

Executive Memo

December 2002

Focus on Planning for
the New Year

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Seven Strategic Conversations for Association Executives

by the ASAE Foundation

What conversations should you engage your volunteer leaders and staff in to ensure your association's success?

According to the ASAE Foundation and the Institute for Alternative Futures, Alexandria, Virginia, there are seven strategic conversations that could affect your organization. Here's a preview of the seven issues you need to investigate for future prominence. These issues are detailed in *Exploring the Future*, available at asaenet.org.

1 Meaning Matters—As competitive pressures for members' time and involvement increase, successful associations will be those that create more than just the traditional supply of programs and products. With increased breadth in the delivery channels and more providers vying for member attention, there will be an ever-increasing array of available choices. So success will depend more and more on the creation of meaning in the minds and lives of prospects—meaningful relationships, a sense of community, social purpose, and contribution. The intangible aspects of "belonging and identity" will come to the forefront as the enduring qualities that will capture and hold member loyalties.

2 Transparency—The advent of the Internet, an increasingly vocal and activist public demand for greater accountability, the spread of democracy, and a litigious legal environment are all driving a trend toward greater organizational openness and accessibility. Associations, as public-benefit organizations, will be increasingly called on to be

fully open with respect to their governing processes, operating procedures, policy decisions and advocacy activities. This process of opening up may sometimes conflict with legitimate confidentiality concerns and business strategies, but the trend toward greater openness and accessibility is both unmistakable and challenging.

3 Global + Local = Glocal—This new term reflects how many aspects of life are shifting in one direction or the other, seemingly outward and inward at the same time. For example, many national-level decisions are taking on international aspects as association memberships expand internationally or products and services are sold across national boundaries. At the same time, there is a clear shift away from massive national regulatory and programmatic activity to more direct local control (by state and local governments and by state and local association chapters). As associations respond to their market changes, savvy business leaders will be prepared to deal with international operations as a matter of course and, at the same time, will need to be able to tailor products and services for delivery in very local markets.

4 Inclusivity—A broadening variety of cultural backgrounds and viewpoints within an association can improve creativity, inform decision making and enrich programming. Multi-everything and anything will be the watchwords—multi-ethnic, multi-racial,

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Executive Memo

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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

Take Time to Smell the Roses

—by *Karen M. Wojdyla, CSAE President*



The holiday season is upon us and another year is quickly coming to an end. It is a time for celebrating, reflecting and making resolutions for the upcoming year. We all experience the traditional celebrations with family get-togethers, parties and more food and drink than we probably need. This year, let's take the time to reflect and celebrate ourselves...and then make our resolutions based upon these reflections.

Isn't it interesting how over the course of the year we always try to maintain some "balance" in our lives but it doesn't always seem to work out? We want to spend more time feeling good about ourselves, taking more time to "smell the roses." We know we need to spend more time enjoying our families and friends. But, it never fails, we always find excuses—I need to finish that project at work or I have another job commitment. There will always be other soccer games, school plays, luncheons or dinners. Or how about, "it's no big deal if I don't see the movie at the theater, it will be out on video soon" or "I can take a hike or visit the zoo anytime."

There are just not enough hours in the day. How many times do we have to hit ourselves over the head to say "stop"? I know that this year I've run myself ragged and I'm not happy about it. I know it is the season to be happy and I promise I'm not going to pull a George Bailey on you. I just want you to take the time to realize that each of us is appreciated more than we realize and that our formal job commitments can sometimes wait—that the soccer game, the family dinner, luncheons and maybe even seeing that movie can be much more important over the long run.

I want to remind you that we are each unique and special. We need to recognize how important we are to our families, friends, colleagues, CSAE—even people we don't know. A smile, a kind word, an offer to help might make us a few minutes late to a meeting, but can change our lives. We do these things over

the course of the day, never realizing the enormous impact we have on others.

You are very important to CSAE. If you were not a member of the association, we would not exist. You bring different perspectives to the association. Make a resolution to get more actively involved in our organization. I want you to share your special expertise and knowledge with us. We also need to know whether we are meeting your professional and personal needs as they relate to your career. I greatly enjoy our monthly luncheons because I know I'll see warm smiles and friendly faces of my colleagues and have their support as I take a break from my busy day.

What a discouraging, isolated presidency I would have if I did not have my sharing, caring and talented board of directors to help me lead our association. Where would the association be without our many members who serve on committees, giving their time and energy to further CSAE and our profession? Lastly, it would be very difficult to run an association without the two people CSAE depends on most—Joan and Cheri. Take time to reflect on this and realize that we have quite a group to celebrate!

As you reflect on the past year, think first about your family and friends. Then, think about your challenges and accomplishments. Are you glad to see this year end? Are you hoping that 2003 will be better—or maybe that you'll take more time to celebrate the simple things in life? Did you accomplish everything you wanted to this year? I know I didn't. But...there's always next year. Personally, I can probably start by setting fewer and more realistic goals for myself and then, take a little more time to "smell the roses."

This holiday season celebrate your life and the lives of those around you. Get a jumpstart on next year by taking some time to recognize

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Twelve Resolutions for Association Executives

—by Robert C. Harris, CAE

The New Year is a time for resolutions—usually affecting family, health and home issues. Here are twelve+ resolutions for association executives to make and keep:

1. **Education Budget—I will fund staff education.** Most organizations budget less than one-half of one percent for staff training. Check your association's budget for professional development and ask the board to double it.
2. **Member Benefits—I will develop a value statement showing return on investment (ROI) for members.** Appoint an ad hoc committee to review existing benefits, trash the lame ones, improve the good ones, and add new ones that meet members' needs.
3. **Leadership Orientation—I will request that the board participate in an annual orientation.** Conduct a three-hour orientation focusing proportionally on the association, board responsibilities, risks, and goals. Develop a model leadership manual.
4. **Letter of Determination—I will find and safeguard the IRS exempt status letter.** If it is lost, write to an IRS service center today for a replacement.

5. **Strategic Plan—I will dust off the old plan and schedule time in 2003 to develop a new strategic plan with the board.** Be sure to translate the plan into a staff action plan, business plan and a PR document to position the organization.
6. **Surveys—I will conduct at least one or more member surveys.** Find out the needs and satisfaction of members by using survey methods in the forms of business reply cards, the Internet, newsletter questionnaires and focus groups.
7. **Tangible Benefits—I will develop one new product in 2003 that will cause members and prospects to beat a path to the association door.** Transform information into tangible benefits that can be touched, sold and shared to increase association value and brand awareness. Try turning a new law into a compliance manual or an economic impact survey into an industry economic impact report.
8. **Policy Manual—I will dust off the policy manual and update it at the start of the year.** Use a task force to review outdated policies, sunset the manual if it is old and adopt a new

one with a motion of the board.

9. **Committees—I will cast out committees that serve no purpose. Streamline committees by eliminating all but the essential, aligning committees with the major goals of the strategic plan.** Utilize ad hoc committees and task forces, special interest groups and a committee resource pool. (Committee resource pool is defined as the contributions from volunteers in the form of specific skill offerings rather than serving on a committee.)
10. **Operations Manual—I will admit that the information in my head should be documented on paper in the form of an operations manual.** Few executives leave a legacy of an operations manual that describes every facet of managing the association. The project may take several months but the rewards are lasting.
11. **Organization—I will resolve to clean out files, shelves and storage units.** Clutter can be over-

whelming, costly, and wastes time. Create a central file system and adopt a record retention schedule to manage information-overload.

12. **Health—I will maintain my health, and encourage the same of staff, so that we can be effective association managers.** Find ways to get grounded and stay balanced with time-off, quiet time, outside interests, exercise and a healthy diet.

Bonus Resolution

The final resolution is the easiest of all and facilitates the first twelve. I will support CSAE by involving staff in seminars, by serving on committees and by networking with colleagues so that the association resolutions are easy to implement and maintain for a successful New Year! ♦

Bob Harris, CAE, offers free association management tips and documents at his Web site, www.nonprofitcenter.com. He is founder of the Association Self-Auditing Process® and conducts strategic planning. Contact him at bob@RCHCAE.com.

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Seven Strategic Conversations

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multi-national, multi-special interests, multi-generational. Associations can and will leverage this diversity to capture new markets, expand opportunities, broaden the reach, and increase the depth of their activities. More than merely allowing for individual differences, the trend is toward a broader and more welcoming inclusion.

5 Generational Synergy—The Millennials (born between 1982 and 1999) will be entering the workforce in large numbers in the next five years. As they begin their careers, they will comprise the next generation of association members. While the scale and nature of this group is notable in its own right, possibly a more challenging realization is that there will then be four distinct generational cohorts under the same organizational roof: the Silent Generation (born 1925–42), the Boomers (born 1943–60), Generation X (born 1961–81), and the Millennials. Demographers have noted clear differences in outlook and inclinations among the four groups, and the association community will struggle to accommodate all four in effective, meaningful ways. Each generation has contributions to make and roles it can play, and associations that can foster intergenerational synergy will gain enormous advantages.

6 Learning Culture—The ability to learn is the most important skill individuals and organizations need to be successful amidst

rapid and continual change. Associations will need to focus more on continual member learning than on teaching traditional workshops and seminars or selling books and tapes. Learning styles, communications technologies, 24/7 operations, global distribution, the Web, and other advances will have tremendous impact on how associations address the learning needs of their audiences. Associations will also need to address their internal (staff) learning needs in new ways.

7 Living Organizations—As nearly everything seems subject to change, so will we change the way we organize ourselves to do business. The era of “command and control” management is over. Under stress, rigid systems break. The older, heavily structured and regimented management styles are giving way to more fluid, flexible, and adaptive approaches that foster self-organizing activity. With the rapid change, association management will need to tolerate (and encourage) greater member independence and individual responsibility. This could bring with it a certain amount of ambiguity and confusion, but failing to adapt will likely result in memberships that go elsewhere. ♦

American Society of Association Executives, Washington, DC. Phone: 202-626-2723 Fax: 202-371-8825. Access this report, Exploring the Future, at asaenet.org.

President's Message

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how special you are to all of us at CSAE, as well as to everyone else around you. Have a wonderful and blessed holiday season.



Karen M. Wojdyla
President

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How I Got Here...

Once again, CSAE Execs responded with vigor! The question, "How did you get here?" brought many "you won't believe this, but..." stories. A few of us attacked the profession with a mission, but most of us are "accidental executives," taking a winding path to fulfilling destinations.

Because of the number of responses, we are publishing these throughout several issues. Watch for them—stories about you—in this and coming editions of **Executive Memo**.

**Doris G. Finnie, Conference Coordinator
Coal Mining Association**

Throughout my life, I'd always arranged meetings and loved detail work. I got in on the ground floor at the Rocky Mountain Coal Mining Institute. It began with their reorganization by redoing bylaws and, if they'd had an office cat, I would have fed it too! For 18 years I served in this capacity and loved every minute of it.

**Kristen Sirovatka, Executive Director
Associated Landscape Contractors of Colorado (ALCC)**

I was bartending in Washington, DC and getting ready to graduate from college. A friend was going on bed rest for the last two months of her

pregnancy and needed someone to fill her spot. The prospect of spending the summer in an air-conditioned building, instead of at an outdoor café/bar in the sweltering DC heat, was too good to pass up. After running my first conference I was hooked on associations. Luckily, my friend elected to be a stay-at-home mom, and I kept my night job for a few years. I spent eight years with an association in Washington and have been with ALCC for the past two.

This was a fun question to answer. The many hats we get to wear in association work is what makes it fun...and never boring! Even when the learning curve is straight up, we can always get something out of it. ♦

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Tech Tip: Saving and Storing Your Files

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@rmel.org.

When creating a file, understanding how they will be used is an important indicator of the storage medium you should use. There are a variety of storage devices, all of which have their advantages and disadvantages. Here is a review of some of the more commonly used mediums.

Floppy Disks

These are the most commonly known storage disks. They are called “floppies” and are approximately 3.5 inches tall. They are easily transferable from computer to computer, but unfortunately can only contain up to 1.4 megabytes. Since file sizes have dramatically grown over the last few years, this makes floppies most useful for smaller size files. You can read and write data to a floppy repeatedly via a floppy disk drive.

Compact Discs

Quickly becoming one of the most popular storage mediums is the compact disc. CD's are read via a CD drive. There are different types of compact discs:

CD-R: A CD that can be read but only written to a single time. They can store quite a bit of data, approximately 700 megabytes. Good for large files, from computer to computer.

CD-RW: A CD that can be read and written to multiple times. Can store approximately 700 megabytes. Good for large files, but not necessarily readable by all computers.

DVD-ROM

Needs a special DVD-ROM drive to be read. Used mostly for video files, as they are very large. Can store massive amounts of data—about 4.5 gigabytes.

ZIP Disks

ZIP disks are a beefed up floppy disk that can be read and written to over and over. Some Zip disks are made to store up to 100 megabytes, others 250. They are best for large, on the go files. Since ZIP disks need a special ZIP drive to be read, these disks are best for those who have ZIP drives.

Hard Drives

A hard drive is a different type of storage media. Most hard drives are internal, kept inside your computer. When you save files, this is most often times where they get stored. Sizes of hard drives vary, but can be anywhere from 20 gigabytes to 80 gb. Used for documents of any size that won't be transferred.

A external (or removable) hard drive can be used to transfer large amounts of data from one computer to another. This method is best for computer files using the same platform. The external drive connects using a port.

Other Storage Media

Other types of storage media include tapes, external hard drives, and removable disk drives. ♦

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Ready, Set, SKI! Practical tips for hitting the slopes

—by *Vineta Campau, Communications Director, Colorado Chiropractic Association*

It sounds nuts! “Let’s strap some slippery boards to our feet and fly down a snowpacked mountain.” Crazy as it sounds, skiing and snowboarding are incredibly popular winter activities—and lots of fun. Being popular and fun does not make them safe, however. These are dangerous sports, but with a little common sense, you can make your time on the slopes safe and enjoyable.

Shape Up for the Slopes

Get ready to ride and ski at least four to six weeks before your trip. Try a combination of agility, strengthening, and flexibility exercises. Aerobic exercise will build stamina and weight lifting or stair climbing will build strength. For balance and agility, try jumping rope or raquetball.

Be honest with yourself about the limits of your ability and physical condition and then ski within those limits. Be sure to get your equipment in shape BEFORE you go. Skis and snowboards should be tuned every year by a reputable ski shop, including a check of the bindings. Check your boots for proper binding fit and sole wear. Your bindings are the most important part of your equipment and they should be replaced every three to four years. Have the releases on your bindings checked by a qualified technician. The leg you save could be your own.

Know What You’re Doing

Take lessons. You’ll be much more confident—and safe—if you learn from an

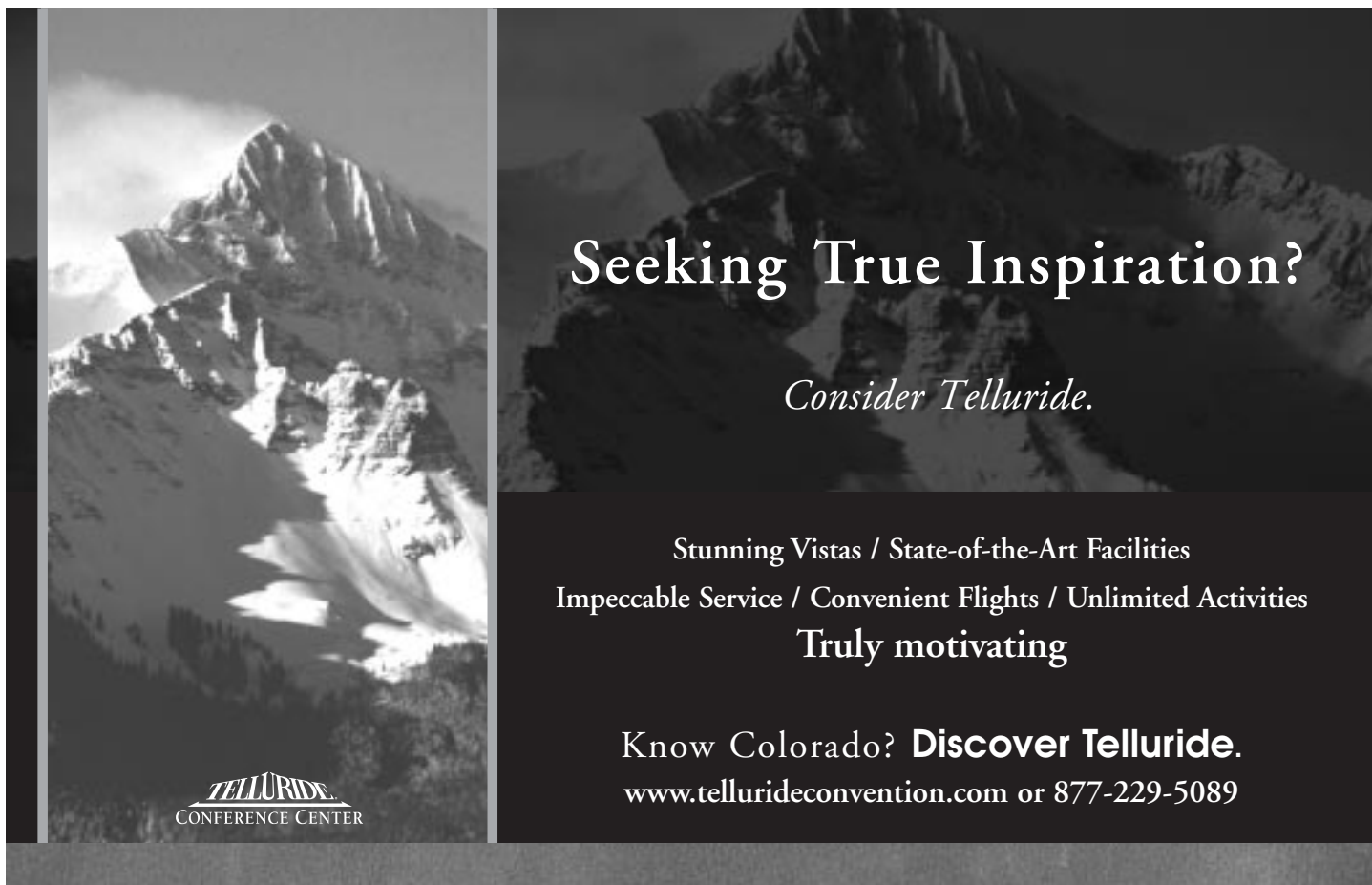
expert. You’ll also find out about skiing and riding etiquette.

Read trail maps ahead of time. Most ski resorts have web sites with trail maps included. Only ski on runs that are appropriate for your skiing ability.

First Run Do’s & Don’ts

- ◆ Do eat a healthy breakfast before your day on the mountain. Don’t forget to drink plenty of water during the day because dehydration is common at high altitudes.
- ◆ Do some simple stretches before the first run, including your calves, hamstrings, and lower back muscles. Jog in place for a few minutes.

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Shape Up for the Slopes

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- ◆ Don't start with a difficult run! Take a couple of runs on the easy slopes first to loosen up before you tackle the run named "Psychopath."
- ◆ Don't be afraid to say "no" to a run that is too difficult for you. Take your time and go at your own pace.
- ◆ Focus 100% of your attention on your skiing or boarding and the mountain in front of you.

What Do I Wear?

Mountain weather is unpredictable, so be prepared. In addition, as you exercise, you'll build up body heat, so dress in layers. Then you can peel off or unzip different layers as the weather dictates. A hat is vital. Bring a hat even if you don't think you'll need one. Over 30% of your body heat is lost through your head. Mittens are warmer than gloves.

It's often sunny on the mountain and the reflection from the snow makes it extremely bright. Be sure to wear plenty of sunscreen and good sunglasses or goggles with UV protection. Goggles are essential when it's snowing.

Helmets are the latest rage in ski resort wear, but don't think you're completely safe from injury if you wear one. Always use common sense and ski or board within your limits.

The Last Word...

Avoid taking one last run. Typically, the last run of the day is the most dangerous. You're tired, the waning daylight makes nasty bumps harder to see and everyone else is tired, too. Quit early and enjoy the wonderful après-ski activities. Have fun this winter and stay safe! ◆

Live by the Colorado Ski Code

Skiing and snowboarding can be enjoyed in many ways. You may see people using alpine skis, snowboards, telemark skis, cross country skis or specialized equipment. Regardless of how you decide to enjoy the slopes, always show courtesy to others. Be aware that there are elements of risk in skiing that common sense and personal awareness can help reduce. For information on the Ski Code visit the National Ski Patrol Web site at www.nsp.org.



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

An association has 15,000 members who are eligible to vote in the association election. Two days before the ballots must be returned, it is discovered that ballots were not received by a class of 100 members who are eligible to vote. Once the current chief elected officer is notified, who should the chief staff executive contact next?

- A.** The election candidates
- B.** The class of excluded members
- C.** Legal counsel
- D.** The nominating committee

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December Luncheon

Annual Holiday Celebration and 50th Anniversary Celebration

It's time to celebrate the holidays. CSAE's Holiday Celebration will be held at the new Renaissance Suites at Flatiron, 500 Flatiron Boulevard in Denver, Colorado. Once again, you'll have the opportunity to bring gifts for the less fortunate who are assisted by the Samaritan House, hear seasonal music, take time to laugh, and mix with your peers while enjoying the season. We will also have a wrap up celebrating our 50 years as the Colorado Society of Association Executives.

Karyn Ruth White from Laugh and Learn Productions will join us for the program and share her thoughts on the holidays. Karyn is a stand up comedian (headlining nationally for over 10 years) and spoke at last year's Meetings Industry Council. Her famous keynote program called Laughing In The Face of Stress has

been called hilarious and right on target!

All members are asked to bring a new, unwrapped gift to place under the Christmas tree in our meeting room. The gifts will be donated to Samaritan House to be distributed to those families served by the well-known Denver Agency. If you can't attend the luncheon but still want to donate a gift, just drop it off at the CSAE office prior to the December event and it will be placed under the tree. Cash donations are also welcome.

At this holiday celebration, we will recognize our past presidents and those members who have obtained the CAE designation with reserved seating.

Bring a gift, enjoy the music, share a laugh and celebrate 50 years as the Colorado Society of Association Executives!

December Luncheon

What: CSAE's Annual Holiday Luncheon and 50th Anniversary Celebration

When: Friday, 12/6/02

Where: Renaissance Suites at Flatiron, 500 Flatiron Boulevard, Broomfield

Directions: From Highway 36 take the Storage Tech Exit. Go left to the second stoplight. Turn right at Interlocken Blvd. Turn left at Flatiron Blvd. Renaissance Suites is on the left about one block.

Time: 11:00 a.m.—Orientation
11:30 a.m.—Networking
12:00 noon—Lunch
12:30 p.m.—Program

Cost: \$30/pre-registered members
\$35/walk-in members
\$35/nonmembers
Additional \$5 for unfilled reservation

Cancellation deadline: 12/4/02

CSAE Registration Form

December

Name _____

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

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

Total amount due \$ _____

Method of Payment Check AMEX Visa/MasterCard

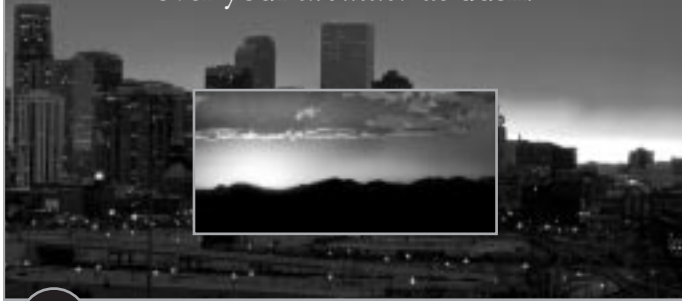
Name _____ Number _____ Exp. Date _____

Register today by fax 303-368-4222
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GREAT RATES

Mark Your Calendar

**Wednesday,
December 4, 2002**

Leading in Turbulent Times
Holiday Inn Select Denver
Cherry Creek, Denver

**Thursday,
December 5, 2002**

Network for the Needy
Colorado Convention
Center Ballroom, Denver

**Friday,
December 6, 2002**

*CSAE's Annual Holiday
Luncheon and 50th
Anniversary Celebration*
Renaissance Suites at
Flatiron

**Thursday,
January 9, 2003**

Membership Luncheon
Brown Palace, Denver

**Tuesday,
March 25, 2003**

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