SYNOPSIS

My experience indicates that a volunteer or nucleus of volunteers who are forming a new association will take up to two years to get the organization moving. A seasoned association professional can form the basis for a new association in about three to six months. At the end of 12 months it should be acting as a dynamic new organization.

This guide offers insights, examples, time frames and a checklist of start-up considerations for forming an association. It is also valuable for getting a developing association back on course.

Robert C. Harris, CAE ©1997
HOW TO START A NEW ASSOCIATION

One of the most rewarding ventures in association management is to transform an idea for an association into a dynamic new membership organization.

Frequently the inspiration for an organization comes from an enthusiastic volunteer, often a person considered to be the champion¹ of the cause, profession or industry. He or she might ask, “What do you think about the prospects for an association to represent ....?”

Or, you may have your own ideas for a new organization. Possibly you’ve thought about a group that does not exist or you’ve read about a new product or service that could be organized into a trade group or professional society.

I’ve had the opportunity to lay the foundation for many associations. Each was formed for a distinct reason, from the need for industry education to a desire to influence government. These examples reveal why associations form.

The Association of Mobile Self-Contained Storage Units (representing recycled semi-trailers turned into mobile storage facilities) formed for the purpose of government protection and industry image. Similarly, the United Association of Used Oil Services (transporters of used oil) organized to upgrade the image of their industry and establish government standards.

Other examples include the Florida Personal Watercraft Association (retailers and repairers of personal watercraft such as Jet Skis), organized to promote the recreational sport while attempting to dissuade local lawmakers from banning or restricting the use of the vessels. And the

¹Champion...defined as one who fights for, defends, or supports a cause.
Florida Liability Claims Institute, formed for educational benefit of insurance adjusters and defense lawyers.

The most common reason for forming a new association is to influence government. Other reasons include:

- Education
- Public Image
- Certification
- Standard-Setting
- Conference and Products or Services Trade Show
- Self-Regulation

Formation of new organizations can be readily accomplished if the proper steps are taken.

Why Get Involved with a New Association?

There are a number of reasons why one would respond favorably when asked about forming a new organization. From the perspective of the founding members, the opportunity to excel and give something back to the industry or profession is rewarding. It is also an opportunity to take on a leadership role.

For an association executive or other professional, the challenge to form an entirely new group is equally rewarding. The challenge of organizing an entire industry or profession is an exciting prospect. Few people have the stamina, skills and vision to organize at such a large level. (There is a big difference between serving a business compared to serving an industry!)

One must be able to envision the end and follow the steps to reach the objective. Along the way, the new organization will need intense help with fund-raising, organizational structure, energizing volunteers, budgeting, marketing, communications, and much more. From understanding the psychology of volunteers to knowing the consequences of tax laws, an exhaustive body of knowledge and set of talents are required. It takes a visionary individual to coordinate all the efforts.

If you do prevail in forming the organization, consider the legacy of an association that will exist and prosper long after your touch is forgotten. For many, this alone is a valid reason for getting involved with a start-up association.
For others, you may already be working at an association that desires to form a subsidiary. For example, a state or national hospital association may want to form and manage the “hospital security professionals” or the “association of in-hospital laboratories.” As is often the case, if an association does not effectively serve the needs of the growing specializations within it, members will split from the organization to form their own independent associations.

Maybe the reason you work with a new association is for the opportunity to be a consultant, lobbyist or executive director. An association management company (AMC) may form new associations for the purpose of developing its own clients without the process of competing for business.

One thing is sure, everyone involved will garner valuable insights and experience by forming a new association. You’ll be a more seasoned professional for having applied your knowledge and talents for the good of organizing. With every new association comes opportunity to gain further insights into organizational management and the human spirit.

The Primary Influences on New Associations

Beyond the many reasons for forming, new associations usually start as a result of one of three primary factors: Population, Government Regulation, or Technology. Here’s a brief description of each factor:

Population

When people relocate from state to state they leave behind old allegiances and bring new ideas with them. Sunbelt states in the US are especially experiencing above average shifts in the population and commerce. Nearly 1,000 new residents a day move to some southern states.

Government Regulation

With the transfer of power, funding and responsibility from the federal level to the state and local governments, regulators are aggressive in their efforts to pass new regulations. For example, Florida proposes 4,000 legislative bills and 8,000 rules each year. The affected individuals and businesses are left to protect themselves against new regulations and fees.
Deregulation and privatization are other reasons for organizing special interest groups and associations.

**Technology**

With technology comes new industries and opportunities. Not so long ago there would have been no association of cellular phone retailers, charter schools, or in vitro labs, for instance. Now, such associations will prosper with the right organizational structure and management. Technology also allows for new specializations and entire new industry segments as the result of new capabilities. Consider how the eye care profession has changed with the introduction of laser surgery to correct vision. The result has been the creation of a new medical specialty and surgical process.

**An Illustration**

The Florida Society of Ambulatory Surgical Centers is an example of a relatively young association that was influenced by the three factors—The state’s growing population, especially its senior population, created the need for more out-patient surgical outlets. Though hospitals could accommodate the need, they were costly and alternatives arose in the form of single-day surgery centers.

Health care reform required reduced costs in surgery and recovery, thus the surgical centers were able to perform certain procedures at prices lower than hospitals by sending patients home without requiring overnight stays. Government regulators approved the concept and continued to pass laws to enable the facilities to operate efficiently.

Finally, procedures that were traditionally performed in hospitals have been advanced by technology. Many invasive procedures have been changed by lasers and laproscopic surgery. These new procedures encouraged more surgical centers to be built... and thus the association grows.
A 12 MONTH TIMELINE

Most new association volunteers don’t know that experienced professionals are available to help. They either become do-it-yourself organizers or they start by hiring an attorney to incorporate. After that, volunteers are left to accomplish the rest.

I have seen such associations limp along for years, taking the steps for organizing one at a time. They assign critical tasks to committees who take their time and know not the urgency of the assignments.

For example, drafting the bylaws could take several months for a committee, so could the creation of a membership brochure. At the end of six months, the group is still deciding on a logo and budget. While the strictly volunteer route can be successful and is surely economical, utilizing a professional will increase the likelihood of success. A professional could have drafted bylaws in a week or so (if the right information is available) and printed a membership brochure within a month.

An association management professional can facilitate, even expedite, the formation of a new association. This is critical, considering that volunteers and new members lose interest when immediate results are not seen. Prospective members are quick to judge the strengths and weaknesses of the organization within the first year. A strong, efficient, start-up is even more essential if the organization intends to respond to a pending government regulation or create an educational conference.

Whether you are starting at the inception of an idea, or you are assisting a struggling start-up organization, both scenarios can use the help of a professional. The following outline can be used to facilitate the creation of an organization or to analyze and make course corrections to an existing association.

Four Quarters of Work

I divide the work into quarters in the first year, categorizing them as follows:

- First Quarter: Research and Organizational Basics
- Second Quarter: Leadership and Membership Development
- Third Quarter: Program Implementation
- Fourth Quarter: Evaluation and Correction

“How to Start a New Association” ©1997 Robert C. Harris, CAE (904) 222-6000
The four quarters are briefly described herein to inform you what to anticipate in a new association. It is an aggressive plan and requires genuine commitment by everyone. I recommend that you not proceed unless you determine the commitment of the volunteers and charter members.

**In the First Year**

**First Quarter - Research and Organizational Basics**

The first phase is the most important. It requires analysis and research into why the new organization should be formed. The primary question should be: “Is the mission of this group being accomplished by another association or by other means?”

After diligent research and speculation, the initial question should be answered and key documents prepared for approval and filing. From the articles of incorporation to an operating budget, many written drafts will circulate amongst the new leaders in the first quarter. Of course a crisis affecting the potential membership might be the catalyst for expediting the formation of the association.

**Second Quarter - Leadership and Membership Development**

The second phase of work requires the development of leadership in the form of a board of directors and committees. These individuals and groups will commit to accomplish the initial needs of the association.

The leadership talents and “buy-in” will spread the work-load and expedite the growth process. At the same time, membership applications should be distributed and dues should be deposited. You’ll learn the most about the industry or profession during this phase as you develop benefits and compile prospective member lists for the association.

**Third Quarter - Program Implementation**

By now the board and committees should be acting as a team and the direction should be clear for the new organization. At six months, members and interested parties will be judging the value of the association. It will be time to develop benefits and to plan for the first annual meeting or conference.
You’ve also created a communications or marketing plan to inform the members, prospective members, allies and others about the accomplishments and goals of the association. Internal and external communications is essential in the first year. Drafting a strategic plan will provide a “road map” for the organization.

Fourth Quarter - Evaluation and Correction

Towards the end of the first year you’ll start to see whether your suppositions, speculation and work paid-off. Was the mission strong enough to draw a base of members? Were communications, marketing and meetings effective? Did the industry leaders follow-through on their commitments to invest in and guide the association?

As with any good manager, the process of evaluation is essential, allowing you and the board of directors to make corrections to the direction of the association. This will also be the time when you determine whether you were successful. Not all associations succeed. There will be little reason to proceed, (collecting a second year of dues,) if the members are telling you they are not getting what they want from the new association.

The quarters may extend beyond three months each, depending on the size of the tasks, the availability of consultants, and the available resources, including volunteer labor and funding. In the early stages, member commitment is essential or each task will become more arduous for the leadership and volunteers.
AN ELEVEN-STEP PLAN

The following eleven categories outline the general steps for organizing a new association. From here, I bid you a pleasant journey. If you find yourself in a bind or need help, give me a call!

Not every activity will fit neatly into the quarters; some steps will continue beyond the quarters described herein. Some will require ongoing attention, such as membership development and budgeting, while other tasks can be completed and closed.

Let’s get started! There are scores of activities to complete and documents to process in order to accomplish a successful first year.

#1 Mission and Research

The first consideration in forming a new organization is the mission statement. The mission statement defines the market niche to which the association will cater. The statement should answer the questions, “what business are we in and who will be our customers?”

If you decide the mission is being met by another association, or can be accomplished by some other means, such as a lawsuit or the creation of a task force, then there may not be a good reason to proceed. If the mission is not able to be met by another group or avenue, then the excitement of creating a new organization can begin.

Another important prerequisite requires an understanding of what the association intends to accomplish, who will want to be members, and what services will be offered? Research what other associations exist that are similar by checking in national and state directories of non-profit organizations, ASAE, and with allied associations. For example, the executive director of the hospital association may be able to tell you if there is already an association for hospital security personnel.

By checking with other associations, you have several initial opportunities. You may find allies in your start-up efforts. You may find a group that fits the proposed mission to which you simply refer the members and make suggestion for an alliance to accomplish the mission. Or you may find the allied association is willing to take the new organization on as a subsidiary.
This is also the time to check with potential members about their interest in and willingness to join and support an association. You might want to hold a conference call or meet with a focus group to learn what they would want from a new association. It will be up to you to judge the feasibility of their expectations. Other sources for information about the potential for the association will be accountants, attorneys, lobbyists and the Internet and other professionals.

#2 Champions

Nearly every association has a champion: A person or nucleus of individuals dedicated to forming the organization. One or more of these persons will act as the informal leaders until an election or appointment formally recognizes a board of directors.

If the association has not found a champion, then one should be found as soon as possible by investigating who is perceived as the industry leader. Count on the champion to help draft the mission statement. They’ll be able to identify the potential leaders and members. They can advise as to what benefits will be valuable to the members. They may find themselves being the founder and financier to raise the initial working capital. After all, start-up funds will be needed for meeting notices, mailings, printing, and incorporation, for instance.

#3 Determination to Proceed

Thus far you should have only a month or so of work invested. After the research and identifying a champion and potential members, a determination should be made as to whether or not to proceed. Before great expenditures of time and money are invested, let this be a turning point.

If you determine that there is not enough interest by the potential members, or there is not sufficient reason for forming, now is the time to retreat. Don’t let your pride, or the ego of the champion, carry forth an idea whose time has not yet come. However, if the decision is to proceed, then by all means be ready to sink your heart into the project.

This would be a good time to select a name for the organization. Make sure it represents the mission, industry or society, and geographical scope of the group. An easy to remember acronym can be valuable for future marketing efforts.
This is also a good time to start keeping records of the meetings or minutes. These will serve to protect the association and meeting attendees from illegal antitrust actions. They also become interesting historical documents as future leaders look back at the founding discussions and participants.

#4 Organizational Structure

By the second month, or soon after, if you have an aggressive schedule for development, some critical components of the association must be determined. For example, what sort of tax status will be sought and should the organization be incorporated?

Many of the important considerations will be defined in the bylaws as you craft them. They define the structure of the organization and will serve as guidelines for future leaders and staff. Bylaws will typically include some or all of the following:

- Purposes of the Association
- Membership Categories
- Membership Qualifications
- Membership Privileges
- Board of Directors Description
- Qualifications of Officers, their Duties and Terms of Office
- Identification of Standing and Ad Hoc Committees
- Provisions for Hiring and Entering into Contracts
- Nomination and Election Procedures
- Methods for Filling a Vacancy on the Board
- Process for Bylaw Revisions
- Dissolution Processes

Most associations incorporate. Benefits of incorporation may include perpetuity of the organization and a vale of protection for the directors. If you decide to incorporate, the articles of incorporation will be similar in content and format to the bylaws. Be sure to check the corporate laws in the state in which you incorporate to include the special provisions required for not-for-profits. Both the bylaws and the articles should be reviewed by legal counsel before final adoption and filing.

Just as the bylaws spelled-out the size and duties of the board of directors and officers, now is the time to consider who will fill these seats.
The "champion" is probably the best person to make recommendations and contact likely candidates. Of course they should pay dues to serve in the association.

You might consider using an "interim board" or a steering committee the first six months of the association. This allows you to guide the organization without placing members in leadership positions who cannot fulfill their commitment or have ulterior motives to benefit themselves rather than the association.

The sooner you can appoint committees, the quicker you'll have volunteers willing to help with the start-up efforts. Committees essential to fill early in the process include membership and finance or fundraising. The mission of the group will dictate additional committees, for example, a group formed to influence lawmakers will appoint a government affairs committee.

Now is also the time to file for a federal identification number. Most banks will require the federal I.D. before they will open a checking account.

## #5 Finances

In early discussions with the champion, you had to consider whether or not the association could survive financially. If the answer was "yes," now is the time to draft a budget to identify the anticipated first-year income and expenditures.

The line items and amounts written into the budget will identify the priorities for the association. For example, a group interested in education will concentrate efforts on seminars and conferences, while a group with an interest in government reform may want to budget to hire a lobbyist.

To determine the anticipated income, consider the most common forms of association revenues. These include dues paid by regular and associate members, conference registration fees, sponsorships and advertising.

New associations usually are dependent on dues as a primary source of income until other programs are developed. Thus, you'll want to set a dues structure that will provide a solid base of funds. To determine the amount of dues paid by a member, you have to consider the total population of potential members and the likelihood of about 50 percent of them joining. A smaller number of potential members requires a much higher dues fee. Conversely, the higher the potential members, the lower the dues amount.
Expenses also help determine the dues amount. After you total all the anticipated expenses, divide them by the most likely number of members to join in the first year, and the result will be the approximate amount of dues necessary per member to finance the operations. Include in the expenses line items for basics, such as postage, printing, travel, meetings, and remember to add money for a contingency (savings) fund as well as insurance for the association and board.

Development of benefits and services for the membership will cost money. This is the time for making decisions about the number of educational offerings, the plans for a trade show, the costs of creating a certification program, and so on. The most advantageous services you offer the members (and non-members for a higher fee) will be those that generate income.

Be sure the leadership reviews the budget and understands how, and from where, the funds are to be generated. Also make suggestions (and include them in the minutes or a policy manual) as to what safeguards will be used to protect the treasury. Regrettably, there are plenty of stories of either volunteers or staff absconding with association money.

Finally, consider the budget as a guideline. It is best to create monthly financial statements. Make sure the board and treasurer are prepared to study it and understand that adjustments can be made as necessary.

#6 Physical Operations

Today's members expect a lot from the associations to which they pay dues. They want to know if there will be a permanent headquarters established for the new organization that is centrally or strategically located? Or, will the various functions of the association transfer from volunteer to volunteer each year?

While much can be accomplished on a strictly volunteer basis, it is more likely that certain operations will need to be handled by a paid staff. It is important to decide from where the membership database and dues will be billed, and where checks will be received and deposited. A new association has several options for its physical operations, they include:

Volunteer Driven

New associations frequently consider that all operations will be done by volunteers. However, it was a more popular option when members had
more free time. In today’s busy society, it is difficult to expect a volunteer to accomplish the mundane administrative tasks that are required to maintain an association. And with litigation and liability arising so frequently, a volunteer-managed association might soon find itself in trouble.

**Volunteers, Supported by Consultants, Part-Time Staff**

A more likely scenario for a new association is the hiring of consultants for specific jobs, such as lobbying or accounting, and assigning certain tasks to volunteers and committees, such as collecting dues and writing newsletters.

The advantage for a dual system of operations is economic savings. The disadvantage is a shortage of manpower to accomplish the mission and goals.

**Association Management Company**

A management company is becoming the most popular option for operating an association. The company usually offers the technology, experience and staff that will expedite the mission and goals of the association. By sharing the costs of management with other similar associations, the costs remain low while the capabilities benefit the association.

**Retained Staff**

Retaining staff to operate the association is a viable option, though the most expensive. The board will be responsible for hiring and firing, staff benefits, training, leasing or purchasing office space, and equipment. Naturally, the increased costs of full-time staffing will be reflected in the association budget and will cause the member dues to increase accordingly.

**#7 Membership**

Membership is the lifeblood of the association. As soon as possible, prospective members should be contacted about joining the organization.

First, you’ll have to create a membership application and brochure. It should include the appropriate IRS disclosures and any necessary disclaimers. Will members be able to join with a credit card? Does another member have to “sponsor” a new member? There are many pertinent questions in designing the application.
Create a membership application that can be faxed or used on an Internet homepage. In addition, now is the time for designing a brochure that describes the purpose and benefits of joining. It can be distributed by the membership committee and used to respond to inquiries about the association.

After the application is designed, a membership drive should be undertaken. The leadership or membership committee will want to consider compiling or purchasing potential mailing lists, incentives for joining, and set goals for a membership drive. It is suggested that during the first year the initial members be offered recognition as "charter" or "founding" members of the association.

This is also the time to determine what new members will receive when they join. Consider the value of a prompt reply, a member orientation kit, a certificate or plaque, and a wallet ID card.

#8 Meetings

Since associations are composed of large numbers of people seeking common information, meetings are a popular method for sharing information and accomplishing goals. They come in the form of board and committee meetings, an annual meeting (likely required by law for incorporated groups), educational sessions, conferences and trade shows.

In the early months, carefully planned meetings should be held, with well-defined agendas and the involvement of the champions or leadership. Conference calls are another form of meeting, though there are many advantages to meeting in person.

The first year calendar should include at least quarterly board meetings to handle the decision making necessary as the organization grows. Committees may want to meet in conjunction with the board.

Plan an annual meeting for either strictly business or for the purpose of education and possibly a trade show. Most members anticipate an annual convention to meet and network with colleagues. One way of insuring better attendance is by holding the first meeting in conjunction with a related group's conference. Or, you may find other associations to "co-sponsor" your first convention, adding credibility and increasing the potential attendance.
#9 Public Relations

Early in the process of formation, a news release should be prepared to announce the association, its mission, its leadership and how it can be reached for more information. Distribute it to every organization and publication that will be interested in the new association.

You should research the editors and organizations that will be interested in the new association. This list will be used frequently to inform others about the growth of the organization, milestones, awards, upcoming meetings and accomplishments. Be sure to include the allied organizations throughout the US, including newsletters and journals, state associations, and the appropriate editors in the daily and national media.

A “profile” for the new association is also advised early in the process. This is a single page document that describes the new association, describes its mission, and gives an overall perspective of the size of the industry or profession which it represents. The profile can be faxed to callers or included with mailouts and press releases. If well-written, it will be appreciated by everyone interested in the association.

Develop a logo representative of the association members and mission. Stationery and envelopes also fall under the category of public relations since these will be the most frequently transmitted impression of the association. Be sure the letterhead looks professional, giving consideration to using color, a tag-line to describe the mission of the association, and a listing of the leadership.

Because communications are part of a public relations effort, you’ll want to start thinking about what form of communication the members prefer. Some associations are giving up their printed newsletters and journals in favor of an Internet homepage. Others have created a brief newsletter that can be fax-broadcast to members. Some members will tell you they prefer to receive communiqués by e-mail rather than telephone. These considerations all become part of a communications plan.

#10 Governmental Affairs

Because many associations’ primary mission is to influence government, this operation may be advanced earlier in the first year. For some new groups, the hiring of a lobbyist is the first step they take.

There are several ways to monitor government, often influenced by
the scope of government being examined (local, state, national or international) and the capabilities of varying services. A wealthy association may simply hire one or more lobbyists, as employees, to do the research and to influence the issues. Other options include retaining lobbyists on an as-needed basis, subscribing to publications and services to help you monitor the issues as they arise, joining chambers and other groups interested in similar issues, or assigning the entire task to volunteers and committees.

Because associations are made up of members who have expressed an interest in similar issues, creating a grassroots effort for lobbying is usually effective. Associations use telephone trees, rely on members who know elected officials, and letter-writing campaigns to influence government lawmakers. Another member driven effort is that of contributing time and money to political campaigns, or creating an association-sponsored political action committee or PAC.

Position papers should be drafted. The papers will make sure that all the members understand the positions of the association. They can also be used to educate the press and lawmakers as to what priorities the association holds.

#11 Strategic Planning

The importance of a strategic plan is to commit the association’s objectives and action steps to writing. The plan should cover a period of time of one to five years. One aspect of creating such a plan is to consider the environment in which the association will be operating and identifying the factors which will affect it, such as competition, government regulation, anticipated crises, etc.

Normally the writing of a plan is done in a dedicated setting with the leadership and key volunteers. The use of an outside facilitator allows for impartial input and the introduction of insights. The job of the facilitator will be to advance the process and insure that the plan is completed in the allotted time.

The time to do the plan is probably in the last half of the first year, when enough experience with member input and association efforts can be evaluated and directions can be set for the second year of the organization.
DISCLOSURES...WARNING!

Not all associations are formed for innocent reasons! Let this serve as a disclaimer before you invest a great deal of time and money to form a new association only to look back and realize it was never intended to be an association in the truest sense of the word.

You’ll find people want to form an association for self-serving purposes. They are looking to “buy” a leadership role or they intend to design an organization for personal gain. Here are some examples and phrases to watch out for.

Can I be the “permanent president?” How will I be able to “own” the organization?

This individual probably tried to work within another organization and did not ascend to the leadership and thus wants to have his or her own association. Of course, a permanent president is inappropriate and is adverse to a member-driven organization.

Does it have to be non-profit?

Since 99% of associations are non-profit, you have to question the motives for forming a for-profit corporation and making it look like an association. Is their intent to use the name as a front for the marketing and sales of another company?

I want to be the executive director of the association, even though I know nothing about managing associations.

This statement shows the lack of knowledge and respect for the profession of association management. Few people understand the depth and breadth of skills necessary for managing the intricacies of a non-profit membership organization with revolving leadership and committees. In this example, it is incumbent for you to counsel the individual or group about the ongoing demands of association management.

We want to be sure to “keep out” certain competitors.

If you hear this statement, either you have some legal battles ahead or you should have left the table by now. Associations are formed to allow
individuals or groups to join; to be inclusive in accordance with the bylaws. Targeting who to keep out is adverse to the nature of associations. Let the bylaws define who can join and educate the board that keeping out members is not appropriate.

That “other association” doesn’t serve our needs!

Carefully consider the purpose of the proposed new association. If it fits within the mission of another association, then by all means guide them to the existing group. Try to convince them that the established group can be the vehicle for accomplishing their objectives and that it will be far easier to work within an association or chamber of commerce rather than trying to compete with them. In this case you might mediate a solution by getting the new group together with the existing association.

SUMMARY

Forming a new association can be an exciting and rewarding venture. When done systematically it can be accomplished with a team of volunteers. By adding professionals to the process, persons experienced in association management and start-ups, the process can be further expedited.
The most up-to-date content from one of the nation’s most respected association expert

**BOARD EXCELLENCE WORKBOOK**
- 130 pages of practical solutions for better board governance
- 10 Chapters on leadership development, orientation, strategic planning, committees, risks, administration, board meeting best practices, finances & more
- Spiral bound with 10 section tab dividers for easy reference

*Ideal for training and developing a leadership manual* $89  
+ $10 Shipping & Handling

**BOARD RESPONSIBILITIES GUIDE**
- Top 10 responsibilities of leaders; color, two sided
- Governance vs management, exempt-status, trends, legal duties, rules of order, terminology, insurance, risks, planning and more
- Laminated long-lasting reference for board members

*Thousands purchased by every kind of board* $12  
+ $3 Shipping & Handling  
*Just $9 if ordered in bulk*

**HOW TO BE THE ASSOC./CHAMBER CEO**
- 53 pages of success tips for association, chamber and non-profit staff
- Includes advice for travel, networking, member service excellence, teamwork and organizational effectiveness
- Tips you wish you’d told your staff or had known for yourself!

*Excellent for staff orientation and staff meetings* $29  
+ $6 Shipping & Handling

---

**Association Coaching Reserved Time**
For continuous improvement, organizations may request an ongoing coaching-consulting relationship. This ensures a relationship with Bob Harris, CAE, to respond to questions, provide answers, offer samples, monitor progress and to serve as a sounding board.

*5 Hour Blocks of time may be purchased for $900*

EMAIL bob@rchcae.com for more info on strategic planning, board seminars and staff training  
*See next page for additional tools and order form*
POLICY MANUAL FOR ASSOCIATIONS

- Guide to drafting your organization’s policy manual (with 25 most common policies)
- Samples on antitrust, computer usage, credit card use, record retention, apparent authority, consent agendas, confidentiality, conflicts of interest, auditors and more
- Clarifications of policies, procedures, practices and precedents

50 pages of tips and templates to get you started $39
+ $6 Shipping & Handling

ASSOCIATION SELF-AUDIT PROGRAM®

- 16 Chapters to identify organizational strengths and weaknesses
- Ideal for the Sarbanes Oxley management affirmation requirement
- Develops systems to streamline your organization!

Used by over 10,000 organizations to assess performance $39
+ $6 Shipping & Handling

RCH1-06

TIPS, TOOLS, & HOW TO GET AHEAD IN THE WORLD OF ASSOCIATIONS

Order $100 or more and receive the "Psychic Board Pen" for FREE.
You’ll predict your board’s next statement: "Let’s send it to committee!" "It’s not in the budget!" "We tried that once before!"

FAX THIS FORM TO 850.297.2800

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Shipping &amp; Handling</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board Excellence Workbook [$89]</td>
<td></td>
<td>+ $10 s/h</td>
<td>$</td>
</tr>
<tr>
<td>Board Responsibilities Guide - laminated [$12]</td>
<td></td>
<td>+ $3 s/h (1-2), $1 each (3+)</td>
<td>$</td>
</tr>
<tr>
<td>Antitrust Avoidance Guide - laminated [$12]</td>
<td></td>
<td>+ $3 s/h (1-2), $1 each (3+)</td>
<td>$</td>
</tr>
<tr>
<td>How to be the CEO [$29]</td>
<td></td>
<td>+ $6 s/h</td>
<td>$</td>
</tr>
<tr>
<td>Policy Manual for Associations [$39]</td>
<td></td>
<td>+ $6 s/h</td>
<td>$</td>
</tr>
<tr>
<td>Association Self-Audit Program [$39]</td>
<td></td>
<td>+ $6 s/h</td>
<td>$</td>
</tr>
<tr>
<td>President's Committee Planning - 30 pages [$24]</td>
<td></td>
<td>+ $6 s/h</td>
<td>$</td>
</tr>
<tr>
<td>Building an Association Mgmt Co. - 178 pages [$39]</td>
<td></td>
<td>+ $6 s/h</td>
<td>$</td>
</tr>
<tr>
<td>&quot;Psychic Board Pen&quot; - free with $100 order [$8]</td>
<td></td>
<td>+ $3 s/h</td>
<td>$</td>
</tr>
<tr>
<td>Association Coaching - 5 hour block of time [$900]</td>
<td></td>
<td>+ $0</td>
<td>$</td>
</tr>
</tbody>
</table>

☐ Bill Me ☐ Mailing Check (sorry, no credit cards)

Please mail payment with check payable to "HMG, Inc - NonprofitCenter.com" c/o Bob Harris, CAE 335 Beard Street • Tallahassee, FL 32303

Name
Organization
Street Address
City State Zip
Phone
Email EMAIL bob@rchcae.com for more info on strategic planning, board seminars and staff training