

# Executive Memo

December 2003

Focus on Planning for  
the New Year

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## What's New in the World of Associations?

by Fred Caruso, Caruso Group International

Cell phones, fax machines, video tapes, CDs, DVDs, desktop computers, laptops, PDAs, SARS, AIDS and international terrorists—those are just a few of the things that didn't even exist when I got my CAE designation at ASAE's New York City convention 30 years ago. The world has changed a lot since then and so have associations, even though they may look the same by all outward appearances. How we manage associations as their chief executives on a day-to-day basis has changed big time! Here are some of the differences that may not be so obvious to the present day observer.

Convention attendance and, most notably, its continued growth trend over the years, was considered a sign of administrative success and weighed considerably on the application for CAE. Presumably, if you did a good job of managing the association, people came to the convention. Now, we know other factors far beyond the influence of the executive or the committees dictate attendance patterns. Failure to second guess attendance today can lead to catastrophic financial consequences. Hotel attrition charges have broken more than one organization in recent years.

Membership growth was a similar indicator success. A good manager produced steady and annual increases in membership...no matter what. Some associations are declining due to universal economic consolidation, a factor totally beyond the control of the management regardless of how much wishful thinking is applied to the formula. Many association universes are shrinking and, unfortunately, will continue to do so!

*Time* magazine ran a cover feature in August 1986 entitled, "Americans are Running Out of Time" and devoted at least ten pages to America's changing social patterns. Pressures for our time and attention has grown far more intense in the 17 years since. When it comes to conventions, we have many more options available to us for satisfying the traditional benefits of those massive gatherings: the desire to travel, the desire for indulgence and the need for information, to name just three. We still need our colleagues, but is it necessary to spend thousands of dollars and a week of travel/meeting time away from friends and family? Are there other options?

The need for networking and to share ideas with the best in the field were always at the top of the list as motivators for membership. People used associations as their venue of choice and, in many cases, the time-honored trade association or professional society was the only game in town.

Now, we are a society of diversity, options and choice. The medical societies have given way to dozens of specialty groups. It is no longer enough to be known broadly as a professional. Identity goes more precisely with the specialty area, regardless of the endeavor, making the larger general gathering far less attractive.

When it came to education, associations were about the only source for specialized information after training. Members were happy to have the option and employers were very willing to pay. Overall, 30 years

## Executive Memo

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## President's Message

### Changing for the Better

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



The beginning of a new year signals the need for making plans and often taking new directions. To remain vital, associations must respond to the ever-changing environment in which they operate.

Among those who have written extensively about change both on a personal and an organizational level is William Bridges, author of such books as *Managing Transitions: Making the Most of Change*. As the title suggests, he differentiates between changes which are external and often occur quickly and transitions which are internal and often take place over an extended time. For changes to be successful, he says, they must be accompanied by transitions.

Bridges states that there are three phases to transitions. The most obvious is the third, a new beginning. But each new beginning must be preceded by an ending and an in-between experience called the neutral zone. It is a mistake, he says, to overlook those first two phases and jump straight to the new beginning.

In recent years, many organizations have changed to a greater emphasis on electronic communication. In many cases, paper newsletters have ended as online versions began, live phone contact has given way to phone menus and face-to-face meetings have been replaced by electronic forums.

In making such changes, it can be useful to look at the personal contact that is lost and consider ways of replacing it. For example, the final issue of a newsletter could provide a retrospective. Or, while the business of an organization might be conducted electronically, it could be helpful to continue to provide networking opportunities through member socials. In these ways, transitions can help to make change successful.

Similarly, the Colorado Society of Association Executives has made changes in programs and membership benefits. To support the transition to these new features, efforts are under way to create a branding and marketing program. We are bringing in the best from the past, helping it evolve and creating a new beginning. The result, we expect, will be a change for the better. CSAE strives to keep up to date for its members by monitoring the association environment and responding accordingly.

I welcome your comments. Please contact me by cell phone at 303-887-2886 or e-mail at raquel@coloradoafp.org.

*Raquel Alexander, MA, CAE*  
*CSAE President*

## Why CSAE?

Creating networking opportunities

Serving educational needs

Advancing your profession

Enhancing the community

Your career deserves it

## Looking at Time Through the Lens of Leadership

by Laura Stack, MBA, CSP

**Y**ou juggle projects, staff, meetings, committees, board issues and member complaints, to name a few. When you manage time well, things speed up; when you don't, things slow down. Things that keep you from spending time productively are called "speed bumps." They slow you down, waste your time, interfere with your objectives and create productivity "leaks." Here are some speed bumps common to association executives:

1. **Politics.** A committee chair gets upset about a particular issue and e-mails you a complaint. She copies the entire board of directors, executive committee and association staff, which creates a flurry of responses and a big waste of your time.

**Solution:** Invite new committee chairs to a leadership breakfast at each annual convention. Review a "Code of Conduct," which explains the etiquette in dealing with future problems. Phone the member and ask her to contact you personally with future issues.

2. **Delayed Decision-Making.** Associations are set up to be slow moving. The end product is usually fabulous because an entire team has put time into the decision. However, it is not the quickest way. If you were all by yourself with no one else to consider, you could probably complete your work in 30 minutes a day.

**Solution:** Master the art of "executive decision making." Some associations are staff-centered, others are board-centered and still others are committee-centered. Once you understand the culture of your particular association and have established trust, you will learn what kind of leverage you have. You can then move quickly and make executive decisions when necessary.

3. **Not Involving Your President.** Trying to get information from volunteers can be incredibly frustrating. When they commit to a key objective and don't deliver, you either hear, "It's not my job," or they hold information tight to their chests. Then you risk being late in delivering the goods.

**Solution:** Let the president know what's happening right away, so she or he can intervene and you won't step on any toes. You don't want to get members angry with you. At the same time, your contract should stipulate that you have the sole responsibility for hiring and firing staff, so you can take any personality issues out of the equation.

4. **Wasting Time at Meetings.** Some controversial issues require inordinate amounts of discussion at meetings.

**Solution:** Give the board a "heads-up" on touchy issues to prevent a lengthy conversation at the next meeting. Stacy Tetschner, executive vice president of the National Speakers Association, writes a "Monday Morning Memo," outlining a particular issue. People respond to him directly and he distributes the compiled results that Friday.

Joan Tezak, executive director of CSAE, writes a monthly board report, listing all upcoming meetings, updates on strategic initiatives, financial position with cash flow projections, complaints, accolades, office issues and the status of different projects.

Lastly, save time discussing FYI items with a consent agenda, which lists items for approval that don't require discussion.

5. **Incongruity of Strategy and Operations.** The mission and vision of the board isn't effectively communicated to the staff, so they put time and effort

into meetings, committees, publications and programs that don't support the strategic goals of the organization.

**Solution:** Since you wear strategy and operations hats, the responsibility to ensure congruency falls on your shoulders. Create an "Operational Plan," which shows from top to bottom how the staff's work supports the mission of the organization. Eliminate programs that don't support it. Tradition is great, until it no longer serves a purpose.

6. **Forgetting Your Role.** You're the only one who knows how to fix the copier machine and change the voicemail for the answering service. As you've risen in the ranks of the association, you've added more and more hours of work to your schedule each week.

**Solution:** In the past, you have demonstrated exceptional ability in implementing key strategies and objectives to get where you are. You can no longer be the only one who knows how to do it, solve it, or fix it. You will find yourself working 75 hours a week if you don't shift your focus. Stop working on your "occupational hobbies" and focus on the greatest return on investment in *you* as a leader, not a worker.

Determine which of these speed bumps is affecting your productivity and take steps to prevent them. These contingency plans, implemented as a preventive measure, will cut down on future losses of time. ♦

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## What's New In Association Management

*Continued from page 1*

ago meeting costs tended to be a lot more moderate compared to the overall cost of living. Today we can hardly make ends meet, and there are thousands of trainers and professional speakers offering their services. They are marketing directly to specific fields, not to mention the number of nonassociation-owned trade journals that provide education programs to supplement their incomes.

## Where Do We Go From Here?

So, what can we as association executives do to accommodate the new realities of our environment? Should we be looking for another career?

Associations have actually grown in number. The need for them is as strong as ever. The fundamentals are pretty much the same, but the tools of the trade have to change to accommodate the new universe and the association executive is at the helm when it comes to most of those changes.

Conventions, for the most part, have to be shorter, cheaper and more content oriented. Many organizations have gone to having an abbreviated event. Some skip a year or combine with other groups. They have accepted the fact that hiring expensive big-name speakers will do little more than create the temporary illusion of success while the foundation continues to erode.

Education must be packaged in cheaper, more convenient means, such as lunch-and-learn audio conferences, combination Internet and telephone lectures, or evening mini-seminars. Of course, the subject matter will dictate many venues, but little will overcome the obstacles of the lack of ability to spare the time, the unwillingness of employers to pay the freight, or the unwillingness of attendees to make the trip on the given day of the scheduled event.

Traditional newsletters were the cornerstone of association communications. My entry into association management came through journalism. Now, many people send publications direct to the waste basket without even a thumb-through. Electronics are not only faster and cheaper, but they meet the

changes in social style: we want our information on our terms, when we want it, 24/7, and if we want to print it, we will print it ourselves. Save a tree, we say.

Sophisticated data management 30 years ago meant owning a behemoth of a metal-plate addressograph machine that featured color-coded metal flags that might allow you to separate out certain committees or subgroups. Now we need to manage data in order to meet every special need or contingency. Our members have become more real human beings, as opposed to just a name on a mailing list and we all like it that way.

Legislation and regulatory affairs has become one of those areas that has grown enormously in value to members. We have found ourselves with less time to devote to abstract matters and sorting out the meaning of subtle bureaucratic proposals. The association's management and leadership are delegated that duty. The responsibility for communicating the meaning of legislative affairs in a short, concise way to the membership falls on the association executive. We have to apply every new tool available to the lobbying game, including the use of on-the-fly conference calls to obtain immediate consensus and feedback, e-mail, cell phones, faxes and video reports.

Globalization and economic consolidation have had profound effects on the association environment. Big companies are buying out small ones, in many cases, gobbling up our members and placing restrictions on their employees that supercede any appeals the association many make. Whole industries have been wiped out (witness the independent office supply dealer, local hardware dealer, or even the independent pharmacist). Those who remain still need what associations provide, but lack the critical mass for financing services and activities in the way they were done years ago. With economic consolidation comes lower consumer prices, wider ranges of consumer choice and a greater consistency of service, but at a very high price to the association world. We just can't sustain business as usual.

Our inclination to travel anywhere, at any time and the fact that it might cost less at any

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## What's New In Association Management

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given time to go to Frankfurt, Germany, than to Washington, D.C., has made us all more accustomed to the pleasantries of cultural diversity. It has also made us very much aware of the reality that Americans work more and have less vacation time than the rest of the modern world (by as much as three-to-four weeks a year) and, in fact, may be earning less money for the same job in terms of buying power. We work like heck and, unfortunately, many association activities that are aimed at enhancing our careers seem very much like even more work.

The new crop of association executives, mostly new generation types, probably roll with the waves better than us old timers, not knowing they are operating differently than they might

have in the past. Their challenge, however, is in dealing with those within the membership who refuse to see what has happened to their own environments. Until recently, we had members who would have returned to the 1950s if there were any way possible. There are fewer of those left, but there are plenty out there who want to go back to something that no longer exists.

The association executive today has to be prepared to lead; to educate the core association leaders; to use technology to provide the essentials of education, communication, information and networking as cheaply as possible; and to handle more jobs well. Simultaneously, we must resist the tendency to internalize the decline of participation as a personal failure when it may well be just the result of social change.

While all this has happened, associations remain as they were 30 years ago. An association is a medium of communi-

cation of high social value, an extension of man's desire to improve conditions, to serve his fellow man and, in fact, is an extension of man himself. The environment has changed, therefore it is understandable that the medium has changed. The association executive remains its manager and our methods have changed, or they will change in the not so distant future. ♦

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*Fred Caruso, CEO, of Caruso Group International, is a career association executive, having worked with organizations of every kind at every level. More than half of his 35 year career has been devoted to work within the association management company environment, allowing him exposure to many more different types of organizations and their affiliates. He holds a journalism degree from the University of Montana and completed two years of graduate studies in the sociology of work.*



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## Realizing Success—Performance Measurement in Associations

by Bob Harris, CAE

Associations plan a multitude of activities, projects and programs. At their conclusions we often hear volunteers discussing successes and failures. *“That was a cutting edge topic—we should always pay top dollar to bring in the best speakers.”* Another member asks, *“How much money did we make, wasn’t that our goal?”* While yet another states, *“Remember, the aim was to enroll new members...how many did we get?”*

In this instance, each volunteer views the project with a different purpose: education, making money, enrolling members. The example supports the need for applying simple performance standards to association, chamber and foundation programs.

For-profit companies measure inventory, net profit and stock value. Nonprofit organizations are traditionally less precise—we measure good feelings, influence, financial reserves and member retention, for example.

The process of applying performance measurement is to determine and agree at the start of a project how outcomes will be judged. Set one or two standards against which to measure success.

### The Strategic Plan

The umbrella of performance measurement is the organization’s strategic plan. It chan-

nels activities, guides volunteers and staff, and serves as a roadmap for achieving the mission and goals. It should be integrated with the budget, committees and the staff business plan.

Although the strategic plan describes major goals, it is too broad to provide performance measurement for every association project.

### Selecting Performance Criteria

The need to agree upon desired outcomes is important for realizing success—even more so for volunteer and committee-driven projects.

The *Performance Criteria Chart* offers standards and ideals for a number of programs. Use the chart to discuss and set criteria for measuring outcomes (additional criteria can be added and not all principles apply to every organization). When a project concludes, whether it is the annual budget, an educational session, or a membership drive, there will have been agreement among volunteers and staff as to how success was to be measured. ♦

*Bob Harris, CAE, offers nonprofit management tools at [www.nonprofitcenter.com](http://www.nonprofitcenter.com). He conducts strategic planning, leadership orientation and staff training. Contact him at [bob@rchcae.com](mailto:bob@rchcae.com)*

## Performance Criteria Chart

The chart offers various considerations and principles for activities and programs in nonprofit organizations. The process is to discuss and set performance criteria against which to measure success, at the onset of planning. Not all criteria will apply to every organization and some organizations will customize criteria.

### Meetings

- Number of Registrants
- Sponsorship Income
- Attendee Satisfaction (Surveys)
- Net Profit
- Resulting Publicity
- Trade Show Booths
- Prospective Member Attendance

### Membership

- Ratio of Members to Prospects
- Recruitment and Retention Rates
- Allocated Budget Line Item for “Membership Development”

### Diversity

- Leadership and Membership Diversity
- Adoption and Use of a Diversity Statement
- Perceived Image by Various Audiences
- Inclusivity Efforts and Programs

### Committees

- Number of Standing Committees
- Effectiveness of Task Forces
- Process for Charging Committees with Goals
- Alignment with the Strategic Plan
- Staff Role on Committees

### Strategic Plan

- Plan is Current and Reviewed Annually
- Strategic Plan Report on each Board Agenda
- Plan Translated into an Action or Staff Plan
- Publicity for the Plan and Member Awareness of Mission and Goals
- Use of a Plan-Champion
- Integration with Budget, Committees, Structure

### Communications

- Timely Delivery and Receipt
- Content Quality
- Distribution Methods (e-mail, fax, online, mail)
- Cost-to-Value Ratio

## Performance Criteria Chart

*Continued from page 7*

### Technology

- Web Site Usage, Purposes and Funding
- Income Generated by Web Site
- Licenses and Security, Policies on Software, E-Mail
- Safeguards and Back-Ups

### Governance

- Board Size, Transition, Terms
- Length and Effectiveness of Meetings
- Accountability, Follow-Through, Enforcement
- Self-Assessment by Board
- Agendas, Consent Agenda and Minutes

### Documentation

- Staff Documents Responsibilities as Job Performance Requirement
- Operations Manual, Policy Manual, Personnel Manual
- Record Retention Schedule Adopted
- Leadership Development
- Nominating Process
- Leadership Development and Orientation
- Effective Recruitment
- Board Culture, Sacred Cows
- Board Commitment or Pledge Form

### Risk Management

- Risk Management Understood by Board and Staff
- Legal, Insurance, Accounting Professionals Available
- Antitrust, Apparent Authority, Public Disclosure Understood
- Appropriate Insurance
- Disaster/Emergency Communication's Plan
- Local, State and Federal Filings

### Organizational Structure

- Subsidiaries (PAC, Foundation, For-Profit)
- Chapters Not a Liability to Parent Organization
- Chapter Affiliation Agreements Used

### Benefits, Services

- Portfolio of Benefits Offer Significant Value
- Golden Handcuff Benefit
- Three-Way Test for Endorsing Programs—Need, Unique, Income
- Information Transformed into Tangible Benefits
- Non-Member Access at Higher Fees
- Benefits Priced Appropriately for Members and Non-Members

- Protection of Intellectual Property. Confidentiality, Copyright
- Endorsement Agreements

### Finances

- Dues to Non-Dues Ratio
- Reserve Goals Set and Met
- Operating Ratios Compared to Similar Organizations
- Comparative Staff Compensation for Region and Responsibility
- Unrelated Business Income Tax
- Policy on Annual Audits
- Treasurer's Orientation and Information Access

### Collaboration

- Partnership Programs, Sharing, Cooperation with Allies
- Partnerships to Best Position Organization

### Image

- Style Manual
- Focus on Branding Organization and Products/Programs
- Copyrighting, Confidentiality Understood
- Press Releases Distributed Regularly
- Logo Protected and Properly Used
- Tagline Adopted; Mission Statement Promoted

### Operations-Assessment

- Operating Ratios, Policies Used for Benchmarking
- ISO 9000, ASAE Peer Review, Internal Evaluation Methods
- Board Performance Assessment
- Staff Assessment
- Legal Review Conducted Periodically

### Input—Surveys

- Survey Effectiveness, Frequency of Surveys and Focus Groups
- Understanding Member Challenges, Needs, Expectations

The Performance Criteria Chart is available electronically at [nonprofitcenter.com](http://nonprofitcenter.com).

## Legal Briefs:

# U.S. Ratifies the Madrid Protocol—What it Means for Trademark Owners

by Adam Lindquist Scoville—column edited by Adrienne O. McNamara

On November 2, 2003, the United States, by ratifying the Madrid Protocol, joins the Madrid System for the International Registration of Marks. The Madrid Protocol provides a simple and economical means of obtaining international trademark protection by allowing a U.S. trademark owner to file an application spanning several countries through the U.S. Patent and Trademark Office (USPTO). Sixty countries will be members of the Protocol by the end of the year.

U.S. nonprofits and trade associations that use their marks abroad or online may find foreign trademark protection feasible, where it once was prohibitively complicated and expensive.

### Operation of the Madrid Registration System

There are two ways to apply for an International Registration—at the time of filing an application in their home country, or at any time, on the basis of an existing registration or a previously-filed application. U.S. applicants can opt for protection in any country that is a party to the Madrid Protocol. The Protocol also provides for extending the geographic scope of an existing International Registration to additional countries at a later date.

Upon receipt of the international application, the USPTO forwards the it to the International Bureau of the World Intellectual Property Organization (WIPO), which notifies the national trademark office in each country designated in the application. Each trademark office has either 12 or 18 months to examine the application under its own trademark law. If accepted, an International Registration is granted for ten years and may be renewed in all countries with a single filing.

### Main Features of International Registrations

An International Registration gives no new legal rights, but is equivalent to a bundle of national registrations that can be administered en masse in the designated countries. Thus, each national trademark law determines, country by country, the scope of rights that the registration provides.

For an initial period of five years, however, the International Registration depends upon the basic application. If the basic application is rejected before registration, withdrawn, cancelled or abandoned, partially or in its entirety, the International Registration is likewise entirely or partially invalidated.

### Advantages and Disadvantages of the Madrid Protocol

The Madrid System provides administrative simplicity in managing a portfolio of marks. Another key benefit is that the trademark owner can avoid hiring foreign counsel in each country, unless the application is refused by a foreign trademark office or opposed by a third party in another country. Moreover, because international applications may be rejected, if at all, only within 12 or 18 months, applying internationally may be much quicker in countries where examination can now take several years.

On the other hand, in cases where the mark would be registrable abroad but not in the U.S., using the Protocol may offer fewer rights than filing individual foreign applications. Because the International Registration depends on the original U.S. application, international protection will be cancelled if the mark is unregistrable in the United States, even if it would be registrable abroad.

Lastly, the United States trademark register is one of the most crowded in the world and a prior user may already have staked a claim to a confusingly similar mark. Again, individual foreign applications might succeed, while the underlying U.S. application might cause an International Registration to fail. Furthermore, the Madrid System will make it easier for foreign applicants to obtain rights in the U.S., increasing the risk that a U.S. company will be forced to contend with conflicting trademarks owned by foreign entities.

Benefits and traps for unwary U.S. trade associations, small and large, that operate overseas or online should be alert to the new opportunity to take advantage of the Madrid Protocol for a relatively simple and flexible extension of trademark protection in their foreign markets. Even purely domestic associations, however, should be increasingly vigilant for uses of their marks by foreign companies in the U.S. and on the Internet, lest they find themselves unable to obtain protection, even in their own backyard. ♦

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The information in this article is informational only and is not intended as legal advice.

## Use Your Web Site to Maximize Your Marketing Efforts

by John Gunn, CEO, John Gunn Marketing Partners

If you still view web marketing as the electronic equivalent of your print promotional collateral, chances are you're missing untold opportunities to capitalize on the Internet's value as a vital communication channel. Here are several ways you can begin using this dynamic tool to implement a variety of marketing activities and strengthen your association's market position.

**Understand Your Audience**—Providing high-quality and relevant content is the cornerstone to attracting viewers and encouraging repeat visitation. Use results from your association's member research, product evaluations, application forms, membership demographics, industry trends analysis, and even anecdotal conversations to help ensure the content you offer is valuable to current and prospective members and customers.

**Shape Visitors' Experiences**—Make it easy for members and other visitors to find what they want, as well as what you want them to see or purchase. Be strategic in how you direct visitors through your site and consider conducting usability studies with a sample of your members to ensure your site navigation is intuitive and clear.

As a general rule, visitors click three to four times before becoming frustrated and abandoning a search on your site. By asking your members to complete several search tasks for critical information on your site, you can gauge the ease with which visitors find desired information.

**Communicate Your Brand**—Beginning with your home page and continuing throughout your site, make sure your association's core brand message is clear and apparent to all visitors. Ensure the messages, graphics, content, navigation, special features and products offered work together to reinforce the desired brand image and communicate the unique value proposition you offer.

**Keep It Simple**—Fast speed and easy-to-read content helps visitors mentally download information quickly and encourages longer user sessions on your site. Write for the web, keeping verbiage concise, action-oriented and packed with useful information. Keep type sizes large enough for an aging population to see and read quickly, and avoid background colors, shading and graphic designs that compete with text and decrease readability.

With the exception of articles and substantive content, attempt to keep pages to lengths requiring minimal amounts of scrolling. Avoid unnecessary graphics and features that slow downloads and click-throughs, helping members quickly surf your site to find must-have information and the services you sell.

**Optimize Your Visibility**—Your web site provides an effective 24/7 storefront for the services you wish the world to see, but only if users can find you. Approximately 90 percent of web users begin surfing by using search engines, resulting in hundreds of millions of searches each day on Yahoo!, Google, Ask Jeeves, MSN, America Online, Alta Vista and others. Because visitors seldom read past the second page of search results, take steps to ensure your association's site lands near the top of the list for search results with keywords your members and prospects are most likely to use.

Keywords drive search engines and you must understand the top-of-mind words people associate with your organization. Once known, these keywords should hold prominent positions in your content, page titles, descriptive META tags, headers, ALT-attributes and other opportunities to embed keywords into your site. Design with keywords in mind, as search engines use automated programs called "spiders" to scan sites and read HTML coding to complete search requests and rank results.

With a design strategy in place, register your site with top search engines like Open Directory (which feeds Netscape and Lycos), Yahoo!, Google and others. Reciprocal links and your association's presence in online directory listings further elevates your ranking in search results. Also, be sure to purchase all domain names relating to your organization as a safeguard against misdirecting potential visitors away from your site.

**Give Members Good Reasons to Visit and Return Often**—Encourage members and customers to visit often by improving the utility of your site. For members,

*Continued on page 10*

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## Tech Tip:

### Pause a PowerPoint Presentation

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](mailto:timblum@rmel.org).

Have you ever needed to stop during the middle of a PowerPoint slideshow? Want the audience to focus on the presenter rather than the screen? Try “pausing” the slideshow. Pausing a slideshow is nothing more than simply turning the screen black and hiding the presentation slides. To turn the screen black, just press the letter ‘B’ on the keyboard. When you’re ready to resume, just press ‘B’ again and your slide will reappear.” Want a white screen rather than a black screen? Press ‘W’ to turn the screen white. To resume the show, press ‘W’ again. When you are ready to finish your show and are at the last slide, press ‘B’ to turn the screen black. After the audience files out, press Esc to stop the slide show. ♦

## Web Site Marketing Efforts

*Continued from page 9*

the ability to make changes to membership records online, download newsletters, register for events, search and post jobs, network on listservs, purchase books, and access member-only services and information can become the draw that encourages repeat visitation. For nonmembers, online clearinghouses of industry-specific statistics, news and links can become added-value features to keep them coming back for more.

### Explore Your E-Commerce Options—

According to the American Society of Association Executives (ASAE) 2001 research report on e-business among nearly 800 association respondents, more than two-thirds (69 percent) offer secure servers for e-business transactions and 54 percent offer “members-only” sections on their sites.

These associations also find value in using their web sites to promote products and services (69 percent), process membership applications (67 percent), offer online education (67 percent), help members network (67 percent) and process event registrations (15 percent). They also provide online membership directories (63 percent), product catalogs (49 percent), career centers (34 percent) and webcasts (15 percent).

Most of these organizations process e-commerce orders in-house (83 percent), fulfill orders in-house (80 percent) and collect payments online through their web sites (56 percent). They view the Internet as an important (33 percent) or very important (57 percent) way to communicate with members and on average devote six percent of their overall expense budget to technology and one percent to e-commerce.

**Learn from Your Competition—**Keep an eye on competition by visiting their sites often. Creating a matrix of features and benefits to check periodically will ensure staff tasked with this responsibility are thorough and consistent in their reviews. Your competitors’ sites will reveal to you the brand they aspire to

communicate, the brand they currently communicate, and a variety of marketing information about strategic directions, budgets, staffing, members, customers and other market intelligence that can guide future decisions about your association’s site, positioning and business strategies.

**Gather Market Intelligence—**According to the ASAE report, 44 percent of association respondents say they conduct member research through their web sites, and more are likely to do so as the cost of online surveying and polling technologies continue to decrease. Begin capturing contact information on site visitors by creating numerous opportunities for visitors to send e-mail requests to you and subsequently provide you their e-mail addresses. By offering free subscriptions to e-newsletters or access to other free information, you can begin identifying new prospects for product sales and membership.

Often overlooked and undervalued, your association’s web tracking reports reveal a wealth of information about how visitors arrive at your site, where they enter, what they see, the amount of time they spend and where they exit. Studying your web traffic and trends can help you enhance navigation and content while supplying potential banner advertisers with statistical proof of the visibility opportunities offered through your site. ♦

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*John Gunn is the CEO of John Gunn Marketing Partners, a strategic marketing consulting firm specializing in market research and analysis, marketing strategy and planning, brand development, membership and product marketing and marketing assessments for trade and professional associations of all sizes. For more information, contact the author at 703-979-9223, [jg@GunnMarketingPartners.com](mailto:jg@GunnMarketingPartners.com) or visit [www.GunnMarketingPartners.com](http://www.GunnMarketingPartners.com)*

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## Colorado Chiropractic Association Honored

Each year the American Chiropractic Association (ACA) holds a competition that gives state chiropractic association and societies the opportunity to win recognition for excellence. Plaques are given for best journals, best newsletters and best web sites in each category.

The Colorado Chiropractic Association is being honored in the following categories by ACA: (Newsletter) Best Single Issue; (Newsletter) Best All-Around Volume of the Year; and (web site) winner in the category of 500 to 1,000 members.

Congratulations to Karen Hammel, CAE, executive director and Vineta Campau, communications director of the Colorado Chiropractic Association. ♦

## New Members Professional Members

### Julie F. Bowerman

Executive Director  
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### Chelsea Mundy

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## Associate Members

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### Brittney Dilges

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## Affiliate Members

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## Ten Things Kids Think Are From the 'Olden Days'

by Jim Carroll

One of the most important roles of the association executive today is ensuring that the organization and its members are prepared to cope with the sweeping change that is occurring around them.

Everyone is faced with rapidly evolving business models, new and unique customer demands, heightened competition, rapid product development and even faster product obsolescence. There is increasing career specialization and dramatic rates of knowledge growth. It is important to track all of these trends and to assess what they might mean to our industry, our members and our association into the future.

In doing so, it is important that you don't let complacency set in among your membership base. That's why it

to his buddy a few years ago, when he was visiting, that he had "some of those things from the olden days," referring, of course, to CD's. A few months back, I showed them some of my old LP records. That really freaked them out.

**35mm Film.** The other day, I headed out to a photography store with a Compact Flash digital camera card in my hand to get some photos printed. "Where are you going with the film, daddy?" asked one. Which made me wonder, did they know what "real film" looked like? Not at all—since I've been doing digital photography since 1996, they've grown up in a world of pixels, not acetate. One day, I grabbed some negatives from an old set of photographs and showed it to them. They were fascinated, but won-

have digital cable—and all the boxes showed the description, "no data." I guess there must have been some type of hiccup in the system. I went to the front door, grabbed the newspaper, took out the TV listing section, and said, "Here, I'll show you how we did it in the olden days." They weren't impressed.

**Analog Clocks.** Call these kids digital or what! We were fortunate enough to be out of town when the Great Northeast Power Failure of 2003 occurred. But both boys were very curious as to what the power outage would mean and its effects. "How do people go to sleep?" one asked. That was a new one—we weren't quite sure what they meant. Until we realized that both of them have grown up with a digital clock beside their bed—if they wake up at night, they check the time and know it is time to go back to sleep. We've learned they can't even sleep without one.

**TV's With Knobs.** One day, I mentioned that we didn't have such devices in the "olden days." "How did people change the channel?" they innocently asked. I realized that they had no concept that back then—what, 20 years ago at most?—that most people actually had to get up off the couch to change the channel. The thought seemed completely foreign to them!

**Store Clerks Who Punch in Prices.** When my boys were 2 and 4, they played grocery store checkout. One would hand over the purchases, while the other would run the scanner and go "beep." They've grown up in a world of bar codes and it is a rarity when they see someone using an actual cash register where you type in the numbers.

**Portable Vacuum Cleaners.** "What's that?" the eldest asked the day we were moving into our ski cottage, pointing at our old portable vacuum cleaner. We've

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*It is important to track all of these trends and to assess what they might mean to our industry, our members and our association into the future.*

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can be useful to have a barometer that helps to measure the rate of change.

In my case, I track what my two boys—aged 8 and 10—happen to think about the world around them. Their world is a very different one, in that there are a number of things that we take for granted that already to them are, "things from the olden days."

**CD's.** In my home, there are 12,000 (legally acquired) songs on various servers in the basement. Music is pulled through the home network and played through a "digital audio receiver," a computer-like entertainment device that will be common in homes five years out. Since I converted all of my music back in 1997 to digital format, the CD's have sat in various boxes, packed away, simply as a form of backup. That's why my son commented

dered how you got that thing into a computer to see the picture.

**Airplane Tickets.** I'm serious! We travel a lot, we've been using e- tickets for as long as they can remember. I had a recent trip that involved an honest to goodness paper ticket and they thought the red and green carbon paper was really neat.

**TV Guides.** Saturday mornings in our home are "cartoon mornings." It's the only day of the week we'll let them veg-out for a few hours and watch their favorite shows. I came down one Saturday morning, only to find both sons with very sad expressions. "What's wrong?" I asked. "There's no data, daddy" said one. "No what?" I asked. He pressed the button for the "electronic program guide" on the TV—we

*Continued on page 13*

## Policy or Procedure?

by Bob Harris, CAE

You often hear the phrase “policies and procedures.” These similar terms may confuse volunteers and staff. Consider the source, purpose and retention of each will help you understand their differences.

### Formulating Policies

Policies are developed by the board and recorded in the minutes. Examples include policies on check signing, reserve funds, investments, diversity, document retention and endorsements.

Though board driven, sometimes a CEO sees a need for a policy and drafts it for review, adoption and inclusion in the minutes. For example, the CEO may suggest an investment policy based on careful research.

Policies are cataloged in a *Policy Manual*. For an effective manual, add a table of contents (i.e. finances, education, governance and meetings) and the date each policy was adopted or amended. Without a manual, one has to search years of minutes to find a policy somebody thinks was adopted. A policy manual should be used in board orientation.

### Differentiating Procedures

Procedures are administrative, a way to document staff responsibilities. They have minimal interest to the board. For example, the steps for processing a new member are managed by staff and should be documented to be consistent and effective.

Procedures may be a result of policies. A board policy on the chairman’s use of a corporate credit card will create procedures for submitting receipts on forms and reimbursement timeframes.

Use an *Operations Manual* to store procedures. All staff should document responsibilities. If no manual exists, have the staff create an outline or table of contents of the responsibilities needing documentation (and assign deadlines.) The manual will serve to train staff, reduce interruptions, minimize risks and promote consistent member service. An operations manual is the foundation of staff orientation.

Volunteers and staff will recognize the difference in policies and procedures applicable to governing and managing, when the terms are used separately. ♦

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*Bob Harris, CAE, is nationally known for association effectiveness, strategic planning and leadership development. Free management documents are at [www.nonprofitcenter.com](http://www.nonprofitcenter.com).*

## The ‘Olden Days’

Continued from page 12

had a built-in vacuum system for almost a decade, and so he was mystified as to the nature of the device in front of him. They watched in awe as we used it the first time, particularly as we pulled it around bumping into walls and doors. One observed that it was kind of a “dumb design,” in that it seemed to do more damage than good.

**Analog thermometers.** For years, as soon as we saw the bare hint of a fever, we’d quickly measure their temperature with a fancy digital thermometer. Which is why when they saw an old-fashioned, mercury glass thermometer at the doctor’s office they were fascinated. How was it used, they wondered. Better yet, did it go beep when it was finished?

**A sky without the Space Station.** Ever since they can remember, they’ve gone into our backyard at dusk on clear evenings, watching for the International Space Station and various satellites. They know that mommy and daddy will

tell them precisely where to look, at what time and in what direction the station or satellite will be traversing overhead. That’s because they’ve grown up with a web site called Heavens-Above, which will tell you the exact details, for any particular point on earth, where you can easily observe such orbiting wonders. To them, this is a normal and expected part of life—to me, it is fascinating that a system has evolved that lets me discover such magic.

The interesting thing is that each one of these examples, when examined in the larger sense, involves some type of sweeping industry, product or corporate change, which will mean dramatic change upon the change and careers of hundreds of thousands of people. That’s your role as association executives—preparing your members for dramatic change—and don’t ever think that the pace of change is going to slow down.

What’s the point of all this? In but a few years, the world has changed to a sufficient degree that my boys are growing up in a world that is dramatically

different, even from that which existed five years ago. I remain convinced that the rate of change is only going to increase and that preparing people to cope with change is one of the most important skills we need to provide.

Ogden Nash once observed that “progress is great, but it’s gone on far too long.” That might be a worthy sentiment for some, but those who think like that are ill-equipped to cope in a world of tomorrow that will continue to be unlike anything we know today. ♦

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*Jim Carroll, FCA, is a well known futurist, trends & innovation expert, who frequently advises organizations on a wide variety of issues. A frequent keynote speaker and seminar leader, he is also a popular columnist, having written through the years for the Globe & Mail, National Post, Marketing Magazine and many other publications. Additional information can be found at [www.jimcarroll.com](http://www.jimcarroll.com).*

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

One of the first actions that an association should take when it decides to lobby is to review the:

- A. Budget of the association
- B. Political affiliations of the association's leadership
- C. Existing grassroots contact network of members
- D. Registration requirements of the law-making body

### Answer at bottom.

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

Correct answer is D.

## Member Profile: Maureen "Mo" Goldman - ConferenceDirect

by Meryl Glickman, Meryl Glickman Marketing Communications

"Yo, Mo." That's what people say when they contact Maureen "Mo" Goldman for site selection, contract negotiations and other meeting planning services. For the past two years, Mo has been a national account manager for ConferenceDirect—a full-service meetings management company.

In sales since 1988, Mo started her hospitality career as a ski tour wholesaler for a Colorado company, where she booked and escorted corporate and recreational ski groups all over the United States, even leading a FAM trip to Chile in 1990. While the majority of her bookings at that time were in Steamboat, she has also represented Copper Mountain, the Vail Valley and the historic Hotel Colorado, Glenwood Springs during a ten-year period, operating from her Denver-based office. Mo knows all the Colorado resorts for both summer and winter bookings and has handled all market segments for local and national groups. Prior to her ski and meeting planning career, she spent 11 years working in recreation as camp director and aquatics director for nonprofits and municipalities in the Denver area.

A member of CSAE for the past 10 years, she's a regular at the monthly meetings and annual conferences. For the past three years, she has been a member of the CSAE Communications Committee and a regular contributor of articles to the *Executive Memo*. With the exception of this month, Mo regularly writes this member profile column. Mo's industry credits include DIA Ambassador and guest lecturer at Metropolitan State College.

Mo grew up in east Tennessee, attended high school in Chicago and subsequently moved to Tucson, graduating from the University of Arizona with a degree in education. A resident of Denver for the past 25 years, she's done almost everything there is to do in Colorado, including skiing all but two mountains in the state. She was a recreational racer for eight years, spending two of those years

as ski team captain. A passionate traveler and tourist, she has visited most of the United States, Canada, Mexico, Europe, Israel and, most recently, Hong Kong and China.

Mo is married to Dennis, who sells health insurance to individuals and small businesses. As high school and then college sweethearts, they reconnected 10 years ago and fell in love all over again. She became an instant mom to his two children—Ari, a newlywed, and Noah—both students at Metro State and accomplished martial artists.

What would Mo like to be doing in the next 10 years? "Just what I'm doing now, but enjoying room service more often." If you want some help with your next meeting or event, contact Mo at 720-334-1905 or [mo\\_goldman@conferencedirect.com](mailto:mo_goldman@conferencedirect.com). ♦

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*Meryl Glickman is a marketing consultant with broad cross-industry experience. Healthcare, association, education, , technology and transportation markets are just a sample of the profit and non-profit industries she's worked within. Twice a winner of CSAE marketing awards, Meryl is able to position organizations to achieve their image, growth and financial objectives.*

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