

# THE *Association Manager*

A Bi-Monthly Newsletter for Organization Leaders



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

Volume II, Issue III, 2004

## ASK WAM:

### Leader's Forum

Questions by association leaders, Responses by WAM, LLC staff

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

**Question:** Dear WAM, What is Federal Form 990 and does my Association have to file it each year?

**Answer:** Just as individuals and corporations must file annual "tax returns," nonprofits must file annual "information returns." (Churches, government agencies, individuals, and businesses need not file Form 990.) Federal Form 990 ("Return of Organizations Exempt from Income Tax") and Form 990EZ compile financial information, program activities, names of board members, and other basic information. Form 990EZ is a shortened version of Form 990 for smaller organizations.

All nonprofit organizations with total annual receipts "normally" over \$25,000 must file this federal form annually (churches and government agencies do not file). If gross annual receipts are between \$25,000 and \$100,000, AND if your assets are less than \$250,000, Form 990EZ may be filed instead.

**Question:** Dear WAM, What is an association management company?

**Answer:** An "association management company" is a viable outsourcing outlet that allows you to tap into intellectual capital, industry expertise and technological capability beyond the scope of your association's current internal resources. Because of the inherent efficiencies, the cost for the services provided is more affordable and typically less than hiring a part-time or full-time staff person.

**Question:** Dear WAM, One of our committee members never attends committee meetings! This leaves us short-handed on many occasions and is starting to become a big problem for the people who actually attend the meetings. What can you suggest?

**Answer:** It is important that the Committee Chair e-mail or fax an agenda and meeting reminder to each committee member at least one week, but preferably two weeks, prior to the meeting. You should also call the committee member and ask him or her if they wish to continue serving on the committee. Sometimes people take themselves off of a committee without notifying the President or Committee Chair!

However, before jumping to conclusions, please consider that it may be difficult for that person to leave their office during regular business hours. If so, be sure to let the committee member know that he or she can participate in the meeting via conference call. Alternatively, perhaps your regularly scheduled meetings can be rescheduled to fit their schedule.

When all else fails, the Committee Chair should consider finding a replacement committee member. WAM, LLC views every committee member as a future leader of your organization. It is important to nurture future leadership, and an effective committee structure is the best way to start.

#### **Wisconsin Association Management, LLC 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

## Trade Show Check List



If your Association hosts an annual tradeshow, you know how overwhelming it can be to plan a successful and well-attended event. Should you require assistance, your Association can outsource this function to WAM, LLC to plan and coordinate the tradeshow. Here are a few helpful reminders:

- Send out exhibitor sign-up form/packet
- Design parking passes (if needed)
- Fax, mail & e-mail press releases to local media
- Decide on and confirm speakers and sessions
- Decide on and order give-away and/or raffle items
- Purchase or create signs for sessions and sponsors
- Trade Show booth layout - design, assign booth numberings
- Registration list & exhibitor list - print out for registration desk
- Assign door attendant outside of session rooms (make sure attendees are registered)
- Order ribbons for sponsors, speakers, committee members
- Plan announcements and timetable for announcements
- Have questionnaires/evaluations for sessions available
- Name badges/blank name badges
- Cash for change, receipts for attendees, blank checks for emergencies
- Blank registration forms for onsite registrants
- Scissors, razor knife, tape, extension cords, name tag holders, payment envelope

For past issues of *The Association Manager*, please visit . . .

<http://www.wamllc.net/newsletter.html>.

## Top 18

# Tips For Effective Delegation That Sticks

### *5 Steps To Delegate Tasks & Responsibilities Effectively*

1. Explain the Basics:
  - a. Why the task needs to be done - where it fits in the overall strategy for your association
  - b. The expected outcome or result
  - c. The standards the task will be measured against and why
  - d. The How: discuss and agree on each step in the process and **write it down**
2. Stand back and watch them do the task. The first time through, be available for questions and to ensure they are starting right.
3. Let them do it on their own for a while and then check back to help with any procedural issues you may have missed.
4. Establish parameters and ground rules for when you want to be involved. Don't make them guess.
5. Set up a regular time for a quick status review. This works for both of you. It's easier for you to let go knowing you'll be kept in the loop at the appropriate level. And your newly empowered association member will take the ball and run with it knowing they have a specific time to ask questions and receive your feedback.

### *5 Tips To Make Delegation Stick*

1. Make sure your whole team is aware of the changes and who is responsible for what. Do this in a meeting to allow discussion and ensure clarity on the role of the new "go-to" person.
2. Realize your team members may handle some things only 90% as well as you could. So, unless you absolutely must be involved, give your team members room to make mistakes. Remember, if five people do things only

80% as well as you could, you are still way ahead and spending your time on your own high leverage work to progress the whole association. Remember, each person has their own style and set of skills. Don't worry about how they do the job, only that the outcome meets the required standard.

3. Don't revert to your old habits and take control of problems that arise. Instead, take the opportunity to teach your team member how to handle the issue him or herself and then let them do it. Only interfere in case of crisis or serious risk of loss of a member, client or outcome.
4. Don't take opportunities to "demonstrate" and outshine your member on tasks you have delegated. The more you outshine your staff, the more you will be called on and the less incentive they have to take responsibility.
5. With team members you have delegated to, ask them to bring you multiple solutions to any problems they want you to help them with. This helps them take responsibility to think creatively about their new responsibilities.

Contact Pam Bryan at 212-937-3461, e-mail her at [pam@futureresultsnow.com](mailto:pam@futureresultsnow.com) or visit her website at [www.futureresultsnow.com](http://www.futureresultsnow.com).

## CVB's . . . Your Planning Partner!

Have you ever taken time to explore the services offered to meeting and convention planners by convention and visitor bureaus? If not, you may find that it is time well invested!

WAM, LLC recently teamed up with the sales office of the Waukesha & Pewaukee Convention and Visitors Bureau to explore booking a function in Waukesha . . . and what a win-win experience it was!

Upon learning of the specific needs of the function, the CVB sales staff was able to forward a request for proposal out to the appropriate meeting facilities to learn of their availability to host the event. Each property responded directly back to the CVB with their availability and rates. This data was then merged into one document that was forwarded to WAM, LLC for their review and consideration. . . all within 24 hours! This allowed WAM, LLC to

concentrate on other projects while the data was being collected and assured that only qualified properties were responding to the business lead. Upon selecting a facility of interest, the CVB was then able to put WAM, LLC into direct contact with the appropriate facility staff to set up a site inspection and book the event.

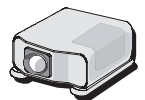
But the service does not stop there! CVBs are the planner's best resource for official, unbiased information on suppliers and services within their destination. Searching for event transportation, spouse activities, official city/Mayor's welcome, welcome bags, public relations assistance, or attendance booster ideas. . . talk to the professional partners at the destination CVB and learn how they will work with you to make your next event the best ever!

Waukesha & Pewaukee Convention & Visitors Bureau can be reached at (262) 542-0330 or found on the web at <http://www.visitwaukesha.org>.



*The Wisconsin Association Management, LLC Staff  
Top Row: Doug Stangohr, Christopher Ruditys  
Bottom Row: Heather Westgor, Brian Parrish*

## Need a Projector for your Next Event?



WAM's easy-operation state-of-the-art projector can be rented for your next event. At \$150 per day, your association can rent the projector at a fraction of the cost of other venues that rent projectors. Please call (414) 271-9456 for more info.



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*Providing Innovative Management  
Solutions for Associations*

*Do not go where the path may lead; go instead where there is no path and leave a trail. ~ Ralph Waldo Emerson*

## About Wisconsin Association Management, LLC

WAM, LLC provides superior administrative and executive services to non profit associations seeking to take their organization to the next level. With over 25 years of combined association management experience, WAM, LLC 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**. If the membership, a committee, or the Board makes a decision, we will see that decision through to the very end. When the member truly recognizes value, they will remain a member, refer your association to other potential members, and become more active.

*Providing Innovative Management Solutions for these Associations:*



*The Association Manager* is published bi-monthly by Wisconsin Association Management, LLC 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 non profit associations, please visit us on the web at <http://www.wamllc.net>.