

Administration Finance

e-communicqué

Autumn 2004

From the Chair

By Helen Druce

Since no words of great enlightenment seem to have developed to share with each of you, my message is simply to say how much I admire the individual and collective talents that belong to you as members of the NABE Administration and Finance Section. It is both a delight and a challenge to bear the title of Section chair for 2004-2005!

Time to plan for the Salt Lake City arrival in February is upon us –



*Brigham
Young says
you'll love
Salt Lake
City in
February!*

including early arrival for the A&F Section-sponsored program beginning on Monday evening, the 7th. I recall attending at least two special conferences developed by this Section, and on each occasion felt that the early arrival was MOST worthwhile. I feel sure that this year will be at least parallel.

I surely value the interaction with those NABE members and speakers who are in the forefront of collecting and implementing information of all kinds – budget & finance, human resources, administration, and technology. Hearing about the latest trends gives me the awareness, practical applications, and much more.

A recent fall weekend in the Adirondacks provided a contrast to the world our offices must operate

in today. During our second annual stay with close friends in a lovely corner of the world, especially golden in the fall sunshine, I was struck by the contrast of activity with no television, no phone in the room, no cell tower to allow use of our cell phones, but time to piece puzzles, play board games, paddle a canoe, take a stroll, and even knit while we chatted, laughed, and ate too much! That tranquility is not the reality of our day-to-day activities with a bar association, no matter what job title we hold!

Please join with other Section members and guests as this 2004-2005 year moves forward, explore the extra wealth of information that will be presented on February 7 and 8, and take home information to assist you to more effectively and efficiently serve your association. Also please plan to attend the A&F Section meeting held during NABE.

Best wishes to all for the work that you do and the holiday season ahead. May you find at least some truly tranquil moments!

Respectfully,
Helen

Section Leadership 2004-2005

Helen Druce, *Chair*
Allen Kimbrough, *Vice-Chair*
Greg Derwart, *Secretary*
Trudy Levindofske, *Treasurer*

Council Members

Janice Jerman (2006)
Yvonne McGhee (2006)
Colleen McManus (2005)
Dana Collier Smith (2005)
Madonna Vandeventer (2005)
Fred Parker, *Immediate Past Chair*

Preventing Workplace Violence

Workplace violence is an occupational safety and health hazard that demands action. Whether the risk of violence comes from a co-worker, client, patient or the public, employees deserve a safe workplace. Employers must be provided with tools to develop comprehensive plans to reduce levels of risk. State programs are developing formal rules as well as voluntary guidelines to help employers prevent this type of workplace hazard.

Oregon has taken a strong information and training approach to create awareness and encourage action. By creating several publications and working directly with the Associated Oregon Industries and other groups, statewide education network training forums have addressed this emerging area. **Cal/OSHA** held conferences on workplace security in a drive to increase awareness of the issue, promote additional research, and develop guidelines requested by safety and health professionals for preventing workplace violence. If present,

indicators of violence in the workplace require further evaluation. Although workplace violence is part of a larger societal problem, the employer is still required under the California Labor Code to provide a safe and healthful place of employment. Employers at risk of robbery or other violent assaults must address workplace security in their injury and illness prevention program.

Indiana has issued general duty clause citations on workplace violence. **New Mexico** settled a Section 11(c) discrimination case involving workplace violence. Two employees with a history of fighting were involved in a fight at work. One complained and was subsequently transferred 60 miles away to another duty station. The employer did not reprimand the employee who was the aggressor in all the altercations.

Minnesota established the Workplace



Violence Prevention Team in 1993 to research workplace violence and recommend a course of action for MNOSHA. Members include staff from MNOSHA Compliance and Workplace Safety Consultation. An essential member of the team is the Violence Prevention Coordinator, a full-time state-funded position. MNOSHA Compliance answers questions about workplace violence and responds to complaints about workplace violence. One of several onsite investigations conducted in 1998 resulted in a citation under the general duty standard. The team developed an informational fact sheet, posted on MNOSHA's website at www.doli.state.mn.us/vvp_fact.pdf.

Minnesota's Workplace Violence Prevention Center, established in 1997, continues to grow and provides information to the public. The Minnesota Violence Prevention Program forms cross-disciplinary partnerships with other violence prevention programs to create a statewide initiative. Through a successful partnership with the Harvard School of Public Health Prevention Institute and

ZING!

Workplace Violence

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Education Development Center, Minnesota took part in a nationwide satellite training session on youth violence prevention, with over 2000 participants. In 1998, MNOSHA trained over 1500 employers and employees in 36 violence prevention training sessions at ten regional centers.

Washington developed safety and health standards for the late night retail industry in 1990, and uses enforcement and consultation resources to encourage hazard abatement and prevention. The Workplace Violence Awareness and Prevention workshop helps participants assess risk factors and develop preventive measures. A written guidebook covering these topics and a sample prevention program were developed by WISHA, along with over 30 representatives of labor, business and the academic community (www.wa.gov/lni/pa/workvil.htm). WISHA's video *Is It Worth Your Life?* with real-life scenarios demonstrates what workers and employers can do to prevent injuries. The video is distributed to employer networks and associations and may be reproduced.

In 1997, the Washington State Department of Labor and Industries' Safety and Health

Assessment and Research for Prevention (SHARP) program completed a comprehensive study of workplace violence based on federal and state data for 1992-95 ([www.wa.gov/lni/sharp/39-2-](http://www.wa.gov/lni/sharp/39-2-97.pdf)

[97.pdf](http://www.wa.gov/lni/sharp/39-2-97.pdf)). Homicide was the fourth leading cause of workplace deaths in Washington state, and most incidents were consistent with well-known risk factors. Most were committed by persons

unknown to the victims and most of the victims worked in retail trade, security services or transit. The majority of non-fatal injuries also occurred in predictable settings, but in contrast to the fatal assaults, most of these injuries occurred in a setting where the victim and attacker were in a custodial or client-caregiver relationship, such as health care or social services. Especially notable is that while the trend for assaults against private sector workers in the state was downward, that for state government workers was rising. This study counters the notion that violence on the job is a random event, and consequently impervious to remedy. Prevention

strategies, such as hazard assessment and de-escalation training, are available to address the risk factors in each work setting.

From the U.S. Department of Labor, Occupational Safety & Health Administration website. For more information visit www.osha.gov.



*Can't we
all just
get along?*

Buy, Lease, or Upgrade? Setting an IT Budget

By Ephraim Feig

When budgeting for information technology, look for a methodology and guidelines rather than specific recommendations. Start by answering these questions:

- Which technologies do you need?
- Which technologies should you buy off-the-shelf, and which should you have custom built?
- When should you upgrade?
- Which technologies should you own, and which should you lease?

IT is constantly changing. So if you plan to stay up to date, either you need a sophisticated IT department or you must consider various outsourcing options.

At a minimum, plan for efficiently scaling upward, in terms of capacity and functionality. Leverage economies of scale by deploying off-the-shelf components whenever possible, and then customize around these. Also leverage your existing IT investments, but don't get bogged down with distractions.

Here are the primary issues you need to focus on:

Integration. In computing the cost of technology, base costs are often only a small percentage of lifetime costs. For example, you may buy from numerous vendors, but require various levels of integration among the products. You can often save on integration costs if

you buy from one vendor, but you may not have the bells and whistles that could make you more efficient in the long run. So find bundles of solutions from a few vendors, and choose those companies that make it easy to integrate their solutions to others. If you buy technology rather than lease it, budget for installation and maintenance costs.

Security. Keep in mind that much of your valuable information will be exposed to the outside world via the Internet, for example when you ask members to register online. Most association Web sites offer personalized content based on data that the hosting organization has about the visitor, and this data must be accessed to generate that content. To offer this level of service, you must build a secure infrastructure. Web site hosting and

security is not a simple matter, and it is expensive. That's why most organizations don't host their sites. Similarly, as Web sites become more database driven, you'll need to weigh the costs of maintaining and securing your data management systems versus having them serviced professionally.

Needs. Decide what functions, not technologies, you need and what processes you run. This, of course, depends on the services your association offers. There are some common functions that almost all associations need:

- personal productivity (word processing, e-mail, presentations);
- accounting;
- membership management;
- event calendars;
- event registrations;
- membership applications; and
- meeting management.

Accreditation and certification management processes are unique to each association. Look for workflow applications that mimic your processes rather than forcing

them to conform to a rigid, canned structure. Other functions you should consider incorporating include e-mail marketing and Web content management.

Customized off-the-shelf solutions.

As a rule of thumb, buy applications that are ready to run out



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Setting an IT Budget

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of the box. Depending on the size and complexity of your organization, you should be able to find off-the-shelf solutions that handle many of your necessary functions at levels suitable to your needs. Choose complete solutions that allow relatively simple enhancements via customization for those specialized functions that are most critical to you. If you are buying or leasing a new system, ensure that it can easily integrate custom and third-party Web-based applications. One of the next big waves in IT is application integration over the Internet. *Web services* and *XML* are the buzzwords, and the major software providers are building infrastructures in support of such integration. This is not a fad. Ignoring this trend will translate to painful IT expansions in the coming decade.

Upgrades. If you have an association management system (AMS) and are happy with it, consider postponing a full replacement until your vendor releases a new major version. Then you can decide whether to upgrade or switch; the former option is typically easier to deploy, but not necessarily your best bet. Meanwhile, explore how you can extend your existing system with the added functions you want, whether they are custom built or integrated via third-party applications. All modern management systems allow for some integration.

If you are adding on to an existing system, consider software-

as-a-service (leased solutions) if shrink-wrap software requires significant hardware additions. In two or three years you may upgrade your AMS, and you don't want to be limited by a complex hardware infrastructure. You want flexibility and the ability to leverage economies of scale as far as basic components are concerned (i.e., computers, routers, firewalls, surge protectors, tape backups).

Buy versus lease. Most associations are not used to leasing software; at least, they don't think so. Consider this: Many associations lease Web-hosting software as a service, and they are probably leasing some online payment processing software as a service as well. And, of course, they are leasing a lot of telephone software as a service, paying for it in their monthly cellular phone bill. But yet associations tend to shy away from leasing enterprise-class software for such functions as relationship management, accounting, and marketing. Overcome your fear of leasing advanced software applications. The major software vendors offer several delivery and support options under the software-as-a-service model:

- In early 2002, IBM began offering hosted solutions to smaller businesses. The company's intention "is to offer a hosted service to large customers who may want to try it out first, or those who don't view operating a data center as their primary business competence."

- Oracle offers Oracle On Demand "so you can focus on innovation, rather than routine maintenance."
- Microsoft offers a suite of tools and services to get third-party service providers to build with their software.

More and more, you'll see sophisticated hosted applications integrated with other applications. Companies that build applications specifically designed for various verticals, including associations, are also adopting this model. When considering a new system, study this option, and look at companies with a proven track record and stable financials.

Productivity. Modernize your staff-facing technology immediately. If you're running 350 MHz Pentium PCs with Windows 95, invest \$500 in a 2.4 GHz PC with a lot more memory and disk space, a modern version of Windows with some preloaded applications, and built-in support for high-bandwidth Internet connectivity. The gains in personal productivity will outweigh the cost, and your return on investment will break even sooner than you think.

Remember, you want technology to accelerate your work-related performance, not hinder it. Modern IT, when used properly, can help you achieve this goal.

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Physically Fit Employees Have Better Work Performance

Modifiable, lifestyle-related health risks significantly impact on-the-job performance, according to a study conducted by the HealthPartners Research Foundation. The study, published in the *Journal of Occupational and Environmental Medicine*, shows that respondents who engage in moderate exercise have higher work-quality and better job performance than those who lead sedentary lifestyles.

According to the study, physically fit employees get along better with co-workers and take fewer sick days than out-of-shape

employees. Subjects with high levels of cardiovascular fitness perform more work, using less effort.

Led by Nicolaas P. Pronk of HealthPartners, the researchers analyzed health and lifestyle factors in 683 workers in various occupations completing a health risk assessment.

Levels of physical activity, estimated physical fitness and obesity were then compared with indicators of job performance, as rated by the workers themselves. The workers' physical activity and physical fitness had a significant impact on their work performance. More physically active workers reported higher work quality and better overall job performance. As physical fitness increased, so did the quantity of work performed. In addition, more fit workers needed to expend less extra effort to do their work.

Obesity had a significant but negative impact on work. Twenty-two percent of workers in the study were classified as obese, and 4.5 percent as severely obese. Obese employees reported more

difficulty getting along with coworkers, while severely obese workers missed significantly more days of work.

Physical inactivity and obesity have well-known negative effects on health and health care costs. Ill health obviously leads to increased health costs because of absences from work. However, relatively little is known about how these risk factors affect indirect costs, including costs related to decreased productivity on the job.

"Lifestyle-related modifiable health risk factors significantly impact employee work performance," Pronk and coauthors conclude. Workers who are at least moderately fit and more physically active have higher work quality and better overall job performance. In contrast, obesity may affect relationships in the workplace, while severe obesity leads to excess absences from work.

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