

A Administration
F Finance

e-communiqué

Winter 2005

Special Edition

Salt Palace Preview

Salt Lake City, Utah
February 7–8, 2005



**SALT PALACE
WORKSHOP**

From the Chair

By Helen Druce

We're in the count down to the great Salt Palace Workshop sponsored by the NABE Administration & Finance Section! Each of our days, as it unfolds, holds some situation or a question arises that most likely will be covered at the Workshop on February 7 & 8 (that is my hope and belief!) whether it be about employment laws, accounting changes, investment policies, software options and selection, staff hiring, etc. The question is how can I attend all of the sessions?

The added benefit is, if the planned program doesn't include it, the opportunity to interact with

continued on page 2

From the Chair

Continued from page 1

colleagues facing the same or similar situations is part of the benefit of registering.

Our Section and all NABE members owe a great round of applause to the workshop planning committee, chaired by Greg Derwart, with staff support from Jill Werner. Those hardworking Section members planning for us include: Craig Combs, Charlie Lorenzetti, Colleen McManus, Janis Jerman, Julie Armstrong, Allen Kimbrough, and Fred Parker. Thanks to all!!

After the workshop concludes and NABE programming commences, please join us at the NABE Administration & Finance Section meeting on Thursday, February 10, from 8 - 9 a.m. for the

Section breakfast meeting (Room 150G, Lower Level).

It's a sunny winter day in Syracuse, NY--contrary to all those reports that say the sun never shines here--though cold, 12 degrees this morning. We are over scheduled with meetings and activities as you all are--can't wait to see each one of you in Salt Lake City to spend time with you all, the terrific people who understand what it takes to keep bar associations



going, share the same concerns, and are so much fun to be with!

Happy & safe travels,
Helen

Section Leadership 2004-2005

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

Council Members
 Janis Jerman (2006)
 Yvonne McGhee (2006)
 Colleen McManus (2005)
 Dana Collier Smith (2005)
 Madonna Vandeventer (2005)

Fred Parker, *Immediate Past Chair*

Salt Palace Workshop Exhibitors

Please make sure to visit with the following organizations during our Workshop, whose generous support has helped to provide us with an affordable program.

- Authorotative.net
- Intus Technologies
- Lexis Nexus
- Lois Law
- Marsh Affinity Services

I Need Your Help!

On Tuesday, February 8th, I will be presenting a fabulous program at the NABE A&F Section Salt Palace Workshop. Here is the program information:

Pushing the Envelope - Employee Relations Strategies for When Your Employees Push Back! Handling employee relations issues can sometimes be like walking in a minefield, particularly for those who are not full-time Human Resources practitioners. Do you know how to address your employees' issues and concerns? Would you like an opportunity to discuss specific employee situations and get feedback on how they should ideally be handled? You won't want to miss this session!

To make this a fabulous program, I need your questions and personnel scenarios. Please e-mail me

(jjerman@ctbar.org) with questions and/or personnel situations that you would like help with. Want to know exactly what to say to that great performer who has a terrible personal habit that bothers the entire office? How about what to do with your star performer who is habitually late and causing morale problems with the on-time performers?

I am sure that you have your own particular sticky issue. If you wish for your sticky issue to remain anonymous, you can email your question/scenario to Jill Werner (WernerJ@staff.abanet.org) at NABE. She will compile a list with no identifying information and send it to me. No one will be identified as the owner of any particular question or sticky situation at the program (haven't we all been in all of those situations ourselves?!).

Colleen McManus, Director of Human Resources at the State Bar of Arizona, will join me in

responding to your questions and scenarios. We might even invite attendees to role play some of the scenarios. If we do not get through all of the questions and scenarios in the time allotted for the program, we will answer the questions in an article in an upcoming A&F section newsletter.

Here is your assignment:

1. Register for the A&F conference immediately so that you do not miss out on this and the other great programs. For more information, go to: http://www.abanet.org/nabe/sec_admin_education.html
2. E-mail your questions and scenarios as soon as possible.

Thanks for your help! We are looking forward to this fun, informative and interactive program.

Janis C. Jerman
Connecticut Bar Association
860-612-2007
jjerman@ctbar.org

Salt Palace Workshop Registration

Monday's registration for workshop attendees will be from 3:30 to 5 p.m. in the foyer outside Room 250 D/E/F on the upper level of the Salt Palace Convention Center. Your folders with your badges and handout material will be available. Registration materials for the NABE Midyear Meeting will be available on Tuesday at the joint registration desk in the North Foyer, lower level of the Convention Center.



DBS Corner

As you work away in the Salt Mine that is your Bar Association, are you wearing any of these hard hats?



Finance



Human Resources



Office Administration



Strategic Planning

If so, come up for air at the A&F Section's Salt Palace Workshop!

Salt Lake City, Utah
February 7-8, 2005



**SALT PALACE
& WORKSHOP**

**tuesday,
february 8,
2005**

EXHIBITOR CONTINENTAL BREAKFAST | 7:30 a.m. to 8:15 a.m.

PLENARY SESSION | 8:15 a.m. to 9:30 a.m.

Preparing Your Bar Association for the Future

If you fail to plan, you plan to fail.

Keep your bar association relevant to members by preparing for the future. Do you have the right people, funding and resources? What should you be looking for and where should you be trying to go? We promise practical tips you can take back home to create your own future.

PRESENTERS:

Stuart Forsyth

Executive Director
Los Angeles County Bar Association

Matt Silverman

Director of Communications
State Bar of Arizona

FIFTEEN-MINUTE EXHIBITOR TRANSFER BREAK

FIRST CONCURRENT SESSIONS | 9:45 a.m. to 11:00 a.m.

[SESSION 1] BUDGET & FINANCE

Changes in the World of Accounting and Auditing

What is the Impact on Non-Profits?

The world has changed in the corporate world with new regulations, new standards and more scrutiny of boards. In this seminar, the audit partner for the Utah State Bar will discuss how these far-reaching changes impact us in the Non-Profit arena, including board responsibilities for audits, new best practices in governance, and new accounting standards that may affect our organizations.

PRESENTER:

Mark W. Stevens

Audit Director
Deloitte & Touche LLP, Salt Lake City, UT

[SESSION 1] ADMINISTRATION

From discussions to reality

Learn how the plans are moving along for the Bar Alliance association management software consortium, being designed to meet your needs.

PRESENTER:

Toby Brown

Director of Communications
Utah State Bar

[SESSION 1] HUMAN RESOURCES

The Ins and Outs (and Ups and Downs!) of Employment Laws

Do you know the top 10 reasons that employers get sued? This session will provide information on recent developments in employment law and practical tips to help you avoid getting caught off guard. You won't want to miss this opportunity to learn how you can manage your association within the law in this interactive program.

PRESENTER:

Lois Baar

Partner
Janove Baar Associates, L.C.

FIFTEEN-MINUTE EXHIBITOR TRANSFER BREAK

SECOND CONCURRENT SESSIONS | 11:15 a.m. to 12:30 p.m.

[SESSION 2] **BUDGET & FINANCE**

Empowering your Investment Policy

Many bars have significant amounts of funds available for investing beyond their current fiscal year. This seminar will explore how to develop an investment policy to achieve your objectives. How to determine your asset allocation, define your goals and objectives, learn how to measure your success in managing your bar's assets. Many consultants use a three-step process of investment policy writing, investment manager selection, and ongoing quarterly reporting reviews to ensure prudent management of your available reserves.

PRESENTER:

Mike R. Bostler

Senior Consultant

Alpha Investment Group, LLC

Milwaukee, WI

[SESSION 2] **ADMINISTRATION**

Profiles in Courage:

The Successful Selection and Implementation of Software in Your Association

We have all experienced the momentous task of selecting and implementing association management and accounting software packages. Bar personnel will share ideas (and warnings) to help your bar association do more than just survive the process.

MODERATOR:

Janis C. Jerman

Director of Administration & Finance and Bar Counsel

Connecticut Bar Association

SPEAKERS:

TBA

[SESSION 2] **HUMAN RESOURCES**

So Now You're a Recruiter?

Successful Strategies for Interviewing, Hiring and Evaluating Your Employees

Hiring and retaining the right people has become more challenging than ever before. Working in non-profits, we sometimes find it even more difficult to compete for talent in the marketplace. This session will offer practical tips you can use right away to help your organization be a success in identifying, selecting and evaluating your employees.

PRESENTER:

Colleen McManus, SPHR

Director of Human Resources

State Bar of Arizona

EXHIBITOR LUNCHEON | 12:30 p.m to 1:45 p.m.

FIFTEEN-MINUTE TRANSFER BREAK

THIRD CONCURRENT SESSION | 2:00 p.m. to 3:15 p.m.

[SESSION 3] BUDGET & FINANCE

True confessions of an IRS Representative (planned)

One of the most popular seminar experiences in recent years is the opportunity to interact, question, and discuss "real" issues related to UBIT, for-profit subsidiaries, foundations, and more with a representative from the IRS. We are currently working with the Internal Revenue Service to have a representative from their local office who is knowledgeable on the topics that affect not-for-profit organizations. *(Please no questions on how many wives, a Mormon can claim on his 1040).*

INVITED PRESENTER:

Local IRS Representative

[SESSION 3] ADMINISTRATION

The Bold and the Beautiful:

Facilities Management Professionals from the Cleanest, Safest Bars Tell All!

Conditions in bar association offices affect staff and multitudes of visitors. The obligations to staff and to visitors may differ. Facilities management professionals will discuss various topics, including legal requirements, tips for providing a productive work environment, asset management, and other facilities management issues.

SPEAKERS:

Jeffery L. Campbell, Ph. D.

Chair of the Facilities Management program
Brigham Young University
Provo, UT
Other speakers TBA

[SESSION 3] HUMAN RESOURCES

Pushing the Envelope

Employee Relations Strategies for When Your Employees Push Back!

Handling employee relations issues can sometimes be like walking in a minefield, particularly for those who are not full-time Human Resources practitioners. Do you know how to address your employees' issues and concerns? Would you like an opportunity to discuss specific employee situations and get feedback on how they should ideally be handled? You won't want to miss this session!

PRESENTERS:

Janis C. Jerman

Director of Administration & Finance and Bar Counsel
Connecticut Bar Association

Colleen McManus, SPHR

Director of Human Resources
State Bar of Arizona

FIFTEEN-MINUTE EXHIBITOR TRANSFER BREAK

BULL & BEER SESSION | 3:30 p.m. to 4:30 p.m.

TABLES WILL BE MARKED BY DISCUSSION TOPIC TO FACILITATE INTERACTION AMONG ATTENDEES