

ARCHIVE OF CSAP DISCUSSION LIST BY TOPIC

BUSINESS OFFICE ISSUES

Topic: Association Management Software

Date Originated: March 21, 2005

Originator: Marla Staab, Kansas President

Original Message:

The Kansas Speech-Language-Hearing Association is exploring ways to improve the efficiency of our central office and asking if you know of any "association management" software that handles the many aspects of such an operation. Thanks.

Responses:

- a. Hello: I'm Tina Kautter, Executive Director of the Florida Association of Speech-Language Pathologists and Audiologists (FLASHA). My company is an association management company, so we provide the software to FLASHA and all our other clients. After looking around and not finding anything on the market that fit our high-volume multiple-client needs, we finally created our own system and hired an IT specialist who maintains our databases and does all programming. Our system is built on Access and from what I have seen, most off-the-shelf programs like this are also built on Access.

There are two good sources to find association management software: American Society of Association Executives (ASAE) www.asaenet.org and the IAAMC, whose website I don't have handy, but I'm sure you could find them with a search. Hope this is helpful! Tina Kautter

Topic: Insurance

Date Originated: September 30, 2005

Originator: Patty Banas, President Elect, Washington

Original Message:

I am trying to get information on what if any type of insurance your associations carry. Do you carry general liability or just insurance for special events such as a convention? This is something as a new officer I assumed our association had. Today I have found out otherwise. I would be happy to collate answers.

Responses:

- a. Florida (FLASHA) carries Directors' and Officers' insurance which provides general liability for the actions of the board and the members of the executive board. Robert C. Fifer, Ph.D.
- b. GSHA has general liability as well as Directors and Officers insurance. Jody B. Rosen, APR, Executive Director

- c. Arizona has general liability and Directors and Officers Insurance. Amy Heck, President
- d. Illinois: Trust or surety bonds are furnished for Secretary-Treasurer, President, and such other Executive Board members, volunteers, or employees of ISHA, at ISHA's expense.

Topic: CEU Co-Sponsorship

Date Originated: August 11, 2005

Originator: Vernice Jury, Connecticut

Original Message:

Hi - I am interested in learning how other state associations handle CEU co-sponsorship. We are in the process of reviewing our procedures. What fees, if any, does the state association charge? Is a contract used? Are association members offered reduced attendance fees etc.? Thank you.

Responses:

- a. In Louisiana, non-members pay a higher convention fee than members. Relative to CEU, processing of an individual's ASHA CEU paperwork is considered a benefit of membership. Non-members who desire ASHA CEUs are charged \$30.00. Organizations seeking LSHA's co-sponsorship of a CE event pay a fee of \$325.00. Theresa Rodgers, LSHA Past President
- b. In Florida, our rates are \$200 for 5 hours or less, \$350 for up to 10 hours and \$40 per hour over 10 hours. This is rather steep, but in Florida, our overhead has gone up considerably because we are required by law to report the CEUs of each attendee to a private firm's (CE Broker) data base for access by our license board. The steps required to do this are very labor intensive. Robert C. Fifer, Ph.D.
- c. In Washington we charge the organization \$225 for ASHA application plus a \$50 processing fee. No contract is used. Association members receive free ASHA CEU, and non-members pay a \$15.00 handling fee. Patty Banas

Topic: Performance Appraisals

Date Originated: June 26, 2006

Originator: Norma Hogan, Kentucky

Original Message:

Kentucky would like to poll the presidents to see who might have a Performance Appraisal form or their Executive Directors and staff if possible. Do you all use one there? We don't have anything formal and would like to start doing this yearly.

Responses:

- a. North Carolina does not use a Performance Appraisal.
- b. Texas does not have an appraisal form, but would appreciate feedback on this!
Lynda Barbee, M.S., CCC-SLP
- c. We don't have anything in South Dakota--formal or informal. We count ourselves lucky if we find candidates for all our positions-- if there were an appraisal attached, I'm not sure we could do even that.....Linda Ingerson, M.S., CCC-SLP
- d. Good Morning - Mississippi does not have one. Deirdre McGowan, Ph.D., CAE, MSHA Executive Director
- e. I don't believe that we use anything formal. Mary Friehe, Nebraska

Topic: Conferencing

Date Originated: October 10, 2006

Originator: Jeanne Juenger, MN President-Elect

Original Message:

Are any State Associations using phone/audio-/videoconferencing solutions to allow regional members of your organization greater opportunities to participate in committee work in real-time? If so, what services/products are you using?

Responses:

- a. Alabama no. Byron McCain, CAE, Executive Director
- b. In Colorado, we offer video conferencing to our Board members and committee members for our monthly Board meetings. Polly Somers, CSHA Administrative Assistant
- c. Kansas has used Intercall Global Conferencing Solutions. The service does not require a reservation and the fee is based upon usage. Contact sales rep Diane Jensen at 800-374-2441.
- d. In Maryland, we offer lots of options for committees to meet via conference calls, and we usually have at least one board meeting a year that is a conference call. If you are looking for an inexpensive conference call service, we use Judy Sabah at [303-777-1765](tel:303-777-1765) or judysabah@judysabah.com. The charge is \$20.00 per hour for a conference call line that will accommodate up to 20 people. People that are

- dialing in would have long-distance charges, but if they have an option for free or low cost long distance, it usually works out much better than the other services.
- e. We have talked about it in Nebraska, but not taken it to the next step. Mary Friehe, Ph.D., CCC-S, Chair
 - f. In Texas our EB uses phone conferencing often and our task force chairs also utilize this service with their committees as needed. Lynda Barbee, President
 - g. In Missouri, we have one of the four annual EB meetings held via teleconference. Melissa S. Passe M.A., CCC-SLP
 - h. Could you share what the cost is and what company you use for your conferencing? Mary Garrison, M.S., CCC-SLP, President, Minnesota Speech-Language-Hearing Association
 - i. In Oklahoma, we use video conferencing for our Executive meetings. We have two sites - that people must go to participate. It has really helped our participation. Mona Ryan
 - j. In Wyoming, we often need to meet by teleconference just because of where members are throughout the state. We use our web site to announce meetings and agenda items but typically have not given the phone conference information out to all WSHA members -- gets way too expensive that way. Lynda D. Coyle, M.S., CCC-SLP

Topic: Management Firm

Date Originated: November 6, 2006

Originator: Christy Strole, Illinois

Original Message:

Our Executive Director's job description is pretty vague. Does anyone have a good one they could share? Thanks and see you next week!

Responses:

- a. We don't have an Executive Director in Colorado, just a paid AA. I've attached her job description for you in case it's useful (on file at the CSAP Office by request). Kathy Boada, Past-President, Colorado Speech-Language Hearing Association
- b. Attached please find the one we used in our recent search for a new management company - may be more than you want! (on file at the CSAP Office by request). Lynda Barbee, Texas

Topic: Management Firm

Date Originated: December 11, 2006

Originator: Mona Ryan, Oklahoma Speech-Language-Hearing Association President 2006

Original Message:

We are faced with a sudden crisis situation. We have recently gone through a Strategic Planning process and one outcome was looking in to expanding our “Central Office” and possibly contracting a Management Firm. Our secretary has been hired to do minimal tasks (but essential) and we wanted to expand it. In our executive meeting, our member’s company who hires (and uses) the secretary was at the meeting Saturday, Dec. 9. I just received a letter of resignation effective Dec. 31, 2006. We are needed quick information on everything about management firms – where to find them, advantages, disadvantages, etc. Please forward any information you might have in this area. As you can tell from the e-mail – we don’t have much time to find a replacement.

Responses:

- a. You should go to the web site of the AMC Institute (formerly the International Association of Association Management Companies) at iaamc.org. Everything you need to know is housed there as well as lists of member AMCs. Cynthia Keillor, Executive Director, Illinois Speech-Language-Hearing Association (account executive at Bostrom Corporation)
- b. The Mississippi affiliate has retained a management firm since 2001, which has the capacity to service additional clients. For additional information please contact Deirdre McGowan, Ph.D, CAE at 601 214 1649
- c. As you are no doubt well aware CSAP is managed by a professional management firm-Craven and Associates-which also, I think, manages several of the state associations. I believe there are others out there as well. It seems to me that there are options, but I think that you would want to take some time before quickly making a decision, entering into a contract that would last for a time. Personally I would want to interview several groups and make an informed decision. I am wondering if you couldn't buy some time to do this by enlisting the help (paid) of a retiree or two, who might be delighted to put in some time with the association. Just a thought. Lizbeth Stevens, Ph.D., CCC-SLP
- d. Mona, I think you should contact Craven Management Associates for a bid. They do an excellent job for CSAP and several state associations use them as well. There are many advantages to using a management firm not the least of which it lessens the burden on state association volunteers. Good luck. Lisa O'Connor, Past, Past President CSAP.
- e. I own and operate an association management firm in Alabama. I suggest you contact the local association of association managers in the state and get a referral. I bet they are located in your capital city. Our group is called the Alabama Council of Assn. Executives. The American Society of Association Executives in Washington DC, might be able to provide a referral. www.ASAE.org. I could service your group for finance, convention

registration and CE but would be too far away to manage local issues that need hands on assistance. Byron, President Innovative Assn Services, Inc., Speech and Hearing Association of Alabama

- f. Hey Mona, Missouri went through this situation a few years ago when I was an Executive Board member. We asked everyone we knew to tell us about the management firms they knew. We asked for bids of interested companies. Robert Craven, the management firm that currently represents CSAP, Penn., and now Missouri, was asked if they were interested in putting in a bid to represent Missouri. They were and put in a successful bid. We felt extremely comfortable with them, since they had represented Penn. for several years, and we had also worked with them on CSAP. I would start by doing the same thing. Ask everyone to give you names of management firms and immediately ask them for a bid. If OK can afford them, I would certainly recommend Robert Craven Management –they have experience and all of their staff have been wonderful to work with. You could also contact Tracy Grammar past Oklahoma Pres. She worked with them as well. Good Luck! Karlen Brucker
- g. I can highly recommend PSHA's management firm-Craven Management Associates. Craven Management Associates, LLC, 800 Perry Hwy, Suite 3, Pittsburgh, PA 15229, Phone: (412) 366-1177, Fax: (412) 366-8804. Linda Hu, President of Pennsylvania

Topic: Management Firm

Date Originated: December 23, 2008

Originator: Sharon Clagett, President, WVSHA

Original Message:

West Virginia Speech-Language-Hearing Association is seeking referrals for management companies. We want to have multiple bids and chose a firm which will fit our needs and what we hope to afford.

WVSHA would like to know the following information about your management firm:

Name and contact information of the firm you would recommend.

What are the 5 best services you receive from your management firm?

Size of your state association membership?

Any suggestions for WVSHA as we seek a firm.

Thank you for your valuable input and suggestions.

Responses:

- a. This information would be helpful to others who do not currently use a management company. Any chance the results of West Virginia's survey could be shared with others? Mary Peterson, President, Michigan Speech Language Hearing Association.
- b. Robert Craven, LLC. (They are the company that manages CSAP)
What are the 5 best services you receive from your management firm?

1. Organization (of records and association data) and familiarity with speech and hearing associations;
 2. Conference planning help and help during the conference;
 3. Able to give advice on most topics/issues that come up, very experienced and knowledgeable;
 4. Edit and manage web site
- Excellent management of membership dues, applications, etc
Size of your state association membership? around 600 members
Any suggestions for WVSHA as we seek a firm. Go with Craven or chose a company that has experience with managing associations
Tina Eid, President-Elect, Virginia
- c. Name and contact information of the firm you would recommend. CVENT – we are currently considering using them.
What are the 5 best services you receive from your management firm?
1. On line registration for events
 2. On line payment for events and member renewal
 3. Easy set up
 4. Low cost
- Size of your state association membership? 300
Any suggestions for WVSHA as we seek a firm. Be sure you know what your needs are first. Jennifer Pierce, Montana