



# Headquarters REPORT

## Tips & Tidbits

- The Communications Department added a color printer to their tool set. The printer has reduced the need to send color files out to our vendors for color proofs. This decreases cost and turn-around times.
- Ensuring accurate and regular back-ups of our data is always a priority so once again we've upgraded our tape back-up system. The new system accommodates our increased data storage needs.
- Using clip art and photographs helps us increase the readability of the publications we create for our clients. We've increased our art library with the purchase of a gallery of 1,300,000 images and photographs. The package is searchable, making it much easier for our graphic artist to find multiple images on the same theme. The library also includes web images, animated objects, fonts, sounds, and video clips. It's a collection that will benefit our clients for years to come.

## Association Resources Earns Accreditation

*Francine Beltrame*

Association Resources, Inc. (AR) is pleased and proud to announce to our "family" and friends, our newly acquired and highly coveted status of "Charter Accredited Association Management Company."

This designation is awarded by the American Association of Association Executives (ASAE). ASAE, a national association representing trade groups, philanthropic and nonprofit organizations, is dedicated to enhancing the knowledge and competency of association executives, promoting excellence in association management and helping associations to better serve their members and the public.

Accreditation is a mechanism for recognizing association management firms, such as AR, that meet, operate and adhere to the highest



professional and ethical standards. ASAE's stringent standards address management services and activities, resources and protections, operational policies and contracting procedures.

The accreditation program applies only to those firms that provide top quality services. ASAE assesses the association's practices and procedures and formally recognizes the firms that meet the requirements as set forth by the ASAE Accreditation Commission. The purpose of this accreditation is to improve the overall quality and effectiveness of the industry and encourage all association management companies to rise to these standards.

ASAE not only assists the association management community, but

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### Did You Know?

*Our web team is constantly expanding their skill sets. At the end of 2000, Tony Rogers pursued courses in Cold Fusion programming. He has already developed one site using the new product and has transferred a second one to the more powerful and flexible infrastructure. A third Cold Fusion site is being expanded and maintained by the web team. A side benefit to hosting a Cold Fusion site is the opportunity to move the list serves to Lyris, a sophisticated list serve product.*

# In the Limelight

## New Staff Member Brings Marketing Expertise to AR

With more than 15 years of experience in non-profit marketing and development, Francine Beltrame joined Association Resources in March



2001 as an Account Executive. Her experience in non-profit marketing is already being tapped by several clients.

The work that Francine has been involved in includes marketing to recruit members or increase attendance of non-members at association meetings. She has also worked to promote association products such as web sites and publications to association members. "Although the work I do may be similar among groups, the requirements of each job are unique," states Francine. "That's why the work is so interesting. No two jobs are exactly alike even if I am marketing the same type of product. The variations in product and audience mean I have to look at each job as a new one."

Marketing for non-profits has its unique challenges. One of Francine's first questions when she begins a job is: "What is the budget?" Unlike corporate environments where four-color glossy is the accepted standard, it is rare that she has a budget large enough for such elaborate print jobs. Having tight funds requires ingenuity. "Being creative is certainly a large part of what I do and the more limited the budget,

the more creative I have to be," says Francine.

Electronic communication has improved Francine's chances at reaching a large audience with

limited funds. Personalized e-mail blasts have helped her get the message across numerous times. The use of association web sites also improves her reach.

Other challenges include narrow markets, where the population is small and finding the audience is difficult, or coming up with just the right "hook" to draw people to the cause.

"Fran has been an asset on every project she has been assigned. She is creative, diligent, and effective. We love having her on our team," says Suzanne Berry, CAE and Executive Vice President of

Association Resources. "She hasn't been here long but I can no longer imagine AR without her."

Francine's background in non-profit management includes work as Program Director and then Executive Director of the Central CT Unit of the American Cancer Society. Five years later, she was recruited to the American Red Cross, as Assistant Director of Blood Services, where marketing was her primary responsibility. Francine spent two years as a marketing consultant for Advantage Marketing Associates and three and a half years with the MetroHartford Chamber of Commerce as Director of Membership Services.

It is a pleasure to have Francine on our team, and we know you'll be glad to have her on yours when your association starts its next marketing campaign.

### Professional Development Goals Reached

Steve Rugens, AR's Meeting Planning Department manager, recently completed his studies and passed an extensive examination to earn his CMP (Certified Meeting Professional) designation. The pursuit of the CMP requires dedication and diligence — the exam itself takes hours to complete.

Lisa Hutner, one of AR's account executives, received her Certificate in Organization Management, a certificate that earns points towards the CAE (Certified Association Executive). Lisa completed four, one-week programs over four years at the Institutes for Organization Management at the University of Delaware, Newark, DE.

We are proud of Lisa and Steve, and invite you to join us in congratulating them on their achievements.

# CEO Symposium Offers Many Opportunities for Association Leadership

*Lorna M. Bolduc*

Association Resources believes in building the volunteer leadership because it creates a healthier, stronger organization. One of the primary tools we recommend for leadership development is the CEO Symposium offered by the American Society of Association Executives (ASAE). This program offers a plethora of ideas and strategies for association governance as well as leadership team-building opportunities.

## Turning Point

The CEO Symposium could easily be a pivotal event for the leadership of an association. Conveying the value of this program is not unlike parents advising parents-to-be that their life will never be the same once the baby is born. The parents-to-be just can't imagine how dramatic that change will be. Well, prepare yourself for the same type of experience. The CEO Symposium opens your eyes, gives you the information you need to move your association forward, and builds your leadership team. Your views on association governance may never be the same.

As the executive director for a new client, I had the opportunity to attend the CEO Symposium for the first time. In most cases, AR spends years convincing boards that they need to incorporate this program into their budget. Our new client had already made the commitment, as it was one of the many steps they

were taking to move from an administrative board mired in management details to a governing board guided by strategic objectives.

The timing of the symposium was perfect for us. We had just started working together three weeks earlier and the board would be transitioning its leadership in three months. Attending the program with me were the incoming president and vice president, the leadership I would be working with for the next two years.

Because we were a new team, the team-building segment of the program was particularly important. The symposium leaders brought us together to define our individual roles, the expectations we had of each other, and our work styles and preferences. This was done within the context of our association's strategic goals.

Exploring the realities of how administrative boards typically operate vs. how strategic governing boards should govern significantly impacted our views on the direction our board should take. We knew the administrative model was no longer our preferred operating method. However, we didn't know how to move from one operating style to the other. This dilemma was partially solved at the symposium through discussion and deliberation. And then beginning on page 162 of our manual, there it was, nicely outlined for us: "Implementing Knowledge-Based Strategic Governance."

## One Obvious Solution

The first bullet states that for boards that want to move away from the administrative details of day-to-day management

- don't put administrative details on the board agenda because boards will discuss what is on the agenda.

But, of course, why didn't we think of that?

Changing our agenda was our first step towards strategic governance. At our board meeting we assigned oversight responsibilities, priorities and target dates to our strategic objectives. We discussed action requests that related to the strategic plan and sent back to committee those items that were not board issues.

It wasn't a perfect process but it was a start.

## Staying on Track

We reverted to old habits a few times. It was hard to let go of the administrative details, and we couldn't incorporate everything in our first meeting. But in our reach for success as a governing board, one of the guiding principles is

- a board should define and delegate, rather than react and ratify.

Another key principle addresses how boards spend their time. The board should not be collecting information and then reviewing what was done. A board should

- spend its time using information and determining what needs to be done next, and

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## CEO Symposium

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- spend 80 percent of its meeting time in dialogue, deliberation, and decision-making about issues of strategic direction and/or policy.

Staff and volunteer work groups should report to the board only when there is something getting in their way and that something needs to be dealt with by the board. Otherwise, it's not a board worthy issue.

## There's More

A few columns of text barely serves as an introduction to knowledge-based strategic governance. If you're interested in finding out more about the CEO Symposium, talk to your executive director. Make the investment in your leaders and the association's future. You can't imagine the effect it will have. Making changes at the board level won't be easy, but the benefits will outweigh the difficulties — not unlike becoming a parent!

## Accreditation

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also the associations they represent, by identifying the standards and criteria that are indicative of quality management principles and practices as identified by the following criteria.

The association management company:

- Recognizes the unique missions, goals, structures and needs of their clients and endeavors to meet those needs.
- Operates ethically and in compliance with all applicable laws and regulations.

- Represents accurately the expertise, experience, credentials and services of their firm and staff to the public.
- Manages all client accounts and funds in compliance with accounting rules and regulations as per the Financial Accounting Standards Board.
- Observes federal tax requirements for maintaining tax standards of their clients.
- Has written policies precluding co-mingling of assets among client associations or with the assets of the firm.
- Has a contract agreement with each association client stating services, fees and billing procedures and the term/termination aspects of the contracts.
- Ensures that employees are qualified to provide client services.
- Maintains bonding insurance to protect association clients against employee dishonesty.
- Maintains comprehensive insurance coverage to protect association clients.
- Maintains full and accurate records of current and prior association clients, maintains confidentiality of client records, data, proceedings, contracts and other client-specific information, and provides/maintains a written client confidentiality policy.
- Investigates and avoids all potential conflicts of interest in the representation of association clients and provides a written conflicts of interest policy.
- Communicates regularly with their association clients to ensure that contracted services are provided in an effective/efficient manner.
- Ensures the integrity and confidentiality of a client's relationship with its legal counsel, including, but not limited to, the protection of all privileges.

Furthermore, ASAE's accreditation program and process ensures that an accredited firm not only meets, but adheres to their rigorous standards, reassuring represented associations a continuum of quality work will be provided on their behalf.

Of the 169 association management companies that are ASAE members, AR joins an elite group of 22 firms that have become ASAE's "Charter Accredited Association Management Companies."

According to an ASAE representative, "AR principals Peter J. and M. Suzanne C. Berry, Certified Association Executives, are most deserving of this achievement and ASAE is proud to welcome Association Resources, Inc. as a 'Charter Accredited Association Management Company.'"

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