



The Hats You Wear!

Membership, Finance & Law

November 5-6, 2007

ASAE & The Center's Marriott Learning Complex

Ronald Reagan Building and

International Trade Center

Washington, DC



asae & the center
for association leadership

www.asaecenter.org/hatsdc

Be a know-it-all.

Let's face it, association executives are expected to know a lot about many different subjects. **The Hats You Wear** will help you rise to the occasion and stand a head taller than the crowd. Put on your thinking cap and join us for this informative two-day program that covers the essentials of membership, finance and law.

Who should attend?

You should, if you're:

- A small staff association professional
- Gearing up to take the CAE exam
- Working to expand your resume and skill set outside your current position
- Someone who needs a refresher course on some core proficiencies
- Looking to get an edge on your competition



Workshop Structure

Three sessions will be held concurrently, with each repeating on the second day. The three-hour workshops include:

- Mini-lectures
- Exercises/case studies
- Small and large group discussion
- Q&A sessions
- Takeaways such as templates, plans and models

Session schedule *(subject to change)*

Day One—November 5

7:30 – 8:30 a.m.	Continental Breakfast & Registration
8:15 – 8:30 a.m.	Welcome remarks
8:30 – 9:15 a.m.	General Session: Introduction and Overview— The Greatness of Our Profession
9:30 a.m. – 12:15 p.m.	Concurrent Workshops <ul style="list-style-type: none">• Finance: The Bottom Line• Law: A Solid Foundation• Membership: Recruitment & Retention
12:15 – 1:00 p.m.	Lunch: Small group discussions (optional)
1:00 – 3:45 p.m.	Concurrent Workshops <ul style="list-style-type: none">• Finance: Play Money• Law: Drilling Down• Membership: Trends & the Future
4:00 – 5:30 p.m.	General Session: 10 Things I Wish Someone Had Told Me about Association Management
5:30 – 6:30 p.m.	Reception: Time to Don Your Party Hats

Day Two—November 6

8:00 – 9:00 a.m.	Continental Breakfast
9:00 – 11:45 a.m.	Concurrent Workshops <ul style="list-style-type: none">• Finance: The Bottom Line• Law: A Solid Foundation• Membership: Recruitment & Retention
11:45 a.m. – 12:30 p.m.	Box lunch: small group discussions (optional)
12:30 – 3:15 p.m.	Concurrent Workshops <ul style="list-style-type: none">• Finance: Play Money• Law: Drilling Down• Membership: Trends & the Future
3:30 – 4:30 p.m.	General Session: Hats Off to You!
4:30 – 5:30 p.m.	Happy Hour at Aria Bar and Grill – the first drink's on us!



Welcome!

Monday, November 5
8:15 – 8:30 a.m.

Good morning! Please join us for breakfast as we welcome you, go through some housekeeping notes and get the program started.

Your Hat hosts:

Michael Gardner,
executive director, Gypsum Association

Jimelle F. Rumberg, Ph.D., CAE,
executive director, Ohio Podiatric Medical Association

General Session
**Introduction and Overview—
The Greatness of Our Profession**

**Monday, November 5
8:30 – 9:15 a.m.**

Association management is one of the noblest professions in America. Yet when you wear multiple hats you may feel like you're jumping from task to task, hardly advancing a mission or the profession. It is important to remember the rich history and rewards that come from association management. Join us for an overview on how US associations compare to other countries, the evolution and purpose of our profession, the increased scrutiny on nonprofit management and the opportunities that abound!

Content Leader:

Robert Harris, CAE, president and CEO, Nonprofit Center, Inc.





Concurrent Workshops: Finance

It's all about the bottom line! No matter how noble your cause or mission, without a healthy financial picture, associations and other nonprofit organizations could run into trouble. Understanding the financial workings of your organization—and how what you do affects the bottom line—is a critical skill for all positions.

Pre-registration for these sessions is required as space is limited. People attending The Bottom Line in the morning will be given priority at that afternoon's Play Money. To register, please e-mail Libby Bingham at lbingham@asaecenter.org or call 202-326-9507.

The Bottom Line

November 5, 9:30 a.m. – 12:15 p.m.

November 6, 9:00 – 11:45 a.m.

Spend time reviewing the basics of financial information, terms and concepts that will allow you to keep your eyes from glazing over and reminiscing about why it was that you got that comparative religion degree in college. By the end of this session, you will feel comfortable throwing around such weighty words as revenue, accrual accounting and cash flow.

Content Leader:

Robert B. Batarla, CPA, chief financial officer, National Recreation and Park Association

*Play Money

November 5, 1:00 – 3:45 p.m.

November 6, 12:30 – 3:15 p.m.

Put your financial acumen to the test! Designed for non-finance oriented managers and supervisors, this board game will lead you through the amusements of budget building and interpretation, as well as financial reporting. Working in small teams, explore the financial implications of your actions (or inaction). Leave with a more tangible understanding of the terms and concepts that are key to non-profit management. Even if you're not a "numbers" person, this exercise will exorcise your fears and allow you to comfortably shine in a room full of financial stars.

Content Leader:

Soraya Tarrants, managing director, netXperts LLC

**While not required to attend the morning session, an understanding of the concepts presented during The Bottom Line is a pre-requisite to playing the game. If you think you've got that covered by way of your degree or work experience, excellent...we just don't want anyone missing out on the building blocks that will make this session successful.*



You've heard about the great benefits **Circle Club** offers you and your organization, and now we've expanded them! We now offer **10 different package options** designed to meet your needs based on staff size, geographic location and learning preferences. When you're a member of the Circle Club, your entire organization has access to a wide variety of educational programs, knowledge resources, a number of individual memberships, plus the convenience of making one annual payment for everything! Contact Catherine Wemette at 202-326-9518 or cwemette@asaecenter.org.





Concurrent Workshops: Law

Have you ever found yourself negotiating contracts, debating the wisdom of selling members' information to others or unsure when to call in legal expertise? If so, then you're like many association professionals whose career path has taken them into the legal realm without a degree for guidance. These two sessions will clarify questions and help you to feel confident that you're doing the right things!

Association Law and You – A Solid Foundation

November 5, 9:30 a.m. – 12:15 p.m.

November 6, 9:00 – 11:45 a.m.

There are a host of legal sticky wickets that need to be negotiated but knowing the essentials can help ensure your organization is operating within the law. Get an overview of some of the terms that will keep you in the know and out of trouble, then spend time exploring such matters as contracting do's and don'ts, safe-guarding member privacy, hiring and firing, whistle-blowing and ways to minimize risk for defamation, libel and slander. Leave this session knowing the basics of how you must conduct business in order to be in compliance with the laws that rule our world.

Content Leaders:

Eileen Morgan Johnson, Esq., counsel, Whiteford, Taylor & Preston LLP

TBD

Association Law and You – Drilling Down

November 5, 1:00 – 3:45 p.m.

November 6, 12:30 – 3:15 p.m.

You can't get a J.D. in one three-hour session, but you can gain familiarity with some of the more complex legal issues that can often lead to big trouble down the road. Whether it is protecting your intellectual property, understanding what constitutes anti-trust activity, dealing with compensation arrangements and conflicts of interest, or creating record retention and destruction policies, you'll leave knowing how to keep a vigilant eye and when you should call in the legal cavalry.

Content Leaders:

Eileen Morgan Johnson, Esq., counsel, Whiteford, Taylor & Preston LLP

TBD

ASAE & The Center Bookstore's Suggested Reading List

Association Law Handbook, 4th Edition: A Practical Guide for Associations, Societies, and Charities—by **Jerald A. Jacobs, Esq.** The desktop legal reference, updated in 2007, includes the latest updates that impact associations. Includes CD-ROM of 25 customizable legal documents. \$134.95

Professional Practices in Association Management, 2nd Edition: The Essential Resource for Effective Management of Nonprofit Organizations—edited by **John B. Cox, CAE**. Our latest edition is your single-volume resource for strategic and day-to-day responsibilities of association management professionals. \$59.95

The Decision to Join: How Individuals Determine Value and Why They Choose to Belong—by **James Dalton and Monica Dignam, ASAE & The Center Industry Research**. Ready to understand why people choose to affiliate? Use our all-new research publication to strengthen your strategic membership plan. \$69.95

Financial Management Handbook for Associations and Nonprofits—by **Craig Stevens, Kate Petrillo and Dawn Brown**. Face the challenge of today's complicated financial management rules and the need to skillfully budget and manage your organization's future with this essential guide. \$49.95

View additional titles and resources at www.asaecenter.org/bookstore.





Concurrent Workshops: Membership

Associations and other nonprofit organizations rely upon membership dues and participation to stay relevant and profitable. Whether or not your title has the word in it, be assured that membership is the lifeblood of your organization.

Recruitment and Retention

November 5, 9:30 a.m. – 12:15 p.m.

November 6, 9:00 – 11:45 a.m.

Understand who your members are and how they contribute to your organization's success. Explore ways to position your organization to effectively meet and even exceed the needs of your audience while maximizing your own ROI. Review different membership categories, benefits and services and the basics of dues structures. How does the membership department function—what are their responsibilities and how can technology aid in achieving them? Leave this session with ideas on how to increase recruitment and retention at a core level, manage the organization, improve performance and keep your members coming back for more.

Content Leaders:

Matthew Baehr, PHR, director of membership development, InfoComm International

Steven M. Rauchenecker, CAE, FACHE, VP, marketing and sales, CCIM Institute

Trends and the Future

November 5, 1:00 – 3:45 p.m.

November 6, 12:30 – 3:15 p.m.

Examine how to use strategy and research to find better and more targeted members and ideas on how to keep those members engaged. Discuss new and emerging dues structures and recruitment strategies. Explore how to create sustainable membership growth by understanding your current members and ensuring the relevance of your organization into the future. Leave with ideas on how to increase the nimbleness of your strategy to meet changes in both your membership and industry.

Content Leaders:

Matthew Baehr, PHR, director of membership development, InfoComm International

Steven M. Rauchenecker, CAE, FACHE, VP, marketing and sales, CCIM Institute

Are you ready to achieve a new level of professional growth and recognition?

The Certified Association Executive (CAE) program is designed to elevate professional standards, enhance individual performance and designate association professionals who demonstrate the knowledge essential to the practice of association management. For more information, visit www.asacenter.org/CAE.





General Session:
**10 Things I Wish Someone Had Told
Me about Association Management**

Monday, November 5
4:00 – 5:30 p.m

From antitrust avoidance to creating structure, there is a long list of competencies that would probably have been helpful to have had at the start of your nonprofit career. Often knowledge comes the hard way, like standing in front of the FTC for something a member wrote in a newsletter. While the list of 10 tips is ever changing, it always includes organizational structure and framework, the six manuals needed by every association, risk avoidance, the importance of effective board orientation, mission creep and much more. Leave with the resources and rationale for applying the information to better your career and your organization.

Content Leader:

Robert Harris, CAE, president and CEO, Nonprofit Center, Inc.

General Session: Hats Off to You!

Tuesday, November 6
3:30 – 4:30 p.m

Got a bee in your bonnet about some lingering issue or question? Don't keep it under your hat – gather for facilitated discussion around the topics of nonprofit management and organizational behavior. You'll deserve a feather in your cap if you can apply some of the skills and information you acquired over the past two days to helping find ways to overcome obstacles and challenges. Don't keep the secrets to success under your hat, throw it in the ring and share your take-aways, engage in lively discussion on practical issues and offer your own insight into global trends. We know it's the end of the day, but if this doesn't offer you something substantive to go home with, we'll eat our hats.

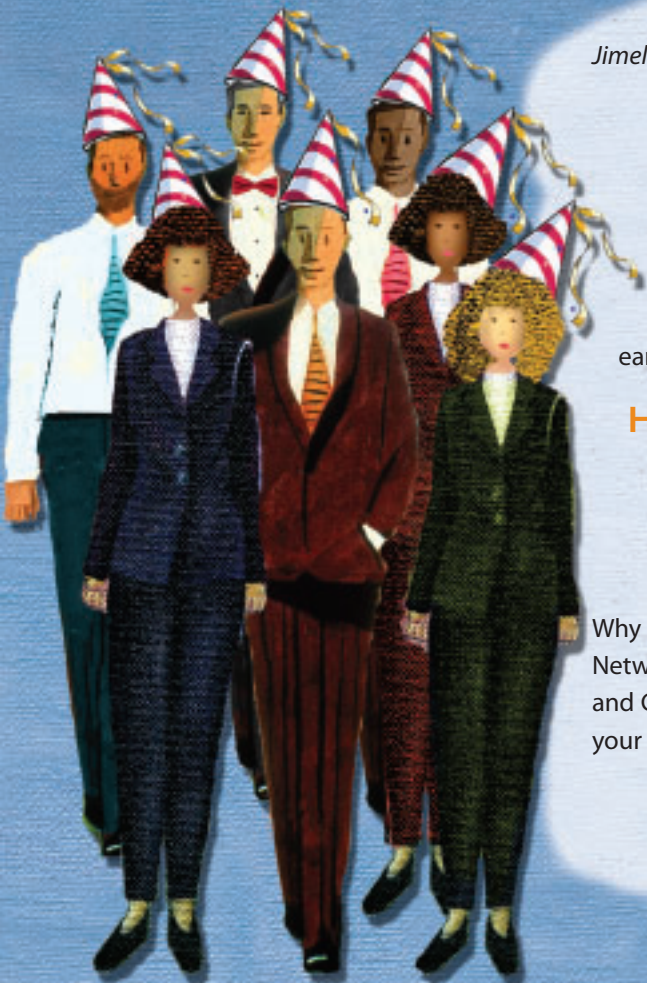
Content Leaders:

Michael Gardner, executive director, Gypsum Association

Check out our Knowledge Center!

At asaecenter.org, you have access to thousands of resources to help you do your job more effectively. ASAE & The Center's members may call 202-326-9559 or e-mail our Knowledge Center resource staff, knowledgecenter@asaecenter.org for customized research services on topics related to association management.





Jimelle F. Rumberg, Ph.D., CAE, executive director, Ohio Podiatric Medical Association

Time to Don Your Party Hats

Monday, November 5

5:30 – 6:30 p.m.

Please join us as we blow off some steam after a long day of learning! Trade in your thinking cap for a jaunty chapeau and join your fellow learners in a well-earned bit of fun.

Hold onto your hat—we've still got something fun planned for you...

Tuesday, November 6

4:30 – 5:30 p.m.

Why rush off? The Small Staff Association Committee and the Greater Washington Network's CAE Action Team invite you to join them for a drink and a nosh at Aria Bar and Grill. You'd be mad as a hatter to miss out on this opportunity to connect with your peers...and the first drink's on us!



How to register

Online: www.asaecenter.org/hatsdc

Phone: 888-950-2723 or 202-371-0940
(in Washington, DC)

Registration Fees

\$695 ASAE & The Center Members

\$895 Nonmembers*

*Nonmember rate includes a complimentary one-year ASAE & The Center membership. For more information about becoming a member, please contact the Member Relations Team at mbrdev@asaecenter.org or 202-626-2727.

Two Heads are Better Than One

With so much content to absorb, having an extra pair of ears around is not a bad idea. To facilitate this, we have arranged it so that when one person from your organization registers, all subsequent colleagues from the same organization may register for \$395—that's almost half off the regular member rate! And, subsequent non-members can register for \$595. To take advantage of this offer, please contact Member Services at 1-888-950-2723 (in Washington, DC, 202-371-0940).

Confirmation

You will receive confirmation of your registration via e-mail.

Cancellation Policy

Attendance cancellations must be received within three business days before the program begins. A \$75 cancellation fee will apply. There are no refunds for cancellations received less than three business days before a program. No-shows will not be refunded.

Official Attendee Roster

ASAE & The Center for Association Leadership's Member Service Center must receive your registration no later than October 23 in order to list you in the official on-site roster.

Program Hours

Registration begins November 5, 2007 at 7:30 a.m. A continental breakfast will be served from 7:30 - 8:30 a.m. followed by the education programming starting at 8:30 a.m. The program ends at 5:30 p.m. followed by an onsite reception. On November 6, 2007, a continental breakfast will be served from 8:00 - 9:00 a.m. followed by the education sessions from 9:00 a.m. - 4:30 p.m., with an optional networking happy hour immediately following.

Earn CAE Hours

Earn 12 Certified Association Executive hours towards certification or re-certification of your designation.

Our Guarantee

Our goal is to provide truly exceptional offerings and service, and we won't be happy until you are. If any program, product, or service of ASAE & The Center for Association Leadership do not fulfill our promise, we will make the situation right or refund your money.

Accommodations

There is not a room block for this program. However, there are several hotels in the area, some of which offer a special rate for ASAE & The Center for Association Leadership members. For information regarding these hotels, please visit www.asaecenter.org/dchotels.



What hat
are you
wearing
today?

www.asaecenter.org/hatsdc

A special thank you to our strategic partners



1575 I Street NW
Washington, DC 20005

NONPROFIT ORG
U.S. POSTAGE
PAID
PERMIT NO 9150
WASHINGTON, DC