



ABSIA

Affiliate Guide

Edward Stygar, III, MBA, CAE
Executive Director
American Biological Safety Association

Governance

Governance is the participation of volunteers in making decisions that are crucial to the operation and viability of an organization. All members can't be involved in decisions so governance allows a board or council to make decisions on behalf of members.

ABSA Governance Structure

- *Members Elect Council*
- *Council is Responsible for Strategic Direction of ABSA and Accountable to ABSA Members*
- *Teams, Committees, and ABSA Staff Carry out policy and strategic plan*

Governance Documents

- Articles of Incorporation – *required!*
- Bylaws – *required!*
- Policies & Procedure
- Strategic Plan

Articles of Incorporation

- An agreement between the association and the state or government
- Statement of association's purpose
 - Statement of purpose has ramifications for tax-exempt status and antitrust liability
- Protection of association name
- Guidelines on formation

Bylaws

- Agreement between association and members
- Defines governance structure
- Only amended by the Membership
- Brief – ABSA Bylaws are less than four pages
- Meet the needs of the organization

Bylaws Include

- Statement of Purpose
- Types and Qualifications of Membership
- Dues Structure (not price!)
- Meeting Information – Members meeting, Council
- Role of Executive Director/CEO
- List and duties of elected officers
- Voting procedures and qualifications
- Standing Committees
- Designation of corporate seal

Policy & Procedures

Let your P&P grow with your organization, need to be flexible when your small.

Policy

- Spell out standard of conduct and decision making
- Articulate strategy of governing body

Procedure

- Spell out steps to administer Policy
- Address governance, management, operations, public image, and public policy

Policy & Procedures can be changed by the Council!

Policy & Procedure

Should include at least:

- Record retention plan
- Anti-trust program
- Procedures for meetings

Organized by:

- Governance: membership, structure, volunteer leadership (teams and committees), association management, finance
- Operations and Management – credentialing, finances, administration, meetings/conventions, dues, committee duties, publications, services
- Public Policy: media relations, crisis management

Strategic Planning and Management

Strategic planning periodically reviews member needs and the business environment to plan for the future.

Strategic management is a dynamic structure for the organization to think strategically in all decisions and to focus on the strategic plan.

Strategic Planning

- Assess strengths and weaknesses
- Identify present and future needs
- Provide products and services to meet those needs
- Continuous process
- Set priorities
- Achievable
- Based on research

Strategic Management

- Strategic Management empowers volunteers and staff to provide excellent products and services to meet member needs
- Council should focus on strategic direction and high-level policy of the organization
- Staff and Committees advise Council
- Staff and Committees are empowered to carry out the strategic direction and policy of the Council
- All continuously strive to meet member needs!

Budgeting and Finance

Budgeting

- Need an annual budget for organization
- Budget for conferences, meetings, products, and services so that you know how they perform and what price to set
- Be realistic: Overly optimistic revenue projections can be dangerous, be especially conservative in income estimates
- Council should be aware of and enforce the budget!

Budget Formulation

When budgeting:

- Consider all expenses
- Get input from Council, Committees, and staff
- Budget for contingencies
- Conservative estimates > consider recession or other events that affect the economy

Reserves

- Profit = Reserves for associations
- Reserves are needed for future member benefits and for unexpected events that affect revenues
- Rule of thumb is to have one year of expenses in your reserves
- Set goals > 20% Return on Investment (ROI)
- Nonprofit does not mean no profit!

Internal Controls

- Need checks and balances when managing the association's money
- Makes sure that the process of reviewing bills and writing checks is reviewed by more than one person

ABSA example

- Accountant writes checks
- Treasurer and Executive Director review all checks and expenses and sign off
- Treasurer signs most checks

Balance Sheet

Net Assets = Assets – Liabilities

Assets: Cash, investments, property, equipment

Liabilities: accounts payable, deferred revenue, prepaid, mortgage notes, debt

Investments

- Be conservative = low risk
- Research your investments
- Need cash on hand for expenses

Member Retention and Recruitment

Value!

To retain members or to recruit new members, membership must have **value**.

Typical Needs of Members

- Education
- Information
- Networking
- Involvement and Engagement
- Maintain Credentials

Benefits to Meet Needs

- Publications
- Courses/Presentations
- Meetings or Networking Events
- Volunteer Opportunities
- Information
- Advocacy

Determining Needs

- Ask members
- Surveys
- Interviews
- Open Communication
- Social Media

Start with Retention and Ensuring Member Value

- If you have satisfied members they become your best advocates
- Easier to sell membership or get new members if you have value
- Create a positive image or brand

Marketing Communication

- Present about biosafety and your association at related organizations meetings
- Network and Collaborate
- Submit articles to related organizations publications and to the media

Technologies for Marketing Communication

- Email List
- Facebook
- Twitter
- LinkedIn

Marketing Tips

- Start a marketing committee
- Develop a marketing plan
- Get your members involved, engaged, and excited!

Recruitment

- Communicate Value and Benefits
- Exhibit booth at complimentary meetings
- Advertisements
- Your Meetings and Conventions help recruit new members!

Retention

- Ensure that Value is sustainable and changes with member needs
- Communicate value and benefits to members
- Constantly monitor and meet member needs
- Provide great products and services!
- Get members involved

Conferences and Seminars

Conferences

- Conferences and Seminars give your members the opportunity to learn, network, see new products, and become involved in the organization
- Conferences and seminars carry a lot of weight in your members value proposition
- Conferences and Seminars are a large portion of most association's budgets

Considerations for a Successful Meeting

- Topics members need and want
- Appropriate Location
- Cost = Value
- Good Planning
- Committed Team
- Comfortable learning environment
- Networking opportunities

Topics

- Poll or get feedback from members to see what they want
- Hot topics or new developments that affect the members
- Use proven speakers
- Give members a chance to present
- Strive for new ideas (good balance that meets audience needs)

Location

- Location will depend on the size and geographic scope of the organization
- Location needs to be accessible and desirable
- Location needs to fit members budgets
- Sometimes the location will be dictated by the size of the organization >ABSA

Venue Options

- Office meeting room – small local groups
- University – small to medium group
- Restaurant- breakfast or dinner meeting
- Hotel – small to medium size group
- Conference Centers – large group

Use the venue option that best fits your needs!

Cost=Value

- Make sure the conference cost fits your members budgets
- Speaker and venue expenses are big factors in cost
- Make sure you budget for your conference and set a price that will cover costs and contribute to reserves
- Make sure your members are getting value for their money
- Getting and keeping vendors involved can help financially

Planning

- Start Early
- Four or five years for large conferences
- One year to six months for smaller meetings
- Involve everyone
- Staff

- Volunteers
- Vendors (Hotel, AV, Banquet, other contractors)
- **Be prepared for last minute requests and problem solving at the conference!**

Sample Planning Timeline (Annual Conference 800 attendees)

5-years	Choose conference location
2-years	Select Contractors and event venues
1-year	Call for papers, Start promoting
9-months	Contact corporate partners, Select Keynotes
4-months	Finalize program, increase promotion
3-months	Finalize Details
2-months	Get speaker materials
2-weeks	Double check details
Conference Time!	

Conference Team

- Staff
- Volunteer Leaders: Council, Conference Committee, etc.
- Speakers
- Moderators and Facilitators
- Contractors (hotel, audio visual, exhibit, conference services)

Many details that need to come together so it is important to communicate and work as a team!

Comfortable Environment

- Requirement
- An environment where members can learn
- Adequate space
- Safe
- Free of distractions
- Environment appropriate for delivery

Networking

- Need to have time to network: breaks, receptions, dinners, group sessions, etc.
- Share ideas and discuss issues
- Develop relationships for possible collaboration or partnerships
- Members value networking opportunities!

Meeting Tips

- Expect the unexpected
- Double check everything!
- Always have extra copies of meeting materials
- Have all contact information handy
- Details, details, and details

Resources

American Society of Association Executives

<http://www.asaecenter.org>

Association Forum

<https://www.associationforum.org>

Council of Engineering and Scientific Society Executives

<http://www.cesse.org>

Professional Convention Management Association

<http://www.pcma.org>

The International Center for Not-for-Profit Law

<http://www.icnl.org>

The Nonprofit Center: Promoting the Association Management Profession, Robert C. Harris, CAE

<http://www.rchcae.com>