Colorado Society of Association Executives

Executive Memo

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Focus on Leadership

Inside

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Writing Winning Grants

by Julie Evans, JFE & Associates, Ltd.

Successful proposal writing involves advance planning. It takes time to research, organize, write, package and submit a proposal to a funder. Before you begin, consider the following questions.

1. Can you prove you have a significant need or problem?
2. Can you recommend a solution to the need/problem?
3. What are the greatest strengths of the organization?
4. Have you adequately reflected on the vision within your organization? Are you prepared to spell out that vision in the proposal?
5. Did you research grant makers, their funding purposes and priorities? Is your organization an eligible applicant?
6. Do the grant maker's goals and objectives match your stated needs?
7. Did you target your proposal to grant makers that are appropriate to your field?
8. Did you contact the grant maker before you wrote the proposal to be sure you clearly understand the guidelines?
9. Be prepared to answer these questions: Who are you? How do you qualify? What do you want? What problem will you address and how? Who will benefit and how? What specific objectives will you accomplish and how? How will you measure your results?
10. Did you follow the exact specifications of the grant maker's requirements as printed in their guidelines?

There are different forms and formats for funding proposals. We are lucky that in Colorado, many foundations will accept what is called the common grant proposal. By submitting a similar format to a variety of foundations, you can save time. It also helps streamline the application process, but know each funder still has different guidelines, priorities, deadlines and timetables. The number one complaint foundations have about applicants is that too many applicants do not research the foundation well enough or understand their priorities before applying. So, be sure to do your homework well.

Make it neat and professional but not too glitzy. Send it in on time and then move on to the next one!

Always follow the specifications the grant maker states in the grant application. Generally, proposals are 10 to 12 pages in length and include:

1. A cover letter and/or summary sheet
2. Narrative
   - ✦ The need
   - ✦ Goals and Objectives
   - ✦ Evaluation
3. Budget
4. Appendices

Typically, the cover sheet presents a case statement and proposal summary. Your introduction is one of the most important documents in the proposal. More often than not proposals are funded on the reputation of the

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Executive Memo

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President's Message

Accomplishing More Through Leadership and Having Fun Along the Way

—by Raquel Alexander, MA, CAE, CSAE President (aka Randi J. Morris)

A valuable quality of leaders is that they teach by doing. Those who observe them can readily gain insights into how to replicate leaders' successes and avoid their failures. With some leaders, their means of operation are seen only by those few who report directly to them. The motives and actions of others are clear to all in the chain of command. Still others go so far as to lecture and write about leadership.

Among those who have written convincingly about leadership is Colin Powell, the former chairman of the Joint Chiefs of Staff and current Secretary of State. Some of his principles of leadership follow conventional wisdom. For example, he admonishes would-be leaders to be vigilant about details and to avoid having too much of their ego or identity tied to their positions. He says people matter more than plans.

But some of his advice may seem counter-intuitive. According to *A Leadership Primer* on the web, he advises, "Being responsible sometimes means pissing people off." He also warns against the tendency to put too much stock in experts and elites. And, he states the drive for absolute certainty can lead to "analysis paralysis." His formula is to act with sufficient information. "Don't take action if you have only enough information to give you less than a 40 percent chance of being right, but don't wait until you have enough facts to be 100 percent sure, because by then it's almost always too late."

What is one to do with the lessons available in the workplace and from leaders like Powell? One of the paradoxes of leadership is that it requires the ability to balance independent thought with ideas from outside sources. True leaders are unique. They borrow from those they admire while blazing their own trail. The payoff is in the results. Powell states, "Leadership is the art of accomplishing more than the science of management says is possible."

As association executives, it is our responsibility to both serve as leaders and to help elected association officers develop their individual leadership paths. And we're apt to have the greatest success if we follow two of Powell's pointers. First, stay positive. "Perpetual optimism is a force magnifier," he states. And second, have fun.

Raquel Alexander, MA, CAE
CSAE President

Kaizen Blitz Technique Improves Operations

by Bob Harris, CAE, Harris Management Group, Inc.

The *Kaizen Blitz* is a strategy for making improvements to an organization's operations. Though originally used in manufacturing, its application can benefit nonprofit organizations.

Toyota implemented Kaizen in the 1950s relating to quality circles. *Kaizen: the Key to Japan's Competitive Success* by Masaaki Imai explains that rather than checking for defects at the end of the assembly line, they set up quality checks along the line.

The phrase, *Kaizen Blitz,* is described in *The Kaizen Blitz: Accelerating Breakthroughs in Productivity and Performance.* The purpose is to bring staff together to review targeted operations, make suggestions and take steps for immediate improvement. The process is without great cost, down time or drastic change. It utilizes existing resources and experience to improve any operation.

Blitz Examples

Consider these illustrations of how the blitz helped to make these simple but important improvements.

Policy Manual—The executive director distributed the policy manual and asked, "How can we improve this?" Staff commented, "I've never seen this manual. What's wrong with it?" and "Why are the pages so yellowed?"

Everyone agreed it needed work. A recommendation was to separate it from the personnel manual. The next comment was to add a table of contents. Another staffer said, "If policies are created by motions of the board, do we have a procedure for updating it after every meeting?" With a flipchart and 15 minutes of creativity, the staff made these suggestions:

- ✦ Add a table of contents
- ✦ Add dates when each policy was adopted or amended
- ✦ Update it at least one time each year, if not after every board meeting
- ✦ Ask a committee to review and sunset policies every three years
- ✦ Keep a virtual copy on the web site, password protected
- ✦ Include it in the board's leadership manual
- ✦ Create a nice cover page and binding
- ✦ Write a foreword as to the importance of policies

The improvements were completed within the month. The blitz ended with staff having a better understanding of the value and use of the policy manual.

Insurance Files—Few staff understood all the insurance coverages. This blitz proved to be an opportunity to explain insurance and make improvements. Staff discussion went like this:

- ✦ How many years do we need to keep old policies?
- ✦ Should we file directors and officers (D & O) coverage under "D," the name of the agency, or in a central file under "I" for insurance?
- ✦ What about volunteer immunity coverage?
- ✦ I told you we should purchase meeting cancellation insurance!
- ✦ What's the difference in coverages?

After 10 minutes, decisions were made to reorganize the files in a central location, toss the old policies, get a quote on meeting cancellation insurance, and have a lawyer review the directors and officers policy before renewal.

These examples demonstrate that staff can make improvements to many operations using the simple, fast, low-cost method of the *Kaizen Blitz.* ✦

Kai—to change or modify

Zen—to improve or make better

Kaizen—gradual, orderly, continuous improvement

- ✦ Select a process or activity that could use improvement. (For example the policy manual, board meetings or the newsletter.)
- ✦ Bring together all levels of staff (team process) with a goal of making improvements.
- ✦ Brainstorm ways to make improvements for an hour or several hours.
- ✦ Be open-minded and positive.
- ✦ Reject excuses and "we have always done it that way."
- ✦ Ask "Why is it done this way?" (or "Why not?")
- ✦ Use everyone's knowledge—disregard rank.
- ✦ *Kaizen Blitz* doesn't mean making proposals or studying the problem—it is about taking action.
- ✦ Move on to another process or activity.
- ✦ Recognize it is low cost, high input and a creative process.

Bob Harris, CAE, promotes efficiency, assessment of operations and risks, and conducts board development and strategic planning. Visit www.nonprofitcenter.com for free management templates and tools. He is creator of the 150-question, 48-page self-audit process for nonprofits.

Grant Writing

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applicant organization or its key personnel, rather than on the basis of the program's content. The introductory statement should concentrate on "what gives the organization credibility in the eyes of the funding source?"

Your cover sheet is followed by a narrative which provides concise information about your organization, the need, the goals and objectives of the project and how it will be evaluated.

The Need

Within the narrative, the "Need" section zeros in on the specific problem you want to solve through your proposed program. When writing your need statement, take time to:

- ✦ Relate the need to situations in the life of your clients or community.
- ✦ Make the statement quantifiable with statistics.
- ✦ Demonstrate a clear relationship to your organization's mission and abilities to solve the problem (need) in a meaningful way.
- ✦ Include solid evidence supporting your claims about the nature, size and scope of the need. The problems in the need statement should be serious but not insurmountable.

Goals and Objectives

After you identify the need, explain what your program goals and objectives are. Make sure your goals and objectives are tied directly to the need statement. Include all relevant parties in the target population. Determine how you are going to measure the change you are projecting in your objective. If you find you have no way to measure change, you probably need to rethink the objective. Allow plenty of time for the objectives to be accomplished—things take longer than planned.

Evaluation

An evaluation of your program serves two purposes. Your program can be evaluated to determine how effective it is in reaching its stated objectives. It can also be used as a tool to provide information necessary to make appropriate changes as your program proceeds.

When setting up your evaluation, determine:

1. What are the outcomes?
2. What are the impacts?
3. What questions will your evaluation activities seek to answer?
4. What are the specific evaluation plans and time frames?
5. What kinds of data will be collected?
   - ✦ Using what strategies or instruments?
   - ✦ Using what comparison group or baseline?
   - ✦ What procedures will you use to determine whether the program was implemented as planned?
6. Who will conduct the evaluation?
7. Who will receive the reports?

Budget

In preparing your budget make sure you answer these questions.

1. Is the budget consistent with the proposal's program plan?
2. Is there a budget narrative that explains items that may not be immediately clear?
3. Does the budget include in-kind revenues and expenses?
4. Does the budget address the question of how overhead costs will be recovered?
5. Can you accomplish the intended objectives with the proposed budget?

Once the application is prepared, spend time to format and package it appropriately. Some foundations are actually critical of grant applications that are too flashy, so make it neat and professional but not too glitzy. Send it in on time and then move on to the next one! ✦

Julie Evans is a professional grant writer who offers a range of services to organizations that cannot afford a full-time development officer. She can be reached at 303-773-0440 or jfe@qadas.com.

Principled Networking® Tip: It's Not What You Say, It's What You Ask!

by Julia Hubbel, The Hubbel Group

Do you worry about what to say when you come to CSAE luncheons or the conference? Are you concerned that you won't be interesting or entertaining when you meet strangers? Do you wonder if your 30-second elevator speech is going to bomb?

Here's the Real Question to Consider: Who Cares?

Meeting people should be all about them, not you. If you're concerned with asking good questions and getting to know your new conversational partner, you'll be the most interesting person s/he has met that entire time. When you focus on your partner, you're making it easier for them to converse with you. You'll find yourself relaxing and enjoying learning about the other person because the pressure is off you to be entertaining or witty. Listen to understand: truly pay attention. Listen for intriguing information. Ask good journalistic questions: who, what, where, when, why, how, tell me about that, etc. and really attend to their answers.

When you do most of the asking, you do most of the learning, as well. You'll discover really interesting things and learn about potential connections that a superficial handshake and card exchange can never provide you. Come to any event armed with good basic questions and a genuine curiosity about others and you'll be the most popular person at the event. Let others shine, and as you do, you'll make friends, create connections and enjoy business success! ✦

Julia Hubbel is a speaker, prize-winning journalist and author of the upcoming book, The Art of Principled Networking: When You Schmooze, You Lose! *She specializes in helping associations transform their retention strategies through building lasting, collaborative relationships. Contact her at jhubbel@frontier.net or 303-903-4815.*

The Need for Institutional Memory

by Susan J. Ellis, Energize, Inc.

One of the most frustrating aspects of change in organizations is that new ways of doing things seem to spring up without any consciousness of what happened in the past. This is particularly relevant to volunteerism, since agencies have high turnover in volunteer program management positions and all-volunteer associations rotate officers with every election. Too often the newcomers initiate change simply because of their own preferences or the wish to establish a "new administration." They fail to ask an important question first: Why and how did we end up where we are now?

No one wants to be immobilized by resistance to change based on "we tried that ten years ago and it didn't work." On the other hand, we are all too busy to reinvent the square wheel or duplicate the hard efforts of predecessors.

Decide what ought to be consistent from year to year and assign the Continuity Officer to watch over these.

The key is to do some research before we set off in a new direction. I suggest that we consider assigning someone the role of "Continuity Officer." This idea would work both for a board of directors and in an agency-based volunteer program.

Boards of Directors

Everyone understands the roles of president, treasurer, secretary and the other age-old officer positions. But Robert's Rules of Order and other traditional references for how to run an organization have missed the boat by not recommending a Continuity Officer to assure that the organization understands its history and why earlier decisions were made. True, the Secretary generally has possession of the meeting minutes book, but how often does anyone ask for a search of historical information? Also, past minutes are often incomplete or hard to search because information is buried within long paragraphs. A Continuity Officer would have the following position description:

- Upon taking office, will read the entire minutes history, including any written policies and procedures. (The very first Continuity Officer might agree to create an index for the minutes and policies, which would help successors enormously. In fact, given today's technology, it might be possible to scan all the minutes into a computer so that word searches for certain topics can quickly be done.)
- When discussion occurs about a subject on which board/group action has been taken previously, make sure the group knows what was done earlier. The point is not to stop discussion! But if the group wants to make a new decision, they ought to do so in the full awareness that: a) they are indeed making a change; and b) they have considered the reasoning of the previous group and feel the situation has changed sufficiently to warrant the new course of action.
- Be the "keeper" of the Policies and Procedures list (those items that do not require any bylaw changes but affect the daily working of an organization), again bringing inconsistencies or changes to the attention of the current leadership. Make note of new policies discussed and agreed to in preparation for the next Continuity Officer.
- Monitor the "passing of the baton" between outgoing and incoming board members. Is there an effective Board Member Orientation process to teach how the organization operates? Are all necessary records transferred from each board member to his/her successor? Has the newcomer been informed about projects underway that will require picking up the reins of leadership?

Volunteer Programs

Volunteer program managers also ought to think about "succession planning." If you were to win the lottery and leave your job, would your replacement know how the program works—and why you set it up this way? This is an important component of a policies and procedures manual, beyond the rules themselves: record the reasoning behind certain decisions made (and date them, too). Organize your files (in cabinets and on your computer) in a logical way so that historical materials can be located easily.

If you take a job in an existing program, value continuity—at least initially—as a sign of respect to both your predecessor and all the volunteers who have come before. Start by talking to longtime participants and comparatively new ones, too. What do they like and dislike? Who made decisions about these things in the past? What led to these decisions? Does anyone know if there is documentation of past actions? You will learn more about this program aspect and begin to understand the reasoning

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Institutional Memory

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behind the present situation. Three options will present themselves:

- ✦ You'll determine that, despite your initial reaction, there is indeed some validity to continuing without a change here.
- ✦ You'll be confirmed in your sense that a change is needed, but you'll be able to find a way to implement it with the participation of those who are most involved. Ideally, they should feel appreciated for their previous work and see the new methods as building on that, not superceding it.
- ✦ You'll discover that no one alive has any idea why something is being done and that you can initiate change without a problem (but based now on good reasoning!).

The Continuity Officer can be a valued volunteer position to advise the staff and to represent views of the various program constituencies whenever change is contemplated. Those who fight the hardest against new things, whether they be volunteers or employees, may wrongly feel that the change is a negative response to their past work. If they can be confident that someone is monitoring past decisions as well as future needs, their resistance will be less. Respect for institutional memory can actually become a form of recognition.

Events and Conferences

The concept of a Continuity Officer has application to major annual events, too. For example, an annual fundraiser or conference tends to be most influenced (rightfully so) by this year's steering committee. But some things ought not to change each year. It can drive patrons, vendors, and volunteers crazy if new procedures, forms, and other details change annually. Besides, if something is announced one year as a new annual activity, it ought to reappear the following year! Too often, no one on this year's committee remembers last year's promise until it is too late. Decide what ought to be consistent from year to year and assign the Continuity Officer to watch over these. ✦

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.

The Universal Principle You Can't Ignore!

by Jay Gubrud

The other day I was driving up to an intersection behind a beat-up red Volkswagen Jetta. Being the car enthusiast that I am, I started making judgments. Because I believe that cars are a reflection of your personality, I started thinking how she doesn't respect herself because her car was covered in dirt, it looked as though it had not been washed in six months. And the car had numerous dents and rust spots all over it.

> *"I am thinking the same thing about you!"*

Then I noticed that she had weird shaped hair—it was formed to have three spikes that shot up three-to-four inches in the air. So, naturally, I started to judge her further. Asking myself what part of society she lives in, what type of people would possibly hang out with a person who looked like this? Then I noticed her hair was three different colors! This confirmed to me that she was totally bizarre and on the fringe of society.

As I sat there and pondered all these assumptions and judgments I glanced down at her bumper, and there was a sticker that read…"I am thinking the same thing about you!" In a moment, I broke out in hysterical laughter realizing what a huge hypocrite I was! While I sat there and placed judgment on her, she was likely doing the same thing about me.

It was one of those enlightening moments that changed the way I approached people. I now realize that the only way I am going to authentically get the best out of other people is by focusing on their uniqueness and strengths, rather than expecting them to be like me. It's one of the universal principles of life. As a result, I have been much more successful at connecting with others and gaining their loyalty. ✦

For over seven years, Jay Gubrud, has helped associations, their boards and members eliminate roadblocks to their success. His theme is unique and one everybody can relate to—cars and driving! You can reach Jay at www.jaygubrud.com or 651-635-9939.

Productivity Tips: Paper Planner Versus Personal Digital Assistant (PDA)

by Laura Stack, MBA, CSP, The Productivity Pro®

Many, many different options exist for tracking your appointments and to-do items. To determine whether to use a paper or electronic system (or a combination of both), you must fundamentally decide two things:

1. Which methods do you prefer? What is your predisposition and your personality?
2. How do you work? Where do you work? What do you need?

Personality and Preferences

Fundamentally, you must first decide if you're a paper or electronic person, because your decisions will largely be dictated by this choice. Paper people, forced to use electronic gadgets (PDAs), may get extremely frustrated. Electronic people will pass out at the mere suggestion that you print out an e-mail.

It doesn't have to be all or none—it is possible to use a combination approach. PDAs are great if you need to retrieve client phone numbers from the road, access large documents (without the bulk) or send yourself reminders. Paper systems are better for reviewing a monthly calendar, taking notes at meetings or planning projects.

Bottom line, if you are a paper person and your organization forces you to use Outlook to allow others to schedule meetings with you, comply, but reenter the information on your planner pages rather than forcing yourself to be a grumpy electronic person who fights with a machine each day.

Go ahead and note your commitments in Outlook if you have to, but copy them or print out the pages to store in your planner if you prefer to carry that with you. If forcing yourself to use something you hate makes you not use it at all, I would absolutely recommend double entry back to your paper system. I do it. I can beat you hands-down finding something using my paper system versus an electronic tool. Not that I'm against them—I just don't prefer it for myself. I like a written to-do list and a visual view of my monthly appointments, so I stick with the planner.

Work Location and Need

Do you work primarily at a fixed-office desk? You can probably conduct most of your work "real-time," without the need to sync to a PDA.

Are you constantly on the go? Portability is the key. Use organizing software to manage your schedule and contacts, then sync to your PDA or print pages for your organizer.

Find out which way works best for you and stick with it, no guilt and no excuses. Here are some advantages and disadvantages of paper versus electronic tools.

Paper Organizer/Planner

Advantages

- You take notes right into your planner. No double entry
- It can't break or run out of batteries.
- You can quickly flip to a month-at-a-glance calendar and view your schedule
- Planner pages and page finders are pretty
- It provides more room to write at meetings
- You can write and look up info quickly versus using the stylus with a PDA
- Customizable. You can add/subtract features and forms that meet your needs
- Yearly planner inserts run about $40; therefore, it's inexpensive to maintain

Disadvantages

- You can lose your planner and have no backup
- You can run out of room in A–Z tabs to write names, addresses, and phone numbers
- You must rewrite information when people move
- It gets messy with frequent updates.
- No security or password required, so others can flip open your planner and view your information
- It can be large and bulky. Smaller versions often don't have enough writing surface and calendar space

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Personal Digital Assistant or Paper?

Information compiled by Mary R. Jordan, EdD, InterNational Electrical Testing Association

National and local periodicals have been featuring articles on hot electronic gadgets, particularly personal digital assistants (PDAs) and PDA-cellphone combinations. CSAE's Communication Committee thought it appropriate to see how Colorado's association professionals and associates are using these devices. 466 of CSAE's professional and associate members received the survey asking, PDA or paper—which one for you? Ninety-five responded with the results nearly neck-and-neck: 47 PDA to 48 paper.

The Case for Paper

Those preferring paper cited lost data with a past PDA, inconvenience, and dread of a time-intensive learning curve as their reasons for not moving toward the electronic devices. Several, however, stated that they use the electronic date books, calendars, and task-minders on their desktop computers in conjunction with printouts for portability. One poor soul must have had a dreadful past-life-experience, stating that PDAs are "the spawn of Satan." Less adamant but more pragmatic responders said, "I can look up or enter data faster than my coworkers who have PDAs" and "I like 'seeing it all' by opening the book."

One person responded that he uses neither, preferring his five-pound portable computer which allows him access to his documents and internet access wherever he travels; in addition, he says, he does not get thumb cramps pecking in messages or need reading glasses to see the screen.

PDA Users

In analyzing the responses, it became clear that differences lay more in the human users than in the electronics. Only seven of those responding (one-sixth of our small sample) seem to use their units to near-maximum capacity while the vast majority primarily rely on the contacts and calendar features. Not surprisingly, those who were most enthusiastic were those using the devices most completely, stating, "I couldn't function without it." Among the features these people most liked were the keyboard attachment which allows the unit to be used as a pocket PC, wireless internet, e-mail capabilities, and integrated cell phones.

As for brand, more than half own a Palm product. Overall, however, their responses did not reveal any more satisfaction than those of owners of the less-popular products.

What Do People Like Best About Their Electronic Data-Keepers?

Portability, compact size, having so much data available in so little space topped the I Like Best list. Also cited consistently was pleasure in the ability to synchronize PDA with the desktop computer. This not only eliminates the fear of lost data but also makes inputting information easier. Several also liked being able to make voice memos. The few who use the integrated cell phone and/or internet services were particularly enthusiastic although some said they dislike the unit's shape.

And the Least…

Those who responded seemed to agree that with a PDA it is more difficult to get information while driving than with a paper planner. Input, unless the unit is synchronized to a desktop or portable keyboard, is awkward and slow. Although small-size is preferred, people do not like the tiny screens, particularly when using the calendar because they can not view appointments for multiple days; people dislike having their calendars show dots or lines to indicate appointments. Some units are difficult to read in low light.

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Other Info

Although the survey did not ask what desktop data manager people prefer, over half those responding, whether preferring PDA or paper, referenced Microsoft Outlook at some point in their answers.

Mary R. Jordan, EdD, is executive director of the InterNational Electrical Testing Association. She can be reached at 303-697-8441 or by e-mail at mjordan@netaworld.org.

Survey Results

The Data:
95 responding
48 use paper (usually in conjunction with desktop computer's data manager)
47 use PDA

PDA Types:

Blackberry/clone	3
Compaq IPAQ Pocket PC	1
Handspring (purchased by Palm)	4
Hewlett Packard	3
Kyocera Smartphone with Palm Software	2
Palm	24
Sharp Electronic Organizer	1
Sony	6
Tmobile Pocket PC	1
Toshiba	1
Visor	1

Making Sense of Document Retention Policies

by Peggy Steif Abram and Adrienne McNamara, Faegre & Benson, LLP

Thanks to the busy shredders at Enron and the legal problems that revolved around the company's destruction of records, more and more businesses, nonprofits, and associations are concerned with implementing and auditing document retention policies.

As an association, you obviously don't want decades of documents hanging around, even in electronic format. They take up space and cost money to store. But associations, just like other businesses, need to meet certain legal obligations regarding document retention. Also, some documents such as contracts will give you valuable legal protection in the future.

Document retention and destruction doesn't need to be scary for most associations.

So what to do? What should you keep and what should you destroy? Here are some practical steps for managing the myriad documents an association creates:

Have a policy. First, there are documents you're obligated to retain by law, such as certain materials related to employment issues, banking regulations, securities law, accounting practices, tax audits and other areas. Second, there are other documents you should retain in the event of disputes or disagreements, such as documents related to contracts.

A thoughtful policy will be based on a thorough study of the laws and issues related to your association and the kind of documents the association creates. By developing a comprehensive policy, you create guidelines for everyone to follow.

Be organized. It does the association little good to retain documents if you can't find them or readily access them. In addition, when you most need them, you are often under substantial time pressure. Part of your retention policy should include detailed guidelines for how documents should be stored and catalogued. You may also want to consider efficient storage mechanisms, such as searchable optical character recognition (OCR) systems, that facilitate document retrieval. Some companies also segregate and catalog certain categories of documents as "high priority" for fast, easy access and extra protection through redundant storage.

Monitor the policy. This means more than sending out annual reminders to staff. You should plan to have counsel conduct a periodic review to make sure that your policy stays current with the various laws and regulations affecting your association. In addition, you will want to conduct a regular compliance audit to confirm that various departments within your association are actually following the policy. (However, even your compliance monitoring should be part of an established schedule—a reminder about document retention policies in the midst of a government investigation, for example, may create an appearance of impropriety, as Arthur Andersen discovered in court.)

Don't apply the policy blindly. Your policy shouldn't override your business judgment. For example, you may wish to carve out a special section in your policy in connection with major transactions or contracts, and retain even more documentation than your policy would otherwise dictate, such as earlier drafts of a document or other supporting materials to clarify any language that may later be subject to questions or conflict. When you're facing a significant event of any kind for your association, think about the records you want to keep—paper and electronic—and what you may need in the future.

If you see a dispute coming… stop! At the earliest indication that an issue may be subject to dispute, litigation, or a regulatory investigation, make sure you suspend any standard policies regarding document destruction. Err on the side of caution: pull the plug on the shredder for everything related to that issue. Regardless of the terms of your retention policy, you'll face tough sledding in court if you continued to destroy potentially relevant documentation after questions arose.

Document Destruction

One of the goals of a document retention policy is to keep your files clean, organized and accessible. That means you and your employees will need to spend time on a regular basis getting rid of documents that, under your policy, you don't want or need to retain. But you should also remember a couple of key principles related to document destruction.

Security counts. Keep in mind that there may be documents your association creates that you should not feel comfortable simply dropping in the trash. Even something as simple as outdated letterhead, for example, could be retrieved and used for inappropriate purposes by outsiders. It's often safer to take the time to destroy records that you wish to toss. Obviously, if the documentation includes private or confidential information, it should be thoroughly shredded before disposal.

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Productivity Tips

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- ✦ It's often overflowing with assorted papers and sticky notes

Electronic Organizer/PDA/Palm Pilot

Advantages

- ✦ It's lightweight, small and portable
- ✦ A PDA can hold thousands of contact names and numbers
- ✦ It has a search capability to find tasks and contact names
- ✦ It's always current when "synced" with desktop computer
- ✦ It's perfect for frequent travelers
- ✦ A PDA integrates with Outlook and popular contact management databases
- ✦ You can access your e-mail if your PDA has wireless capability
- ✦ You don't run out of room to list today's "to-do" list
- ✦ You don't have to re-write to-do lists when you don't complete items; they roll forward automatically

Disadvantages

- ✦ There is no month-at-a-glance view. You must click on individual days on a monthly calendar to see appointments for that day
- ✦ Note taking is tedious and time-consuming with cryptic shorthand or you must carry a separate keyboard
- ✦ It requires the use of a pad of paper to take notes, which must be typed into computer a second time at home base—double entry
- ✦ You can't carry papers and notes in it for a meeting
- ✦ It's an expensive machine with add-ons
- ✦ You risk crashes, data wipeouts, and being on the road without your calendar

Feel free to create your own customized system that best meets your needs and fits your personality. Just as you are unique, so too are your organizing needs. Experiment with different techniques and tools. Don't purchase the latest gadget just to "keep up." Stick with what works for ***you***. ✦

Laura Stack, MBA, CSP, The Productivity PRO® is author of Leave the Office Earlier, *to be released in spring 2004 by Broadway Books. She is a director of the National Speakers Association, www.NSASpeaker.org. Stack can be reached at 303-471-7401 or visit www.TheProductivityPro.com*

Document Retention

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Getting rid of documents is hard. Most associations create a blizzard of paperwork—phone records, internal memoranda, e-mails, voice mails and assorted "cubicle trash." Purging such material is difficult enough in a hard copy world—but electronic copies, of course, are almost impossible to destroy. And those are just your copies. Any time you involve third parties, whether it's another party in a transaction or simply someone to whom you forwarded an e-mail, you lose control over the destruction and distribution of a document. So just because you destroy a document—either in paper or electronic format – don't assume it's gone for good.

Document retention and destruction doesn't need to be scary for most associations. The key is to develop and implement a policy tailored to your needs. And the result will be much better control over the knowledge and information your association creates. ✦

Adrienne McNamara represents associations and other nonprofit organizations at the law office of Faegre & Benson in Denver. Peggy Steif Abram is a partner in corporate finance at Faegre & Benson in Minneapolis. They may be reached at amcnamara@faegre.com or pabram@faegre.com.

New Members

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Here's the CAE question of the month…

An association has decided to mount a campaign to inform the general public about its mission. Which of the following approaches will most likely help the association to achieve this goal?

A. Developing a budget and then a course of action
B. Establishing a speakers' bureau using volunteer leaders
C. Ensuring that the mission is clear and relevant to the general public
D. Contracting with a video production company to produce public service announcements

Answer at bottom.

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

Correct answer is C.

Member Profile: Meryl Glickman, Marketing Communications

by Mo Goldman, ConferenceDirect

Meryl Glickman has now belonged to CSAE and ASAE for almost a year. Meryl is a self-employed marketing/management consultant with more than 20 years of strategic and tactical marketing and communications experience encompassing branding, media, research and more.

In describing her work style, Meryl says "I work collaboratively to create bottomline results through the design, research, implementation, and evaluation of aligned strategic marketing, business and communication plans."

Meryl received her bachelors degree in Social Sciences from State University of New York at Stony Brook, a Masters in Special Education from University of Southern California and an MS in Marketing from University of Colorado at Denver. Of her many work accomplishments, she is especially proud of three recent CSAE Membership Awards for year-long integrated campaigns for Medical Group Management Association (MGMA).

A true New Yorker, Meryl was born in Manhattan, raised in Brooklyn and grew up in Queens. A Denver resident since 1975, Meryl and her husband, Mark, a computer program recruiter, are the parents of five adult children, four of whom were in college at the same time! She is also mom to Molly, a mischievous, mostly golden retriever who likes to gnaw on shoes.

Meryl is a world traveler—having been to South America, Europe, Asia, the Middle East, Africa, the Caribbean, Central America, Canada and of course, the United States. She even has a national parks passport! And wherever she and Mark go, they check out the local hot springs together. Sports interests include yoga, biking, hiking, snowshoeing and skiing. And as the daughter of artistic parents, she has a "house filled with eclectic art."

Want to talk to Meryl about how she can help grow your business or pick-up a particular project that you just can't get to? Contact her at 720-748-8400 or mgmarcom@msn.com ✦

Tech Tip: All About Fonts

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.

Fonts are used to display text on the screen and to print text. A font, such as *Times*, is the name of a typeface. Fonts have font styles such as italic, bold and bold italic. The three most common font technologies are Outline, TrueType and Vector fonts.

TrueType and the new OpenType fonts are outline fonts that are rendered from line and curve commands. Both can be scaled and rotated and look good in all sizes and on all output devices. Type 1, by Adobe, is an outline font that is designed to work with PostScript devices.

Vector fonts are rendered from a mathematical model. They are used primarily with plotters. Characters are drawn in arrangements of line segments rather than patterns of dots and can be scaled to any size or aspect ratio. The three vector fonts are *Modern*, *Roman* and *Script*.

Raster fonts are designed with a specific size and resolution for a specific printer and cannot be scaled or rotated. If a printer does not support raster fonts, it will not print them. The five raster fonts are Courier, MS Sans Serif, MS Serif, Small and Symbol. Raster fonts are also called bit-mapped fonts. ✦

February Luncheon

Coordinated Communications

Is technology always the answer, when and how should we use e-mails vs. telephone, vs. paper based communication with our members/ potential members? Is there a way that all methods can be coordinated and work with each other vs. against each other? Come and hear solutions, suggestions and recommendations from the experts who have learned "the hard way."

Do you have specific questions? Don't hesitate to e-mail your concerns to JT at joant@csaenet.org. Our panelists will review your questions and incorporate your questions into the presentation.

Moderator:
Brigid O'Connor, MBA
At Ease, LLC

Panelists:
Brenda Hull, MS
Director of Communications
Medical Group Management Association

Lauren Schadle, MBA
Group Director, Marketing and Communications
Financial Planning Association

Becki Swinehart
Assistant Director/Publisher
Museum Store Association

When: Friday, February 6, 2004

Where: Hilton Denver Tech South
7801 E. Orchard Road
Greenwood Village, CO

Directions: Take I-25 to the Orchard Road Exit (Exit number 198). Turn west onto East Orchard Road. Hotel is on north side of Orchard

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

Cancellation deadline: 2/4/04

All unfilled reservations will be billed the registration fee, plus an additional $5

CSAE Registration Form

All registrations must be accompanied by payment. **February**

Names ______________________________

Association/Company ______________________________

Phone ______________________________

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

Luncheon Fee ❒ $30/member ❒ $35/nonmember

Alternative Luncheon Plate ❒ Fruit Plate ❒ Vegetable Plate

Total amount due $____________

Method of Payment ❒ Check ❒ AMEX ❒ Visa/MasterCard

Name ____________________ Number____________________ Exp. Date __________

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