get involved in your career.

December 3, 2004
Holiday Luncheon

CSAE 2004 Education Calendar

February 19, 2004 Seminar
*Facilitative Leadership: How to
Enhance Results and Maximize
Others' Contributions*
Jeff Cufaude, Idea Architects

Thank you
Hyatt Regency
Denver

April 22, 2004 Seminar
Accounting for Non-Accountants
Ed McMillan, CPA

Thank you
Hyatt Regency
Denver

September 21, 2004 Seminar
*High-Impact Governing in a
Nutshell: 17 Questions That
Board Members and CEOs
Frequently Ask*
Doug Eadie, Doug Eadie &
Company

What is the work of governing? For many CEOs and board members, the response seldom strays from the familiar mantra that governing means "making policies that the CEO and staff carry out." Stop! Take time with your board to develop a formal Governing Mission. Avoid the catchy two or three sentence promotional blurb. Hammer out a detailed listing of the impacts/outcomes that board's gov-

erning work is intended to produce over the long run. The work of governing will never be the same!

November 17, 2004 Seminar
*Policies/Procedures and Legal
Issues*

Bob Harris, Harris Management
Group and Faegre & Benson LLP

Fine tune your organization. Bob Harris will team with legal counsel to provide you with what you need to know so you can implement best practices in your organization and avoid any legal difficulties.



CSAE Registration Form

Name(s) _____

Association/Company _____

Address _____

City, State, ZIP _____

Phone _____ Fax _____

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

Attending new member orientation (January, March, April, June, September, October, December) Yes No

Attending how to network (February, May, November) Yes No

Alternative Luncheon Plate Fruit Plate Vegetable Plate

Luncheon Fees:

September 2, 2004: \$30/member \$35/nonmember

October 1, 2004: \$30/member \$35/nonmember

November 4, 2004: \$30/member \$35/nonmember

December 3, 2004: \$30/member \$35/nonmember

January 7, 2005: \$30/member \$35/nonmember

February 3, 2005: \$30/member \$35/nonmember

March 4, 2005: \$30/member \$35/nonmember

April 7, 2005: \$30/member \$35/nonmember

May 6, 2005: \$30/member \$35/nonmember

June 9, 2005: \$30/member \$35/nonmember

Education Fees:

September 21, 2004: \$149/member \$225/nonmember

November 17, 2004: \$149/member \$225/nonmember

Total amount due \$ _____

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