

# THE *Association Manager*

A Bi-Monthly Newsletter for Organization Leaders



WISCONSIN ASSOCIATION MANAGEMENT, <http://www.wamllc.net>

Volume III, Issue I, 2005

## Christopher Ruditys Purchases Robbins & Lloyd Career Training Institute:

*Educational Facility Now Available to ALL WAM  
Clients!!!*



WAM is pleased to announce that its owner, Christopher Ruditys, has recently purchased Robbins & Lloyd Career Training Institute, a

highly respected career training school for professionals that has provided real estate education in Wisconsin since its establishment in 1968. With this acquisition, WAM becomes the only association management company in Wisconsin to provide its own in-house educational facility!

"The synergy between Robbins & Lloyd and existing WAM-managed associations will be fantastic! As a result, WAM's clients will have immediate access to a high tech educational facility and conference center for seminars and workshops," said Ruditys. Conveniently located off of Highway 45, the school offers seating for 85 students and parking for over 100 cars. Near term plans include purchasing a new facility to expand and upgrade seating capacity. The educational facility will serve as a more affordable alternative to renting space in costly hotel venues. "In addition to our proven track record at raising funds for our associations, we are now able to save them lots of money by providing them with affordable, yet superior, meeting space," Ruditys added.

Licensed by the State of Wisconsin Department of Regulation and Licensing and the Office of the Commissioner of Insurance, the Institute's educational courses and instructors have been approved by the State of Wisconsin Educational Approval Board. The Institute thoroughly prepares students to pass examinations given to prospective real estate salespersons and brokers, licensed appraisers, insurance agents and mortgage loan officers.

## ASK WAM:

### Leader's Forum— It's a New Year!

Questions by association leaders, Responses by  
WAM staff

*If you have a question for the next newsletter, please e-mail it to  
[info@wamllc.net](mailto:info@wamllc.net).*

**Question:** Dear WAM: Our association has a new Board that took office effective January 1, 2005. What tips can you provide to make sure all transitional measures are taken?

**Answer:** We receive this question from many association leaders, and can provide some general reminders that we implement for our association clients.

Here are a few key points that should facilitate a smooth transition period:

- Plan a board member orientation meeting. This meeting should result in additional action items to be implemented early-2005.
- Transfer bank account and check signatory powers.

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# About Wisconsin Association Management, LLC

WAM provides superior administrative and executive services to non profit associations seeking to take their organization to the next level. With over 29 years of combined association management experience, WAM will work with your Board of Directors, committees and membership to implement programs and services, as well as alleviate the day-to-day administrative tasks that must occur for your group to be successful. We believe in **implementation**. As our satisfied clients say, "Put the administrative work in the hands of the experts and do what you do best."

*Providing Innovative Management Solutions for these Associations:*



"I think we've accomplished a great deal more this year at WCAI than in year's past and much of it is due to the team at WAM." The flow of information to our membership is much improved over what it was."

*~Tom Swan, Director for the Wisconsin Chapter of the Appraisal Institute*

## ASK WAM (Continued from Page 1)

- Remind your former board members and committee chairs to turn over their files and records to the new positions.
- Update the contact information on your website, stationary, newsletter and other communication apparatuses.
- Notify third-parties about changes in contact information (financial institutions, accounts payable, accounts receivable, website hosts, and venues).
- Finalize your 2005 calendar of events, operation's calendar (publications, advertising, etc.), budget, committee & board meeting schedules.
- **COMMUNICATION** - don't get lost in the transition, keep everyone up-to-date with regular e-mail communications and phone calls. If your association hires an association management company, the staff will assist with this process.

## CAN-SPAM Checklist

*Suzanne E. Coffman, January 2005, Philanthropic Research, Inc. (GuideStar)*

Nonprofits can still send unsolicited bulk e-mails—even commercial ones—without violating CAN-SPAM. Here is a quick checklist of steps to take to make your messages CAN-SPAM compliant:

- ✓ **Send all e-mails from a legitimate, active e-mail address.** If the recipient hits "Reply" and responds to the message, the answer should go to an in-box that is monitored, not just disappear into cyberspace.
- ✓ **Provide accurate header information and a postal address for the sender.** The "From" section of the e-mail should identify either the sender or the organization, or both. The body of the message should contain a snail-mail address.
- ✓ **Give the message an accurate subject line.** It is unlawful to use subject lines that mislead the recipient about the contents or subject matter of the message.
- ✓ **When in doubt, err on the side of caution.** If it's likely a recipient would view the message as an advertisement or promotion, put the word Advertisement in the subject line or body of the e-mail, even if the message is related to your mission.
- ✓ **Provide recipients a way to opt out of future mailings.** Either include a link to a page where recipients can remove their addresses or provide an e-mail address where they can write to have their addresses removed.
- ✓ **If someone opts out of future mailings, respect their wishes.** You have 10 days to remove them from your mailing list(s).

# Handling Disruptive Behaviors

By Leadership Outfitters, Inc.,  
<http://www.leadershipoutfitters.com>

Here is a helpful guide to help leaders manage difficult situations that may occur during a typical meeting or event:

<i>Challenge</i>	<i>Strategy</i>
Past leader dominates discussion.	Acknowledge ideas and years of experience. Ask for other's views. Ask past leader to serve in an advisory capacity on task force or work group. Give him or her purpose.
Someone is talking too much.	Ask a factual question, followed by an interpretive or evaluative question.
Two or more people are in conflict.	Don't take sides. Remind them of the points they agree upon. Remind them of the discussion objectives.
The group is becoming involved in an unimportant issue.	Ask: "How much importance should we attach to this issue?"
More discussion is needed on a particular topic.	Ask: "I wonder if we've gotten all the information needed to reach a decision?"
The discussion is wandering from the point.	Ask: "What point are we now considering?"
A summary of the group consensus is needed.	Ask: "I wonder if someone could summarize the points where we agree and disagree?"
The group is biased or acting in self-interest.	Ask: "How is our own interest in the outcome causing us to overlook the interest of other groups or individuals?"

## Legal Update

### I. Tax Exempt and Commercial Organization Joint Ventures

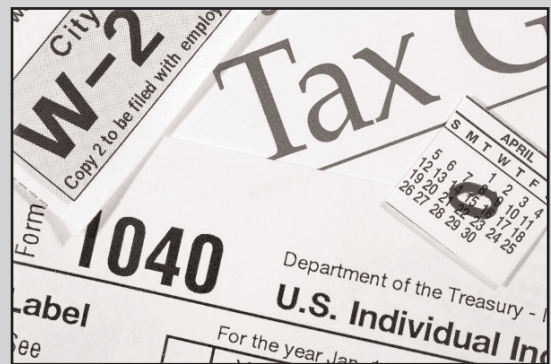
Source: *Association Management*,  
 December 2004, by Lauren W. Bright

The Internal Revenue Service recently provided valuable guidance for tax-exempt organizations regarding joint ventures with commercial business entities. In Revenue Ruling 2004-51, the IRS concluded that a tax-exempt organization's participation in a joint venture did not jeopardize the organization's tax exempt status because the character of the joint venture activity remained consistent with the organization's tax-exempt purpose. Though the ruling cannot be viewed as legal precedent, the analysis provides much needed clarity to the confusing area of ancillary joint ventures between and among tax-exempt organizations and for-profit entities. An ancillary joint venture involves a limited portion of the assets or services of an exempt organization. In her column, Lauren W. Bright explains the ruling and its implications.

### II. New IRS Application for exempt status

Source: *Association Management*,  
 December 2004

The Internal Revenue Service has released a revised application for organizations seeking 501(c)(3) tax-exempt status. The new form is intended to streamline the application process and assist the IRS in identifying potentially abusive charities. The revised Form 1023 is available online at [www.irs.gov/charities](http://www.irs.gov/charities) and is the result of extensive collaboration with the tax-exempt community and recommendations received during a public comment period. According to IRS Commissioner Mark Everson, the agency has identified the abuse of charities as one of its four service wide enforcement priorities.





## WISCONSIN ASSOCIATION MANAGEMENT

223 N. Water St., Suite 300  
Milwaukee, WI 53202  
Phone: 414-271-9456  
Fax: 414-271-6868

*Providing Innovative Management Solutions for Associations*

For past issues of *The Association Manager*, please visit . . .  
<http://www.wamllc.net/newsletter.html>.

*"A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty."*

*- Sir Winston Churchill (1874-1965)*

## *Happy New Year* from **Wisconsin Association Management**



*From left to right: Douglas Stangohr, Heather Westgor,  
Brian Parrish, Christopher Ruditys*

### *Wisconsin Association Management Provides Its Associations These Comprehensive Services:*

- Administrative & Executive Management
- Database Management
- Event Planning (Meetings, Programs, Tradeshows)
- Financial Management
- Fundraising
- Membership Recruitment & Retention
- Publications & Communications Management
- Government & Public Relations
- Web Site Development & Site Maintenance

*The Association Manager* is published bi-monthly by Wisconsin Association Management to educate association leaders about running an effective non profit association. For more information about the comprehensive set of administrative services we provide to our associations, please visit us on the web at <http://www.wamllc.net>.