

A person wearing a grey suit jacket and a blue shirt, with their hands clasped together in front of them. The background is a vibrant red with a crumpled paper texture.

\$29.00

TIPS TO EXCEL IN ASSOCIATION, CHAMBER AND NONPROFIT MANAGEMENT

- **Organizational Effectiveness**
- **Travel and Meetings**
- **Serving Members**
- **Personal Image**
- **Office Administration**

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INTRODUCTION

Bob Harris began his career in association management in the same way many professionals entered, “association by accident.” He started working at a nonprofit organization founded through the White House, called A Presidential Classroom for Young Americans. Like many executives in association, chamber and charitable organizations management, he had neither studied nor planned to work in a nonprofit¹ organization.

From Washington he moved to Tallahassee, Florida to lobby and eventually establish an association management company. Over 20 years he grew the company and chronicled its operations in “Building an Association Management Company²” He transitioned out of the firm to become a community college instructor, national speaker, trainer and strategic planner.

Today he shares tips, templates and best-practices with thousands of association boards and staff. He authored the Association Self-Audit Program® to improve performance and reduce risks in associations, chambers

and charitable organizations. Across the United States, he is well known for being practical and realistic in working with volunteer leaders and staff.

His style has been called the Feng Shui of association management, and audiences across the country appreciate his realistic approach. His aim is to see every nonprofit organization, board of directors and staff reach their optimal potential.

Free association management templates, tips and tools are available at www.nonprofitcenter.com. He conducts operational audits, leadership development, strategic planning and seminars on efficiency, risk management and “board roles and goals.”



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¹ Nonprofit is used synonymously with the legal phrase “not-for-profit.”

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FOREWORD

First things first: I am a proponent of efficiency. Members expect the organization to be a model of efficiency. My efficiency relies on systems, manuals, performance measurements and quality controls.

I have worked with many of the association profession's finest staff members. We were employed at an association management company headquartered in Florida, founded in 1979. Our niche was statewide trade associations. Over 20 years we developed best-practices, standards and templates applicable to nearly every association, chamber and nonprofit organization in the U.S.

I am a proponent of efficiency. Members expect the organization to be a model of efficiency. My efficiency relies on systems, manuals, performance measurements and quality controls.

I encourage colleagues to read Michael Gerber's best selling, *E-Myth Revisited*. The book promotes the concept that if you build systems, they will run the organization with consistency so that the staff can focus their time and efforts on the mission, members and board of directors. Without systems, time is wasted, training is inconsistent and risks exist.

Tips to Excel in Association, Chamber and Non-Profit Management is a digest of light-hearted and proven practices for working in an environment influenced by volunteers, limited resources, contributors, committees, sponsors and the everchanging board of directors.

Not every practice applies to every nonprofit organization. You are encouraged to consider how to adapt the tips to your situation, and share them with a supervisor or at a staff meeting. The tips include anecdotes, the rationale and postscripts. The intent is to help employees of nonprofit organizations.

Topics include:

- Personal Image
- Travel Tips
- Organization Effectiveness
- Serving Members
- Meetings
- Office Administration



Bob Harris, CAE

AVOID FULL HANDS AND A FULL MOUTH

I've watched staff members attend receptions and fall into the trap of believing they were there to eat, drink and party. The purpose of most receptions is to represent the interests of the organization or community to which you are associated. It is a pleasant environment for making acquaintances, exchanging business cards and sharing information.

While the food and drink is inviting, the purpose of the event is to network and exchange information. One cannot be an effective networker trying to do three things at once: eating, drinking and talking. It is nearly impossible to balance a plate of food, keep your hands clean, hold a drink and exchange business cards.

When you are holding a plate, fork, napkin and drink glass, you give off the message that you are busy. You can eat and talk, you can drink and talk and you can eat and drink – but you can't do all three and project a professional image.

Enjoy the reception and achieve its intended purpose by focusing primarily on networking. Eat before or after,

and limit your consumption of alcohol. Your aim is to represent your organization while making a favorable impression.

P.S. Always have a supply of business cards and keep them accessible in a convenient outer pocket. When you meet people, utilize the back of the business card to write a note about the person or a suggested follow-up.



PLEASE DON'T SIT TOGETHER

We attended a luncheon of more than 200 persons with a new staff member. We asked her to sit with anyone she didn't know and not to sit with us. She was uncomfortable and said it took months to understand why we deserted her.

Meal functions are more casual environments where you can meet new people or target a person you need to me.

If staff members sit together they appear cliquish. It makes a bad impression and deters others from joining you. If friends and staff must sit together, leave alternate chairs so that others can sit between you and join in the conversation.

Purposely sit with someone who will have benefit to you in new ways. Set a goal of meeting a certain number of new people --- exchange business cards and review them when you return to the office.

Tips for networking at meals:

- Be adept at table etiquette. For example, don't eat until everyone is served.
- Everyone at the table may be a little uncomfortable, so take the opportunity to act as if you are the host. Start

out by introducing yourself and suggest that everyone do similarly.

- Start the conversation by asking questions of others: why people are there, what they hope to gain, how they found out about the event. Avoid monopolizing the conversation or making statements about yourself. Include everyone at the table.
- Keep your business cards handy. Be ready to receive busy cards and make notes on them as to what you learned about the person or have committed to send them.

P.S. Here's an easy way to remember which utensils are yours. The words fork and left have four letters. The word knife, spoon and right have five letters. Easy ways to remember that the fork is on your left and the knife and spoon are set to your right.

REMEMBER NAMES

A person's name is a powerful reinforcement. A staff member who confidently approaches a volunteer with, "Hi John, we are so glad you can be at this committee meeting," makes a lasting favorable impression. The worker who does not use or remember names misses a golden opportunity to make favorable impressions.

Hardly any word sounds sweeter to a person than his or her name. If you use their name, they know you care and you have taken the time to remember them.

If you often say, "I'm sorry I've forgotten your name," or you cop out with, "I never was good with names," then you should use techniques to remember names.

When someone introduces him or herself, repeat the name twice: first silently to yourself and then out loud to them. For example, I might say, "I'm Bob from Tallahassee." To yourself you may think of another Bob who worked in politics. You say, "Bob, were you in Tallahassee during the presidential election of 2000?" By repeating the person's name to yourself and then aloud, you are likely to remember their name and they will be impressed that you used it within minutes of the introduction.

Also review attendee rosters before meetings start.

It will help you prepare for and recall names. Pay special attention to the board of directors' names; they deserve and expect your respect.

If a meeting starts with introductions, use that opportunity to focus on names. Try this: diagram the table seating and write down each person's name. The seating chart will help you recall names throughout the meeting.

Use or suggest name tent cards. If tent cards cannot be preprinted, simply give everyone a marker and a sheet of 8 1/2 by 11 paper they can fold in half and place in front of them.



P.S. When making name badges, print the person's first name in the largest font. Don't let your organization's logo, convention theme or paper color interfere with readability.

HANDSHAKE AND EYE CONTACT

I have a good friend who offers a firm handshake and does not let loose until you make eye contact with him. He says eye contact is as important as the handshake. I've heard him say to a young person, "Look me in the eye when you shake my hand."

Association and chamber executives throughout the world are generally hospitable. I realized it as I visited associations in various countries. In each country, staff members welcomed me, made sure my hotel was satisfactory, and helped me prepare for a speech. It could be the example of the hospitality industry; or maybe it just comes natural as a result of helping members.

The initial signs of a relationship are an extended firm handshake, a friendly greeting with a smile and good eye contact.

Ironically, I have worked with association members who I would characterize as the opposite of confident and courteous. When I extended my hand, greeted him or her and introduced myself they simply nodded or offered a lukewarm handshake with no smile or greeting.

Make favorable impressions with members by extending a firm handshake, offering a kind remark ("it is nice to see you" or "welcome to the meeting") while looking them directly in their eyes. These simple actions are cues as to your interest in the person, your social skills and your authenticity.

P.S. Don't be distracted when you are speaking with colleagues at a reception or meal. Focus attention on their conversation and face, not looking over their shoulders or trying to find other friends while halfheartedly listening to them.



ARRIVE ONE HOUR BEFORE MEETINGS

I've seen staff arrive 10 minutes before a scheduled meeting only to be surprised the room is set-up incorrectly, missing audio-visual equipment, or lacking the required number of chairs. By the time hotel help arrived the staff was sweating bullets and moving the tables and chairs on their own

No matter how detailed the instructions are for setting tables, chairs, registration desks, signs, easels, audio-visual and flip charts, you can plan that part of it may be lost in the communications.

I call it Murphy's Law and it goes something like this:

- Anything that can go wrong – will go wrong.
- Left to themselves, things tend to go from bad to worse.
- You will always find something in the last place you look.
- If everything seems to be going well, you have obviously overlooked something.
- The planner should be able to both heat and cool the room at the same time to satisfy attendees.

If you find things awry and in need of change,

it will take time to find help. By being there early you can communicate the needed changes to the facility so that adjustments can be made.

Adopt a standard of arriving 60 minutes prior to the scheduled starting time to check that everything is perfect. By doing this, you will avoid having to ask the entire facility staff to perform miracles to transform a room from herringbone theatre seating to center-aisle classroom set-up.

If you do arrive early and the room is correctly set, then spend the extra time checking the signage, setting up a registration desk or distributing handouts. Consider the advance hour your personal time to prepare the final details of the meeting.

P.S. One of the best ways to insure a room is set up correctly is to take the time to graphically diagram the preferred set up and specific locations of signs, podium, tables and chairs.



THE MILK TRUCK THEORY

If you went to lunch and were inopportunately run down by a bus or truck, would the person stepping into your position find everything in good order? I call it the “milk-truck-theory.” Keep all records, files and systems current and well documented in case you depart the organization unexpectedly.

Staff has a responsibility to ensure that an absence for any reason or length will not cause an interruption or chaos in the organization. Create systems so that someone can take over your responsibilities without the interruptions associated with having to find files and pick up where you left off.

You can be prepared by visualizing that someone was coming into your office tomorrow to take over your responsibilities; is everything documented, current and easy to understand?

The best way to stay organized is by creating a procedures manual for your job position. Challenge yourself to keep it up to date and bring it to your annual performance review to show how organized you are.

For example, if you publish the newsletter, create a bulleted or enumerated list to explain gathering articles, typesetting, proofing, printing, mailing, selling advertisements, billing advertisers, deadlines, etc. Or, if you are responsible for

billing membership dues, explain in detail how and when each step occurs.

A procedures manual insures consistent operations, easy training and smooth knowledge transfer. Thus, if you receive a promotion tomorrow, the procedures manual will be sitting on your desk for your replacement to get a good start.

P.S. The legacy of a staff member is often judged on how well organized, systemized and documented operations are for successors to administer. What will your legacy be?



HOLD A PASSPORT

Imagine the organization CEO calling you into the office with this news, “There is a meeting of our sister organization in London next week and we need to have a representative attend. Can you go for us?”

Passports take several weeks or months to acquire. Whether or not you have ever been out of the country or want to be, make sure you have a valid passport. It’s all about being ready for opportunities that arise at a moment’s notice.

P.S. Carry a second government identification in your briefcase or backpack just in case you lose your wallet or passport. Most state offer an official ID card for a small fee.



PACK STRATEGICALLY

At an out-of-town board meeting I noticed the organization's business affairs manager wearing a really nice suit and tie... without socks. Afterwards he explained he had forgotten to pack socks and the meeting started too early to solve the problem. He said he felt as silly as he thought he looked.

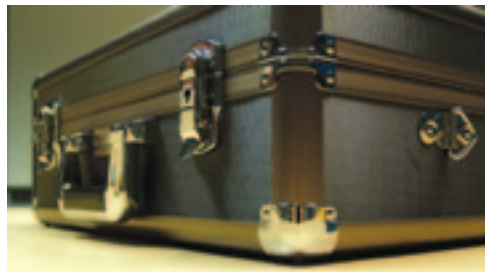
When packing for a trip, envision everything needed for the scheduled activities. Then consider what you might need if something unexpected arises. If the chairman of the board surprisingly proclaims, "I'd like to take the staff out to a nice restaurant...let's meet in the lobby in an hour," will you be ready and appropriately dressed?

Pack enough clothes to be prepared for spontaneous opportunities – from a fun night at an attraction to a formal dinner. Mix and match suits so you don't have to carry a wardrobe, but have flexibility in your attire.

Learn to pack so you don't have too many bags, especially when security is high at airport screening

and airlines limit the weight and number of carryon items.

P.S. Count your bags and arrive at the airport with ample time. I recall a staff member who consistently got to the airport at the last minute. One time he got himself and his bags on the plane, but forgot four critically important boxes of convention nametags in the trunk of his car!



RELY ON RECEIPTS

I took a trip across the state with a staff member who did the driving. As we passed through highway tollbooths I was surprised he did not request receipts. When I asked about it, he said he didn't think it was worth keeping receipts for items less than \$5. Within a year, he could have lost \$200 to \$500 that the organization had budgeted for travel if he had submitted the receipts.

In membership organizations, the resources (i.e. money) belong to the members. As a staff member you are expected to account for every penny.

When traveling or purchasing supplies, ask for a receipt, no matter how minor the expense. If you go through a toll plaza you deserve to be reimbursed and the organization deserves to know where its money was spent.

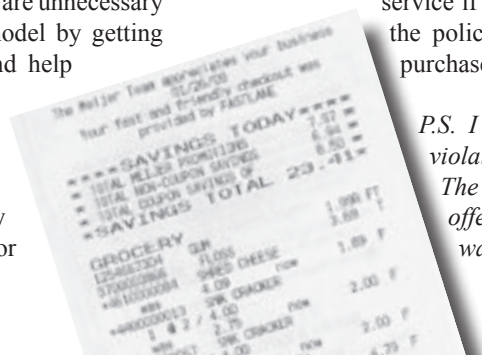
If your bookkeeping office indicates that receipts are unnecessary for costs under \$20, for example, be a role model by getting receipts for everything. It will protect you and help answer the question, "Where do our dues dollars go?"

Gratuities are expenses that do not generate a receipt. Ask if your organization has a policy about how much or what percentage to tip for meals, valets and luggage handling.

Use an envelope to keep receipts apart from your wallet, purse or pockets. When I enter a hotel room, the first thing I do is remove the receipts from my pocket and put them in a hotel envelope. Upon return to the office they are organized by trip and ready for accounting.

Another note about the members' money: You may enjoy valet parking, in-room movies and mini-bars, but members may disagree. Consider this standard: Would you buy the items or service if you were spending your own money? Verify the policy on questionable costs before making the purchases.

P.S. I once knew a man accused of an antitrust violation who could have faced a \$10 million fine. The fact that he had a 50-cent toll road receipt offered proof that he left the meeting, and that he was not a part of the price fixing scheme.



NEVER PARK AT THE FRONT DOOR

I've watched individuals with appointments drive up to the front of my building, park in the space marked "Visitors" and apply their make up, finish an Egg McMuffin, make phone calls or ruffle papers looking for sales kits. It's a revealing first impression.

If you are visiting members or prospects, avoid the urge to park in the space closest to the door. Those premium parking spaces are intended for customers. If you park at the front door, you've made the statement that you are the most important person to the business.

Best advice is to park at the side or back of the building. If parking is limited, find a space on the street. There you can get yourself situated and then enter without having been watched from inside. The extra 20-yard walk can't hurt and might gain some respect of the person you are visiting.

The practice also applies at your own office building, save the best spaces for VIP members and deliveries.

P.S. I received a ticket for parking on the street in a snow emergency zone during my first week of employment at Presidential Classroom. It was my fault and since then I've learned two things: 1) read the parking restriction signs carefully, and 2) any tickets for violations are to be paid by me, not the organization.



SIMPLE COURTESIES

I was invited to a White House briefing. As I entered the Executive Office Building, the man in front of me held open the door – he was a U.S. Senator. I said thank you and he replied, “If I can’t do something as simple as opening doors, I would not be where I am today.” His simple action made a lasting impression about courtesy.

You are in the position of being able to make members comfortable and feel special. As civility wanes, staff courtesies are more readily noticed and remembered.

The action of holding a car or elevator door makes a favorable impression. Here are some simple courtesies to practice:

- Hold the door for others.
- Enter last as you hold the door.
- Drop the slang and cursing.
- Include everyone in conversations.
- Don’t have intense, private conversations in a meeting.
- At meetings, sidebar chats with table neighbors are distracting.
- Turn off digital distractions.

- Whether or not you’re interested, look at the speaker.
- Be prepared by carrying a notepad and pen to every meeting.

At meetings, ask if anybody needs a writing utensil or if the temperature is comfortable. Take a minute to point out the restrooms, phones and emergency exit. Be alert to the needs of persons with disabilities (who may not speak up) but can use assistance in a buffet line or with a seating location.

P.S. Studies show that people who smile on the phone sound more pleasant and helpful. Try keeping a small mirror on your desk to ensure you are smiling when you are on the phone.



MENTORING AND PROTÉGÉS

I was urged to study for the Certified Association Executive exam by a colleague who offered to be my mentor. He guided me through the textbooks, study courses and encouraged me to diligently prepare for the test. Without his mentoring, I may not have broadened my knowledge and received the important CAE designation.

Consider mentoring from two perspectives. Either you desire to have a mentor – someone willing to be there for you when you have questions or to accelerate your success. Or, you are in a position to be a mentor.

I've been involved in a study of mentoring where the protégé reported at the end of a year that the rewards were great. It helped her think outside the box, to see herself in a different light. She tried new things and her advances were significant during that year – including a raise!

If you're in a position to be a mentor, then step forward and offer. There are many inexperienced association and chamber professionals who would benefit, but they don't know who to ask or what information they are lacking. One of the greatest career rewards is

helping a colleague advance their career.

Mentoring is relatively easy. Be ready to ask questions of the protégé or to offer information and guidance as a mentor. Set aside an hour or two a month to discuss challenges, advances and resources. Both sides have to be good listeners and willing to teach and learn. At the end of the year both mentor and protégé will be equally rewarded in the relationship.

P.S. Successful executives should consider teaching and mentoring as a repayment of a debt for great success. Seasoned executives should write articles, speak, mentor and even teach at a college to share their experience with eager young professionals.

DON'T BE A HYPOCRITE - VOLUNTEER

I've encouraged staff members to join an organization, offering to pay a portion of the dues. Several times I've received the reply, "Why join an organization, I'm busy with work and family? I don't have time to serve on committees or volunteer."

To appreciate what it's like to serve as a volunteer or board member, you should invest time and money in your own community, chamber, association or civic organization.

It supports the adage, "walk a mile in another man's shoes." A staff member who has not served on a committee may have difficulty relating to the work of committee members.

When you decide to join an organization, carefully consider which one will be best for you. One protégé' thought her position required her to join a technology society. I encouraged her to join a more general organization in which she eventually became a high level leader. The narrow focused organization would not have been nearly as beneficial to her.

In my career, I decided early that I would be active in my professional society and avoided joining a civic club. I felt the

professional society would offer greater benefit in the long-term.

To avoid being a hypocrite before your own members, be sure you have your own causes, join organizations, participate on committees, consider professional certification, support ethics and test the programs promoted to your organization's members.

P.S. Not sure what organization to join? Consider where you want to take your career and how the organization can be of help. Just as many of your members judge the "return on investment" against the dues paid, you too should consider what you will get out of joining a professional organization, civic club or volunteering your services.



PROFESSIONAL DEVELOPMENT

I worked in a nonprofit organization for six months before I realized it was different from commercial businesses. Similar to nearly 90 percent of nonprofit professionals, I characterize my entry as “association by accident.” Thus, seeking knowledge in the nonprofit community is essential for doing a great job.

No matter how you entered the profession, you need to keep up with management trends and the best business practices. Only a few colleges offer curriculum focusing on non-profits.

You will have to look around to find appropriate continuing education. Start by determining that you want to be the best possible in the profession; realizing that requires education.

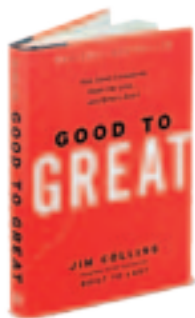
You'll find excellent curriculum from the American Society of Association Executives, the U.S. Chamber of Commerce, the Association of Chamber of Commerce Executives and the National Council of Nonprofit Organizations, among others. Check their websites for seminar

and conference offerings and look to their local affiliates for additional courses.

Also consider gathering the knowledge and experience required to become certified as a meeting professional (CMP), chamber (CCE) or association executive (CAE).

Certification ensures you have a broad knowledge base and is recognized internationally.

P.S. Because most certifications require a minimum number of years of experience, including proof of seminar attendance, memberships, public speaking, authored articles, etc., start a file folder to maintain records of courses, articles and anything that supports your qualification for certification.



SIGNATURE-QUALITY WORK

To prepare for camp, mom sewed my name in my shorts and wrote it on belongings so they would come home with me. Putting your name or initials on every memo, project and file you touch, associates it with your image and standard of quality

Staff members should take pride in their contributions to projects and their work. Make excellence your standard.

Don't let a sloppy document, message or article distract or discourage members. There are many organizations vying for your members' time and money.

To indicate that you have set a standard of excellence, add your initials, name or signature on every finished item. It attests that your work is worthy of your name, indicating it is signature quality.

Thus, no project is complete until the individual or

team adds their names. Add a bit more information to a document to save time. In addition to the author's initials at the bottom left of a document, add the file name and its location. The practice ensures that if you are away, colleagues can find files. For example:

RCH/acer
F:/users/bob/tips
Q-1,000: 6/09

P.S. On printed projects, add the quantity and printing date on documents for efficient reordering. Use a small typeface (8-point) so not to distract from the message, but for quick reference when it is time to reprint.

PROMOTE THE TEAM

*I read this advice in the training manual of a performance enhancement company:
“As much as possible, promote other staff members – not yourself.”*

When a member asks, “How you are,” don’t jump into a conversation about yourself. If you do, you have missed a great opportunity. Though the question was about you, the member really wants to know as much as possible about the organization to which they belong.

By focusing the conversation on others in the organization rather than “all about me,” you can answer the question quickly and then gain respect by talking about the achievements of others.

Further, there is greater credibility when others say positive things about you, than when you promote yourself. If everyone on staff promotes the team, soon the leadership and membership recognize the importance of the staff and the entire workforce, not the contributions of just one person.

Next time someone says, “How’s it going at the office?”

reply with a positive statement about your own position and then mention the achievements of your colleagues and the organization in general.

P.S. Apply this locker room adage inside your office: “A player who helps make a great team is better than a great player.”



SET HIGH STANDARDS

When I worked in Washington, D.C., I recall private offices using pens inscribed with “Property of the U.S. Gov’t.” I wondered how so many government pens made their way into private desks. Though pens may have nominal value, they didn’t belong to me. That was when I determined my ethics would not be based on “value” but rather a standard that if I didn’t pay for it (pens, hotel towels, office supplies) then it wasn’t mine.

There will be times when ethical concerns or conflicts of interest arise. They can range from a board member wrongly asking for free services from staff – to accepting a complimentary stay at a hotel you know you will never use. YOU alone must decide what your ethics will be.

The professional society to which you belong may have a code of ethics, conduct or standards. Consider how it applies to you and determine to be your own role model of high standards.

If your organization provides a code of standards to the members, read, understand, promote and encourage compliance. If the board of directors has a code of conduct or values statement, acquaint yourself with that, too.

For illustrative purposes, here is the Code of Standards from the ASAE and the Center for Association Leadership.

As a CAE and/or Association Chief Executive Member or Association Professional Staff Member of ASAE & The Center, I pledge to:

1. Maintain exemplary standards of professional conduct.
2. Actively model and encourage the integration of ethics into all aspects of management of the association(s) which employ(s) me.

continued on next page

SET HIGH STANDARDS

3. Pursue the objectives of the association(s) that employ(s) me in ways that are ethical.
4. Recognize and discharge my responsibility and that of the association(s) that employ(s) me to uphold all laws and regulations in implementing the policies and conducting the activities of the association(s).
5. Strive to continually advance my knowledge and achieve higher levels of excellence in association management.
6. Maintain the confidentiality of all privileged information, except when so doing becomes an ethical or legal breach of conduct.
7. Serve all members fairly, holding foremost the interests of the association that employs me and its industry or profession; faithfully executing my duties and never using my position for undue personal gain; and promptly and completely disclosing to appropriate parties all potential and actual conflicts of interest.
8. Actively encourage all people qualified or eligible to be a part of the association(s) which employ(s) me to participate in the activities and leadership of the association as appropriate.
9. Communicate all association internal and external information to the elected leadership(s) and membership of the association(s), which employ(s) me in a truthful and accurate manner to facilitate timely execution of their fiduciary responsibilities.

Source: www.asaecenter.org



P.S. Nonprofit organizations and their employees are not immune from public scrutiny. Promoting a code of conduct is good for public understanding and positioning the organization as distinct from other entities.

BE PRESENT

The guys at Pike Place Fish Market in Seattle describe their jobs as messy, smelly, repetitive and often inclement, as they work every day of the year, starting before dawn. The conditions for selling fish in an open-air market just aren't the best. Yet they are world-famous for making their jobs fun while producing a significant profit for the business. Because they are the epitome of job satisfaction and fun, the FISH video about their company is used for employee training around the world.



On the way to work we choose our attitudes. We can be bothered by the problems at home and distracted by personal issues. That attitude reveals itself in being short with members and rude with colleagues.

Or, we can decide to “be present” --- to make the workday pleasant and to promote a friendly, eager attitude. Similar to “cast members” working for Walt Disney World, when you walk through the door of the association, chamber or nonprofit organization, you are on a stage and should be enthusiastically

focused on the members, constituents, contributors, customers and the job that day.

P.S. Find an opportunity to view and share the FISH video with staff. It portrays how the small staff at Pikes Place Fish Market became world famous by providing enthusiastic, memorable service.

STEWARDSHIP

While your job may span several years, in most organizations we are but a blip on the screen. Some associations and chambers were founded as early as the 1700s; others have many decades or a century of history.

Every organization has a past, present and future. While your responsibilities may focus attention on today, you are part of a continuum for advancing the interests of a trade, profession or community.

No one person “owns” a nonprofit organization; it belongs to the members.

Employees simply are stewards in its perpetual existence. Not only should staff focus on today’s responsibilities, but also understand the past, celebrate achievements and work towards the goals of the future.

Be sure you know when your organization was

founded and a bit about its history. Ask where you can find out more about the historical highlights and achievements, as well as the strategic plan. Have a short “elevator speech” memorized that succinctly describes the organization.

P.S. Nonprofit organizations were making an impact in North America before the U.S.A. declared independence from Britain. For instance, the Carpenters Company, made up of architects, carpenters and engineers was founded in 1724. Benjamin Franklin founded the American Philosophical Society in 1743.

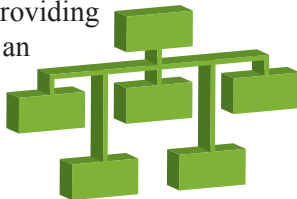
ORGANIZATIONAL CHARTS

How do I get elected to the board? Where do the committees fit in the organization? Do we have a foundation? How does information flow between staff, board and committees? How many committees are there? These are all questions that can be answered with an organizational chart.

Members can be more engaged if they understand the hierarchy, structure and information flow of the organization. Many organizations utilize rosters of committees, chapters or board to inform members. There are other ways to communicate or supplement the information and make it more transparent.

A graph or chart depicts how members can volunteer and use the organization to their benefit. An organization chart is a schematic of hierarchy, organization and information flow depicted on one page. A roster usually only provides names and positions. Providing a list or roster is less illustrative than an organizational chart.

Each person has a preference as to how



they receive and absorb information. Some people learn by *listening*, others prefer to *read*, and still others prefer to *see* images and charts.

There are clues that indicate a person's preferred style of communication, for example:

- "I hear what you're saying," is an auditory person.
- "Let me read the document first," is a person who prefers to read.
- "I can picture it now," would indicate a person who likes charts and graphs.

P.S. The right software makes creating and updating organizational charts easy.

WRITE OFTEN

A staff member working at a very small chamber of commerce made a national reputation for herself by writing articles. She used her writing skills to expand her circle of influence by sending guest columns to newsletters and magazines.

Association staff members develop good communications skills as a result of their responsibilities for writing reports, taking minutes, updating Websites and editing newsletters, for instance. The same skills can be used to enhance your credibility and reputation.

Grow beyond the community in which you work by preparing guest columns on subjects of interest to colleagues in nonprofit management or for the members of your organization. Mail or fax articles to publications that you identify across the country that may be interested in an article when space is available.

Because many editors are too busy to research and write stories, they rely in part on receiving unsolicited contributions. To be considered by editors, adopt a format that uses double spaced lines and identifies the author, title and distribution date at the top.

Remember that readers prefer short articles with a good introduction, several bulleted points, and a summary closing paragraph. Review *USA Today* for a writing style you might adopt.

Save copies of published articles for your personal portfolio. You will be surprised how much respect and credibility you earn because others see your byline in their reading materials.

P.S. Don't call editors asking if they received your article and when it will be published. Your contribution is often considered "filler" --- they might use it when they fall short of text. Don't expect editors to send you complimentary copies or thank you notes.



INFORMATION MANAGEMENT

Members expect to have nearly instant access to information. The majority of members care less about governing documents and far more about “answers for today and solutions for tomorrow.”

A reply of, “I don’t know” or “it’s not my job” is clearly unacceptable to a member. Consider that some members may call only one time a year; the wrong answer may discourage them from renewing their membership. There are many competitive organizations, and the Internet, vying for members’ attention, time and dues dollars.

Staff members are information managers. Learn to scan the abundance of information relevant to your members. The process is scanning, analyzing, storing, summarizing, packaging, delivering (articles, manuals, seminars, Website, etc.) and archiving. Each step adds value to the information for members.

Few nonprofit organizations produce a product or inventory; thus information is the primary asset. It is the organization’s intellectual property (member lists, reports, plans, articles and manuals) and should be protected by staff.

Make it a practice to add the organization’s name in a header¹ or footer and/or watermark to all documents. Members and prospects should recognize your organization as the source of valued information.

If information is deemed confidential, protect items such as minutes, budgets and member lists with the word “CONFIDENTIAL” in the footer or watermark.

P.S. Add the copyright symbol (©) to documents, including the year and organization’s name, to further protect original information. The notice of copyright is powerful in preventing illegitimate distribution, as well as adding perceived value.

¹ Header is a phrase, identifier or logo printed at the top of each page, the footer is printed at the bottom; a watermark is a logo or word printed lightly behind the text on a page.

ACCEPT AWARDS WITH POISE

I was sitting in the back of the room when I heard my name called. I wondered why. Then someone asked me to approach the podium to receive the Executive of the Year award. I'm not sure how well I accepted the award - I don't even know what I said. It was that day I decided to be prepared when an audience wants to surprise me with a recognition at the podium.

Here are three tips if you're called to the podium:

- First, stand up and take a deep breath as you walk to the front of the room. You have about 20 seconds to compose yourself and prepare any remarks.
- Second, approach the podium, take another breath and look into the audience. The pause gives you a few extra seconds and allows the photographer to take photos.
- Third, accept the award and say "Thank



you.” Read the text of the award because the audience is eager to know what you have received and what it says about you. Then take a minute to tell them how nice the gift, plaque or certificate will look in your office – they want to know you will use and value it.

These three steps will prepare you to receive awards and recognitions with poise in front of any size audience.

ALWAYS SAY THANK YOU

Although I always say “thank you” after someone pays for a meal or favor, to emphasize my appreciation, about 20 minutes later I ask, “Did I remember to say thank you?” It is a simple way to reinforce appreciation to volunteers.

You can never say “thank you” too often. In a chamber, association or charity, busy volunteers deserve unending gratitude for volunteering, joining or renewing.

The custom of sending thank you notes is diminishing. Thus, the staff member who mails a note to a volunteer or a successful chapter makes a lasting impression. It pleases the recipient and encourages them to do more, while emphasizing that their contributions are noticed.

Keep a supply of thank you cards or postcards at your desk to jot quick notes soon after the action. I use postcards of the state capitol which are often

appreciated by members interested in advocacy. Other signs of gratitude include gifts, a newsletter article about the volunteer, a phone call or a well-crafted e-mail message.

Don’t take anything for granted – always say thank you. And don’t overdo electronic greeting cards, if you use them at all. Many people don’t have the time to open them or fear opening unknown files.

P.S. Don’t miss the opportunity to show your gratitude to the board of directors with a simple gesture. After a breakfast or lunch provided at a board meeting, simply say, “Mr. Chairman, before we get started I want to thank you for the meal and the break, it is really appreciated.”

A GIFT TO REPRESENT YOU

When I worked on Capitol Hill in Washington, D.C., my boss would make me deliver bags of Vidalia onions and recipes. I didn't enjoy it, but I realized the Members of Congress anticipated the delivery and remembered him for the unique gift. (My boss was from Vidalia, Georgia.)

If you want to make an impression or give a gift, find an item that genuinely represents you or your interests.

Early in my career, I picked a gift that I knew everybody liked, was affordable, and could be easily packaged and delivered – *homemade chocolate chip cookies!*

Later on, I found another gift that opened doors and represented my taste for coffee – espresso makers. Every office drinks coffee, but few have the ability to brew a cappuccino. I delivered the machine with espresso beans, milk and flavorings. It gave me time with the staff to demonstrate how to use the machine.

In subsequent months, I delivered or sent a new blend of espresso, further reinforcing the relationship.

Select a gift that works for you. Your reputation will spread as you become known as the cookie baker, espresso-man, or local wine-deliverer. It is far more memorable than dropping off a dozen donuts.

P.S. My dad owns a precious gem and rock shop in Sarasota, Florida. He always carries a pocket full of polished rocks. Everywhere he goes he hands out "love stones" to encourage people. His stones and inspiration are remembered far more than his business card.

GIVE CREDIT FREELY

I had diligently assisted the trade show committee. After months of efforts I heard the committee chair being praised for a job well done. I knew that staff carried most of the workload, but staff recognition was non-existent. That's when I realized that my job was not to be praised, but to direct praise to volunteers.

In Jim Collin's book, *Good to Great*, he suggests the finest leaders are those who "channel their ego needs away from themselves into the larger goals of building a great company." They don't expect or need to receive praise.

Many organizations struggle to find and retain quality volunteers. When you rely on volunteers, be positioned to extend plenty of gratitude.

Appreciation encourages volunteers to be an integral part of the organization, while also lightening staff's jobs. Though the concept of redirecting the credit may feel uncomfortable

initially, in the long run you'll get the due credit and added respect from the leadership team.

As a staff member, set aside ego and give credit to the volunteers. Volunteers receive no financial compensation thus gratitude is music to their ears...whether or not they carried the bulk of the heavy load.



P.S. Be cautious of how many bylines and photos mention your name or show your photo in the organization's newsletter. The publication isn't about you; it's about the members. Encourage them to contribute articles and photos and leave yourself out of the limelight.

SPELL CHECK AND PROOF READ

I have read job resumes' fraught with typos, errors and poorly organized. My first thought is, "this person would treat our association's documents and communications with the same disregard as their own resume."

In most organizations the members seldom visit the office. A relatively small percentage attends meetings. The non-participants are known as "mailboxers;¹" just satisfied to receive and read newsletters. Therefore, it is your newsletters, e-mails, correspondence and the website that form their primary impression of the organization.

You want to promote excellence in every type of communication.

Every error distracts from the message and reflects badly on the organization. It does not matter if it's an informal document (including e-mails), every

communiqué must be carefully proofed for typos and grammar. Consider these proofing tips:

First – Carefully read your work. No matter how busy you are, leave enough time to review and proof everything you write.

Second – Set a standard of 100% accuracy. There should be no mistakes. If you think 95% accuracy is high enough, then you accept the premise that five out of every 100 words may be misspelled.

Third – Use your word processor's spell check feature. It will not catch all the errors because it may

¹ Mailboxer – see Allegiance.com for a description of various member characteristics.

SPELL CHECK AND PROOF READ

not recognize your word usage, intent and proper nouns – but it can be of great help. Here are some common mistakes a spell check may not catch:

you're – your
they're – their – there
its – it's
except – accept
alot – a lot
no – know
weak – week
to – too – two
who's – whose
lessen – lesson
hear – here
forth – fourth
seam – seem
buy – by
board – bored
affect – effect

Fourth - Ask someone else to proofread your work. After you have worked on an article or letter, you become blind to your own mistakes. No matter how many times you read the document, your mind wants to add the missing word even though it is not really on the paper.

P.S. If nobody is available to read your work, set it aside for a couple of hours or overnight. Reading it with a fresh perspective will help you catch errors and make improvements.

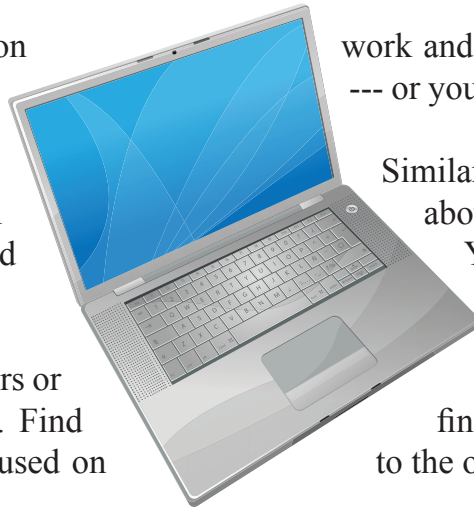
P.P.S. In reviewing an organization's mission statement I am surprised how often I notice a typo.

THE COMPUTER ON YOUR DESK

A board member thought it would build relations with staff if he forwarded jokes and cartoons by e-mail. In turn, one staff member sent it to another in the office. She filed a sexual harassment suit against the organization.

Some staff think the computer on their desk is their own. It is NOT – it belongs to the organization. Using it for inappropriate Internet surfing and e-mail exchanges should be discouraged or prohibited.

If you receive jokes from volunteers or colleagues, do not forward them. Find a way to tell senders you are focused on



work and don't have time to read extra mail --- or you find them distracting or distasteful.

Similarly, there are, or should be, policies about adding or downloading software.

You do not want a visit from the software police asking to see the licenses for every program loaded on your computer. The fines are significant and embarrassing to the organization.

HIGHLIGHTERS ARE YOUR BEST FRIEND

In many solicitation letters, the first line the recipient reads is the bright red text or yellow highlighted sentence. Compared to a letter composed of black type on white paper, the highlighted letter is more likely to gain a response.

To emphasize the important points of a letter or article, use a bright highlighter. This is a way of personalizing the communication and showing the reader that you want them to see a specific message or answer to their question. You save them time - a precious commodity for volunteers.

For prospective members, send out membership information highlighting the available solutions to why they called. You'll be appreciated for helping them immediately see the important parts of your materials.

Be cautious not to overuse highlighting or underlining – do it just enough to bring the reader's eyes to the most important fact on the paper.

If you are using a color printer or PDF document, you can use the highlighting feature in the word processing program.

Text boxes and callouts are other word processing features for emphasizing a point or call to action. By repeating important text in a box you make sure the reader sees the information.

P.S. The second most read and remembered part of a letter is the postscript.

P.P.S. When you give a board member a leadership manual also give them a highlighter. It increases certainty of reading and retaining key information.

MEMBER SERVICE EXCELLENCE

“If the members will stop calling the office I could get my work done.” If you’ve heard this in your office it is time for a discussion on customer service.

The organization exists because of and for the members. The responsibilities of staff revolve around serving the members. They are not an interruption of the work day.

It is the organization’s responsibility to create a user friendly environment for the members who call or visit.

To remind staff of the need for service excellence, discuss and adopt a member customer service pledge of excellence. Consider the following:

As a professional, I understand that it is my responsibility, purpose and pleasure to create favorable and memorable experiences for each and every member. To



achieve this, I promote these principles in our membership organization:

- Apply a “3-ring/24-hour rule” – answering phones within 3-rings and responding to members’ needs within 24 hours.
- Thank members for belonging to the organization; recognizing that membership is a choice; and by realizing that my attitude can influence their decisions to renew.
- Use members’ names as often as possible when asking about their needs and satisfaction with the organization.
- Find ways to offer assistance at every opportunity and by asking, “Is there anything else I can help you with?”
- Treat inquiries from prospective members as opportunities to invite them to join and participate.
- Express a positive attitude that is noticeable in phone conversations, correspondence and personal contact with members.

Signature X _____

SLIPPERY ANSWERS

The member asked, “Did you get my newsletter article, and when will it be printed?” I heard the staff member reply, “I think so and it should be printed in an upcoming issue soon.” I thought it sounded vague so I asked the staff member if he had received the article. Come to find out, he hadn’t received the article and didn’t know much about the newsletter’s deadlines --- he replied with what I call a “slippery answer”.

Slippery answers come from staff members who don’t know the facts. Sometimes it is called doubletalk. Instead of speaking about facts, the staff member focuses the conversations on pleasantries and jokes. The member is left without the vital information they are seeking and the staff member missed the opportunity to be a knowledge-based professional.

Make it a practice to listen carefully to member questions and then get the answers they need. A vague reply leaves them in the dark. If you don’t know the answer, don’t brush the question aside.

Offer to find the information and let them know you’ll be replying with the details within a certain timeframe – they will appreciate your thoughtfulness and follow through.

If you don’t know where to find the answers, ask yourself why and get help from a supervisor and colleagues. Be an active learner by listening carefully, reading materials and through osmosis...the act of absorbing knowledge that occurs naturally in your organization. (You’ll learn by hearing conversations, phone calls, reading manuals, etc.)

Maybe you’ve heard of the saying, “We have two ears and one mouth so that we can listen twice as much as we speak.”

P.S. Some organizations require the staff member who receives the request or question to “own” the task until the inquirer gets a response. This eliminates transferring a member from person to person and not knowing if the inquirer received a satisfactory answer. You never want to hear, “It’s not my job.”

EXCUSES, EXCUSES, EXCUSES

If you hear any of these phrases in your organization, it might be time for a staff meeting.

- Sorry, we ran out of membership applications weeks ago.
- But I thought the insurance agent automatically renewed our policies.
- Excuse me, you want what --- its called a 990?
- I left the computer back-up tapes for the week on my desk – why, what happened?
- Sorry - I don't know and the staff is at convention, can you call back next week?
- How would I know the article I “borrowed” was copyrighted?
- We don't really have time for a board orientation at this meeting, maybe next year.
- Ah, we tried that once and it didn't work.
- You should serve on the board, there's nothing really to the job and you'll be reimbursed for travel to nice facilities!
- I thought the typesetter was paid to proof it!
- Has anyone seen last year's taped recordings of our Board meetings – I can't seem find them and I like having the back-ups.
- No I didn't call the hotel's 800 number in the convention brochure

before I approved printing 40,000 brochures. You mean it's wrong?

- I just didn't think we had to proof the T-shirts for spelling, too.
- I never realized I left out the hotel's phone number in the registration brochures. I wonder who answers the phone at the wrong number – maybe they can tell our members the right number?
- I know I took the call, but I thought you would follow up on the member's request.
- It's not my job.
- I don't work for the membership department.
- It is not our job to do that for you.
- So what if they don't renew their membership?
- Can you call us back; that person isn't in right now?
- Who's on the phone? I don't have time for members calls – transfer them to voice mail.
- Who cares if she is a board member?
- That's how we have always done it here.
- Have you tried finding it on the Internet – it's always a good source of information when the association office strikes out?
- We can't be held accountable because we are relying on volunteers!

SHOP YOUR ORGANIZATION

Some businesses rely on a secret-shopper to measure staff effectiveness and customer service. Imagine your next phone call being made by a secret-shopper posing as a prospective member. How confidently and effectively could you “sell” the prospect and bring closure to the call?

It doesn't take much to discourage a member from joining or renewing. Perhaps they call the office and the phone rings “too many” times --- or they get “lost” in voice mail. Or maybe they check the Website several times and find the page they need reads, “Under Construction.”

Here's what a secret-shopper would look for in a membership organization:

1. Reachability – Was the phone answered within three rings? Did voice mail take over? Was there a live person on the phone? Did the member get a call back by the end of the day?
2. Greeting – Did the staff member make it sound like the member was an interruption? Could you “hear” a smile on the phone? Was the member made to feel like a VIP?
3. Solution – Most callers are seeking information or an answer to a problem. If they hear you say, “I'm sorry, the lobbyist is out for the rest of the week, want me to have them call you next week?” you can imagine the member found their answer at a competitive organization that was better prepared, or on the Internet. Be prepared to offer solutions within 24 hours or by the close of business. A quality organization anticipates members' needs.
4. Closure – Did staff thank the caller for contacting the office and ask, “Is there anything else I can help you with today?”

P.S. Create an Answer Book for every desk or a FAQ section on the website. It provides the answers to the 25 most commonly asked questions by members. Share it with the board so they too can answer members' questions.

MAKE THEM VIPs

You know the feeling of walking into a hotel and the first person to greet you is the bellman that says, “Welcome back Mr. Harris!” He may have known it was my second visit, but chances are he made a calculated guess. It sounded better than asking, “Is this your first time here?” He knew my name because it was on the luggage tag.

When I got to the front desk, the clerk said, “We have an especially nice room for you with a view. I think you’ll like it.”

The scenario has been nearly perfected by the hospitality industry – making their guests feel special. How can you replicate that feeling for dues-paying members?

- Give registrants the red-carpet treatment by placing a red carpet in front of the registration desk.
- Place a bouquet of fresh flowers on the registration desk.
- Stand-up as members approach the desk, make eye contact, welcome them to the meeting and shake their hands.
- If the line at the desk is long, make eye contact with

members, acknowledge them and let them know you’ll be with them shortly.

- Place a bowl of candy or fruit on the registration desk and invite members to partake.
- Make registrants feel special with affirming statements like, “You’re really going to enjoy the education” or “We’ve arranged some great entertainment and meals.”
- Stamp every member registration packet with bold red ink reading, “V.I.P.”



P.S. If your convention is large enough, you will be setting up a comfortable registration area with concierge desks. If you have elite categories of members (i.e. membership of 20+ years; 10 years perfect conference attendance; early registrants, etc.) set up a special line or registration area with signage that encourages other members to attain the same VIP status.

THE BENEFITS' PORTFOLIO

Study the organization's mission statement. Compare and contrast it to the member benefits and services. Some organizations offer a list of benefits with little relevance to the mission. Focus resources on developing and delivering benefits and services of relevance to the membership.

Most organizations market membership by promoting the value of belonging.

To promote the benefits of belonging, consider all of your member benefits, products and services as your organization's portfolio. If you don't know the value of the portfolio, ask a task force to review the benefits to determine value compared to the cost of annual dues.

Promote the value of membership by creating a "value statement." The statement items all the benefits, activities and services and quantifies their value. Thus, if a member had paid \$300 in dues, the amount may be offset by his or her participation in educational programs, purchases, affinity programs and the value of lobbying.

Customize benefits according to categories of members.

Promote separate benefits portfolios for regular and associate members.

You can further customize member benefits by the characteristics of members and their special needs --- for example an independent business will need different services than a franchise; similarly a new business has different needs than an established one.

P.S. A task force should review the benefits' portfolio regularly to be sure members' needs are satisfied. Member needs and satisfaction surveys should be conducted at least every two years.

ASK FOR FEEDBACK

Walt Disney World© has a guest feedback card titled, “We’re All Ears.” It doesn’t matter how you phrase it.... “We’re Listening to You,” “Member Satisfaction,” or “We’re All Ears,” asking members, customers and stakeholders for their input is critical to effective operations.

You may hear the leadership say, “We know best what the members need.” That phrase should be countered with, “Our members know best what their needs are --- and we should ask them often.” Don’t be surprised to hear this question from prospects:

“What do you know about me?” They want to know that you listen to their needs, catalog their issues and interests, and take them into account when making decisions.

Ask for feedback and satisfaction levels continuously. Use technology to offer on-line surveys that tabulate themselves and change frequently. Use focus groups, e-mail distribution and newsletter inserts for frequent member surveys.



You need to know what members are thinking --- and they need to know that you care about them continuously, not just when they join or you want their renewals.

It may not matter whether members return your surveys. Often what is important to members is that you cared enough to ask their opinion. If they don’t return the comment card, that’s natural. Continue to survey members and other stakeholders to ascertain their needs, and communicate that you care about them.

P.S. Design a simple postage paid reply card titled, “How Are We Doing?” Keep it next to the postage machine and insert it in periodic mailings. Encourage staff to initial outgoing cards and reward them for every member card returned. Keep them in the file to share with the board.

RECOGNIZE OPPORTUNITIES

My first boss insisted I learn to prepare the organization's monthly newsletter. I resented it, thinking it wasn't part of my job. Ironically, every subsequent job included a responsibility for newsletters. What I learned from my first boss benefited me greatly.

Look for the seeds of knowledge planted by your boss and colleagues.

You increase your worth to the organization by learning how to handle responsibilities beyond your job description. The organization is stronger when employees are cross-trained.

If someone asks you to publish the newsletter, sell memberships, enter a database or visit the capitol, realize it might be the seed that increases your value and sets you on a new direction.

Nonprofit organization staff members are in a profession with broad opportunities. Many become lobbyists, chief executive officers, department heads, publishers and elected officials.

P.S. I've had many employees return years later to say they didn't understand why I asked so much of them, until they were in a new job and realized the value of what they had learned. My employment philosophy is that it is not important how long you stay, but how much you learn while you are there.

SERVING ON A TEAM

I often say to board members, “No one person is more important than another at the board table.” Though some directors may have a title, such as officers, it takes the board as a whole to govern the organization. Similarly, the staff should act as a team to manage the organization.

Working on the organization’s staff, you are part of a team. Whether there are 100 on staff or just two persons, there will be times when you will have to pitch in to get the job done. You have the opportunity to add value and make a difference by being an eager member of the team.

You will be called on to help stuff name badges or staff the registration desk. Though you believe it is outside of your formal job description, it is part of being on the team.

The employee who closes their door, never helps out, and resents being asked to cooperate in other areas of responsibility misses opportunities for growth.

By being a team player, you’ll find the staff eager to reciprocate if you need help. You increase your value, build your knowledge and skills.

P.S. We make choices each day at work to be positive or negative, to enjoy or dislike your colleagues, to express appreciation or to scorn your position --- you’ll be happier, your colleagues and the organization too, if you work as an enthusiastic member of the staff.



RESPECT CONFIDENTIALITY

Have you ever heard a staff member answer the phone with, “I’m sorry, he is away on vacation for another week.” Or an equally inappropriate disclosure, “She’s at a doctor’s appointment and will be back tomorrow.”

Working in an office requires that you respect at least two forms of confidentiality: information about fellow staff members and the organization’s inside information.

In the comment about the staff member on vacation, the phone receptionist could have responded, “Sam is out of the office and Sally is taking his calls, may I transfer you?” (The fact that Sam is on vacation is privileged information.)

In the comment about being away for a medical appointment, that is simply private knowledge that would not be disclosed for any reason. Protect the privacy of colleagues and their personal data.

The second application of confidentiality is that of the organization’s information for which you are entrusted.

You will see financial reports, member lists, legislative positions, complaints filed against members, program evaluations and survey responses. The information is the intellectual property of the organization and should not be misused or inappropriately shared.



CONFIDENTIAL

Finally, only a few documents in a not-for-profit organization are public. Learn what documents are required to be made public, based on law and policies, and which documents should remain private.

P.S. Orient board members that reports and information are provided for the purpose of governing. Information should not be left on the table after meetings, distributed inappropriately, or left in the seatback pocket on an airplane.

MINI FILE-KINGDOMS

*If the elected chairman of the board walked in your office and said, "I'm here to audit the files," how would you fare?
After all, the information belongs to the organization and staff members are simply its stewards.*

Information belongs to the organization and should be maintained in a format that any and all staff can access easily (except confidential information).

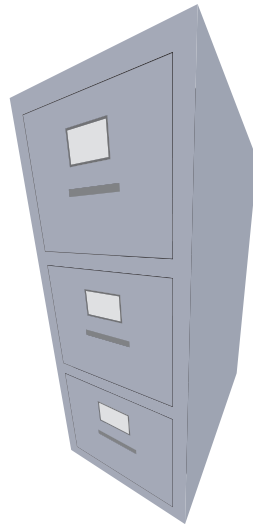
Consider these tips to be sure information can be retrieved by anyone in the office --- from the executive director to the newest receptionist.

- Establish a central file system so that everyone knows where files are properly stored.
- Clearly label file folders and drawers; consider color-coding folders.
- Adopt a record retention schedule and purge files annually.
- Only add information to folders that has value.
- Establish a means to store information on a server. Backup the server regularly and safeguard the backups.
- Realize that the information belongs to no one person in

the organization --- it belongs to the organization itself and should be maintained as if the chairman of the board were dropping in today.

- As systems develop, create manuals to catalog your organization's best-practices and standards.
- Include digital and electronic file management

P.S. IRS Form 990 asks if the exempt organization has a record retention schedule.



FOCUS ON THE MISSION

I've asked many staff members to recite the organization's mission statement. Their response is silence. Some staff reply with, "What's a mission statement?"

The organization has a primary focus or purpose succinctly summarized in the mission statement. The statement is usually one to three sentences identifying the organization, the members served and the services offered. The founding fathers (and mothers) built the organization upon the mission.

Whether you know it or not, your position and responsibilities fit within the organization's big picture mission.

Take a minute to find, read and consider the mission and how it affects your job. Discuss it with a supervisor or staff as to how your position helps to achieve the mission

Staff and volunteer leaders should be passionate about the mission

Display the mission at board meetings and in the office. Add it to meeting agendas as a footer or on the cover of the board packet. Print it on the back of your business card.

The organization may also have a vision and/or values statement. A vision statement is an aspiring view of what the organization could be to members in the future.

The values statement identifies the guiding principles of the board and staff, for instance: integrity, collaboration, transparency and diversity.

P.S. Avoid "mission drift" by referencing and promoting the mission statement often.



CELEBRATE CULTURE AND DIVERSITY

I watched association staff members dine at a Japanese steakhouse. It was interesting to see who demanded to use forks and who willingly tried chopsticks for the first time. Each person emanated a message about his or her cultural sensitivity and acceptance.

There will be situations in which you may feel some discomfort due to unfamiliarity or cultural differences.

Look at these situations as small tests that can be overcome with an enthusiastic outlook. Avoid making a scene --- handle things as if you are a willing player. In the above scenario, pick up the chopsticks and give them a try. If they don't work out, you'll be offered a fork.

There are people (members, volunteers and colleagues) who will make their impressions of you based on how you react to the little things.

Another aspect of respecting cultures and differences relates to "diversity" and "acceptance". Organizations that appear to be elitist or do not serve the needs of *all* members often see splinter groups form. Staff members can promote inclusivity

by reaching out to all interests, cultures and member categories, making it clear that differences are respected and encouraged.

Consider adopting a diversity statement and publishing it on your organization's Website and in the membership brochure.

For example, "The organization values and seeks diverse and inclusive participation within the [community, trade or profession]. It promotes involvement and access to leadership opportunity to all members regardless of race, ethnicity, gender, religion, age, sexual orientation, nationality or disability. The organization will continue to provide leadership and commit time and resources to advance this objective. It will develop strategies and initiatives to promote and welcome diversity within the board, staff and membership of the association, as well as provide tools for its members regarding diversity."

MAXIMIZE RESOURCES

When I moved from Washington, D.C. to Tallahassee, Florida on the first day I knocked on the door of the Florida Society of Association Executives. It was a resource I was sure could be of help to my association management career. I've been a member for more than 25 years.

Look for resources that will accelerate your career success. Organizations, institutions, publications and people can facilitate your learning curve and professional advancement.

In Washington, D.C., I relied on the U.S. Chamber of Commerce and the American Society of Association Executives for seminars, answers to questions and valuable publications. They helped me avoid mistakes.

Get to know the people and resources available to you. Don't try to go-it-alone. Turn to other institutions and individuals who have the experience

and information you need to be the best you can be.

Attend seminars, read publications and newsletters, and utilize on-line services. Resources are like aces in a deck of cards. Identify the most valued to your career and establish a link so they'll be there when you have questions or need help.

P.S. It is acceptable to share ideas and programs from other nonprofit organizations so long as it is not copyrighted material. You can always run with an idea and make it even better than what you received.

BE A TREND WATCHER

I have always been interested in monitoring news, articles, events and books to indentify future trends. Through my career, I learned a great deal about how to identify trends in the books Future Shock, MegaTrends and The Popcorn Report.

Members expect organizations to be alert to current affairs, trends and key indicators. As a staff member, make time in your day, your commute or at home or the gym, to scan trade and professional journals that your members read. Select several newspapers, magazines and websites to scan for news affecting your organization directly or indirectly.

Watch for articles and ideas that can be adapted to your organization. Look for news about members and the trade, profession or community. The more you read what members are also reading, the easier it will be to communicate with them.

Consider using a news clipping or internet search service.

Be certain to read your organization's publications and Website updates. From the monthly newsletter to the leadership manual, the information is important to understand. You can best position yourself by knowing as much as, or even more, than your members know.



CARRY PEN AND PAPER!

I've attended many meetings where volunteer leaders or staff members sit down to listen and then say, "I forgot to bring paper and pen, do you have something I can borrow to write on?"

When attending meetings, bring paper and pen. If you arrive without a notepad it appears that you came with no intent of learning or working.

It's best to carry a leather portfolio to organize your paper, pen, additional pages and business cards. It becomes part of your image and people realize you are prepared for the meeting. If you use a personal data assistant (PDA) to take notes, be

aware that nobody really can tell what you are doing at the meeting. Using a notepad, others can see that you took down the major points. Using a phone to read e-mails during a meeting is counterproductive to work and learning.

P.S. Your boss will appreciate it when you carry a notepad to lunch in case he or she makes suggestions or asks that you take notes.



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