CSAE Where you belong.

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The Reward is in the **Eye of the Beholder**

ROBERT WILSON, THE UNCOMFORT ZONE

In the early 1970s I was a young teenager who was completely caught up in the Zeitgeist. I admired the long-haired rebels and radicals who were engaged in protesting the establishment and developing the counter-culture. I didn't really know what any of that meant, but to me it was all about empowering youth and declaring our independence from the adults. My parents in particular.

As with any normal teenager, I was trying to grow up as fast as I could. And, because it annoyed my parents, wearing my hair long was its perfect expression. That, and it was de rigueur among all the teenagers who wanted to be cool. So, the longer the better – or in the immortal words from the title song to the 1968 Broadway Musical HAIR, "Oh, say can you see, My eyes if you can... Then my hair's too short!"

It drove my parents completely crazy. They could not understand why any male would want to wear long hair. We fought about it all the time.

Meanwhile, I was in my first year of high school and the transition to a new school was causing my grades to drop dramatically. My parents saw an advantage, and the law was laid down: keep my grades above a certain minimum or cut my hair. It worked. I brought home a dismal report card, and it was off to the barber shop. Not surprisingly, my next report card met the minimum.

The formula is simple: if you can find out what is valuable to someone, then you have the key to motivating them. For me, at age 13, the length of my hair became the coin of the realm.

A year later, I accidentally made the Honor Roll. I say it was an accident because I was only trying to meet the minimum grades required by my parents and I somehow exceeded that. When I received the engraved certificate with the embossed gold seal, I was surprised by the feeling it gave me. I felt important – especially when my teachers praised me. I liked that feeling, and I wanted to experience it again. Suddenly the coin of the realm changed, and it was no longer the length of my hair that was motivating me. It was high grades and the sense of pride they gave me. Oh, my hair continued to grow, but my grades were all about achievement. From that point forward until I graduated, I never failed to make the Honor Roll.

Find out what is valuable to the person you want to motivate. What hobbies do they have? What are they passionate about? How do they spend their spare time? Then when you learn what rocks their world, find a way to tie your goals to it.

If you're not sure what is valuable to someone, you can always make them feel important with an award or some other public acknowledgment. Everyone likes to hear their name announced in recognition at company or association meetings. Everyone likes to read their name in print in the organizational newsletter or website. Many business newspapers have a section where you can post your employees promotions and accomplishments. These low-cost to no-cost incentives truly have the power to motivate.

Robert Evans Wilson, Jr. is a motivational speaker and humorist. He works with companies that want to be more competitive and with people who want to think like innovators. For more information on Robert's programs please visit www.jumpstartyourmeeting.com.

CSAE Source

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Choice Architecture?

Nudge Describes How to Improve Decision Making

ROBERT RADER, CAE

I read *Nudge* because I had heard that those in the White House were reading the book. It has become well-known in many circles because of its premise, that, when people are provided with good choices, positive results can be had. I wanted to see if this suggestion, which would appear to be mostly common sense, could play a significant role in education matters in which CABE members work.

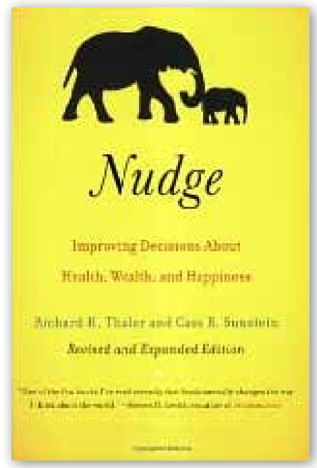
Okay, I understand that you might not understand what "choice architecture" is. But, it is at the core of many of the decisions that we make in life and in education.

Two heavyweight thinkers, Richard H. Thaler, a professor of Behavioral Science and Economics and director of the Center for Decision Research at the University of Chicago's School of Business and Cass R. Sunstein, the Felix Frankfurter Professor of Law at Harvard Law School, have teamed up to write a book about, well, yes, how choice architecture affects the decisions we make and how we can improve decisions in many areas of our lives.

"Choice architecture" refers to how we frame the choices we have when faced with making decisions. For example, when students eat at a school cafeteria, you hope that they will choose the healthiest foods available. The management of the cafeteria has a number of ways to arrange the food, everything from randomly, to ways designed to maximize the profit of the cafeteria to encouraging the purchase of the healthiest foods. The power of the "choice architect" is in determining how best to put out the food.

One would hope that the food is arranged in a way to encourage students to buy the healthiest available. This would not include putting the desserts up front or putting French fries at eye level. Carrot sticks might be the better choice to encourage.

In looking at just these types of questions, researchers found that they were "able to increase or decrease the consumption of many food items by as much as 25 percent. The lesson: "school children, like adults [in say, supermarkets], can be greatly influenced by small changes in the context. The influence can be exercised for better or worse." In this example, a good result would be students eating healthier.



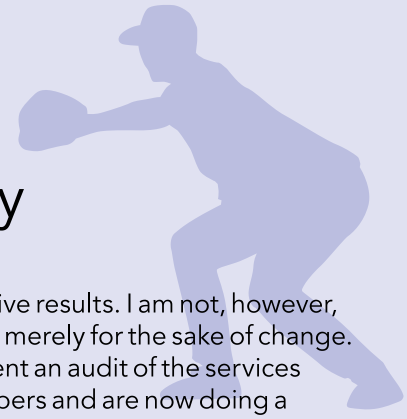
That, in a nutshell, is what *Nudge* is all about. With many examples from everyday life, the two authors describe how choices are presented and their contexts will help determine the decisions that are made.

Thaler and Sunstein believe that to "nudge," that is, to "alert, remind, or mildly warn another" is a way of exercising what they call "libertarian paternalism." In this they argue that they are encouraging the use of nudges in how we make our choices for the good of the person making the choice or even of society as a whole.

Probably the best example of using nudges has to do with new employees. Those who are told of their opportunity to invest in a retirement account are much less likely to enroll and invest than those who are automatically enrolled upon employment. This is "libertarian paternalism"—the employee need not actually use his money to invest, but by being enrolled, he or she is much more likely to do so.

Continued on page 4

FROM THE PRESIDENT



How Yogi Berra Can Help Your Association: Not For Baseball Fans Only

LISA STEIMER, CAE, PRESIDENT

I am a Red Sox fan who comes from a long line of (gasp!) Yankee fans. My father often shakes his head in utter amazement that one of his offspring could actually be a Sox fan.

Yogi Berra is one of the greatest baseball legends to have played the game. A fifteen time All-Star who played in 14 World Series, Berra was a catcher for the New York Yankees during the 1940s and 50s. Yogi is also known for his rather unique and confusing quotes. You may have seen him in the Aflac commercial driving the Aflac duck crazy with "Yogi-isms" in a barbershop.

So, why am I, the Red Sox fan, writing about one of the Yankee greats?

First, I really do think Yogi is great. He simply is.

Second, it seems appropriate to do so since we are in the midst baseball season. As I put the final touches on this column the Sox and Yankees are preparing to face each other for the next two evenings.

Third, and most importantly, there are some things that Yogi can teach us or at least remind us of about association and non-profit management and leadership.

A nickel ain't worth a dime anymore.
Ain't that the truth, Yogi! The economy is tough and it looks like it is going to take its time in improving. We need to look creatively at our resources and must do everything we can to stretch our nickels into dimes. Is your organization part of a buying consortium? Have you done an energy audit?

I never said most of the things I said.
Be careful what you say. You may say the right thing, but it may be taken out of context. Make sure you know what you are talking about and that your answers are well thought out and concise. Nothing is worse than being interviewed by a reporter only to have your comments taken out of context to create a "sensational" sound bite.

It's like déjà vu all over again.
It is easy for us to keep doing things as we always have – same old, same old. We don't have to! Times have changed dramatically in just the last 18 months. We should, at the very least, be examining how we do things to see if they can be done in ways that are more efficient and deliver more effective results. I am not, however, recommending change merely for the sake of change. CABE recently underwent an audit of the services we provide to our members and are now doing a communications audit. Both efforts and the work we are doing as a result will enable us to better meet our members' needs and to communicate our services and value more effectively to our members and prospective members.

You can observe a lot just by watching.
We need to listen to our members' needs. Ask a question and listen. Don't be afraid of a little silence. Let the other person tell you what they are thinking. Don't assume you know what they are thinking.

You've got to be careful if you don't know where you are going because you might not get there.
The summer months are upon us. For many of us this is a time of year that is a bit more relaxed than the rest of the year. Use this time wisely. Rest up. Create attainable goals with an action plan. Without a concrete plan that includes goals, you will not move forward. You will simply tread water.

When you come to a fork in the road, take it.
Do your homework and know your options and the possible consequences of these options. Then make an informed decision to take the fork in the road.

The game isn't over until it's over.
Don't give up! There are nine innings in a game and things can change quickly. Our business is always in motion and most likely tomorrow will bring something different your way.

Finally, a quote about Yogi Berra from one of his managers, Casey Stengel: Why has our pitching been so great? Our catcher that's why. He looks cumbersome but he's quick as a cat. More so than ever, we need to have the ability to be catlike - agile and quick. This ability is what will keep many of our organizations viable and enable us to be stronger in the end.

I hope each of you has the opportunity to spend some relaxing time away from the office this summer. While it is nearly impossible to unplug in today's world, take a moment to take in a game and remember the wisdom of Yogi!

Continued from page 2

Part of the authors' idea is that while people try to make their best choices, sometimes they don't realize what is in their best interests. They also sometimes make decisions based on biases and tendencies that might not be the best way to choose.

By using the best choice architecture, especially when faced with lots of options, people are "nudged" into making the best decisions. If you've been asked to pick mutual funds from the lists of hundreds made available to you in a 401(k) plan, you can easily get lost in the decision making. The new groups of funds that are targeted to say, retirement in 2020, is a form of nudging that may help ease the confusion.

So, how do these theories work at a real association and how can they help you? We use the idea of libertarian paternalism at CABE. Board chairs are considered part of our Board Chair listserv, unless they opt out. Some who start off skeptical may find that once they start getting these e-mails, they will find them useful. If they had to opt in, they might never get the chance to know.

While *Nudge* is not the most exciting book I ever read, it provides some good ideas about how we can shape our society to encourage good behavior. It provides a strategy that could help with some of the Legislature's desire to make changes in many areas. Rather than implementing mandates, one idea in the book concerns identifying and measuring issues, which, when addressed, can lead to better results.

Think about how you can help their members by steering them in the right direction when faced with multiple, good choices. When you survey members, ask them questions or develop your legislative positions, consider how to do things in a way that will work for them, the organization and society.

Encouragement without mandates. That's a good recipe for success anywhere.

Robert Rader, CAE, Executive Director, Connecticut Association of Boards of Education.

PCI Compliance

What it Means to Your Association

AMY AIRHART, PCI MANAGER

PCI.... What does it mean? Is it important or just another acronym?

Accepting credit cards is a great way to offer a flexible payment option for your members and improve your cash flow; consequently, this means handling sensitive information that is very desirable to criminals. In an effort to keep fraud and identity theft at bay, the major credit card brands established a PCI Security Standards Council in 2006 with the purpose of developing uniform regulations for all businesses that process, store or transmit credit card data. By following the Payment Card Industry Data Security Standards (PCI-DSS) guidelines, you greatly reduce your association's vulnerability to a security breach. Not only does this send a powerful message to members that the association can be trusted to handle credit card data with care, but it also communicates to the Board of Directors that the association has done due diligence in protecting sensitive member information.

How do you store paper copies of credit card data? How do you process credit cards? These are practical security issues addressed by the PCI-DSS and apply to all merchants, regardless of credit card processing volume. Failure to meet requirements can result in security breaches, costly fines, and on-site audits. Many acquiring banks have already mandated level 4 merchants (those who process fewer than 20,000 e-commerce Visa transactions per year) to validate their compliance and are charging upward of $250 per month for non-compliance fees. Please check with your acquiring bank for specific deadlines and fees.

Even though the PCI-DSS is not a federal law, several states have mandated compliance to many of the provisions. Minnesota became one of the first states to adopt a set of enforceable standards which protect credit card data. Since then, Nevada, Washington and Massachusetts have also adopted similar laws. Connecticut could be next.

Implementing small changes can have a big impact on your credit card information security. While there are guidelines in the PCI-DSS that address internet security and payment applications, there are also guidelines for how organizations handle credit card data on a physical level (www.pcisecuritystandards.org). Assessing your association's vulnerabilities is a great way to fix potential issues and educate the staff. According to some reports, the majority of credit card fraud is caused by simple carelessness, loss, and theft www.datalossdb.org/statistics. Office security policies that define procedures for changing passwords, storing or transporting information and disposing of credit card data can make the difference between compliance and non-compliance.
There are several steps a merchant must complete to become PCI Compliant:

- Identify Validation Type (this is based on how credit card transactions are processed)
- Complete the SAQ (Self Assessment Questionnaire)
- Complete and provide evidence of a vulnerability scan, if necessary, from an approved vender on a quarterly basis.
- Complete the Attestation of Compliance
- Submit the SAQ/ Attestation of Compliance and evidence of a passing scan (if required) to acquirer.

The steps to becoming PCI Compliant may seem a bit overwhelming; however, your members and organization will directly benefit from the increased security. For information regarding PCI Compliance or to learn how Affiniscape Merchant Solutions can help you through this process, please visit www.pcicentral.com or contact Amy Airhart at 866-376-0947.

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Organize Your **Association for Legislative Success**

ELIZABETH GARA, PRESIDENT, GARA & MARKOWSKI, LLC

New laws and regulations are changing the way we do business every day. As a trade association, strong legislative and regulatory advocacy must be one of your top goals. Here are 7 tips on how to successfully organize your association to win passage or defeat of laws affecting your industry.

1. Create a Legislative Committee

Trade associations are faced with dozens of laws affecting their members. You need an effective Legislative Committee dedicated to outlining the association's legislative positions and implementing successful legislative strategies. The committee must meet regularly and be representative of the membership as a whole. Committee members must also be available to meet with lawmakers and public officials and testify at public hearings on key issues.

2. Develop a Government Affairs Agenda

Each fall, the Legislative Committee should develop a Government Affairs Agenda that outlines the association's recommendations on key legislative & regulatory goals, including long-range and short-term goals. All members should be given the opportunity to provide input on the recommendations at meetings, using on-line survey tools or via e-mail. A well-thought out agenda that outlines reasonable, consistent positions each year is critical to building credibility with policymakers and keeping members focused on advocacy efforts.

3. Clearly Outline the Board's Role

Your Board of Directors should be charged with giving final approval to the Government Affairs Agenda and in overseeing the association's advocacy efforts. There should be a strong link between the Board and the Legislative Committee to ensure that the association's advocacy efforts further the mission of the association. Board members should receive regular, timely updates from the Legislative Committee or lobbyist on pending legislation.

4. Identify a Process for Resolving Conflicts

Associations should try to achieve a consensus position on legislation that reflects the interests of all members, but this is not always possible. You should therefore outline a process for resolving conflicts on legislative positions. Many associations require positions to be adopted by a simple majority vote of the Board or Legislative Committee. You should also allow members to generate a minority position and submit it to the board for its consideration. When members feel that their views are fully considered, they are more likely to continue their involvement with the association even if there is a disagreement.

5. Designate Legislative Point People

Bill language and status can change abruptly during the legislative session and your association must be positioned to respond quickly or be shut out of the process. Even if you have a lobbyist, you should identify members who will act as point people for the association's legislative activities. Your point people must have the expertise to review bills and amendments and determine whether they should be supported or opposed. They must also be accessible during the legislative session, including evening hours.

6. Maintain Effective Lines of Communication

Miscommunication can seriously undermine your advocacy efforts, particularly if bills or legislative deadlines are missed and the association's interests aren't represented. Make sure your lobbyist and legislative point people have a firm understanding of all of the issues affecting your members. Require your Legislative Chairs or lobbyist to attend board meetings and provide immediate updates to the board and legislative committee. Make sure your board members check their e-mails and voice mails regularly and respond to requests for input immediately. Also, use an on-line bill tracking system that allows members to access information on pending legislation.

7. Hiring a Lobbyist

Hiring a professional lobbying firm can be very cost-effective and will ensure that your position is communicated successfully to key policymakers. As a trade association, you want to ensure that your lobbying firm is positioned to provide you with a certain level of services. For example, ask them whether they can draft the association's testimony and legislation, research issues and help you develop a grassroots network and media relations plan. Also, ask them how many other clients the firm represents and whether there are conflicts of interest or time constraints that will interfere with representing your association.

For more information on organizing your association for success, please contact Elizabeth Gara, Gara & Markowski, LLC at 860-841-7350, gara@gmlobbying.com. Gara & Markowski, LLC is a lobbying firm that represents a wide variety of trade associations.

A WELL-THOUGHT OUT AGENDA THAT OUTLINES REASONABLE, CONSISTENT POSITIONS EACH YEAR IS CRITICAL TO BUILDING CREDIBILITY WITH POLICYMAKERS AND KEEPING MEMBERS FOCUSED ON ADVOCACY EFFORTS.

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MEMBER-TO-MEMBER

How do you engage your employees?

"Employee motivation is a hot topic for all leaders. Motivation is highly personal and largely internal. What matters to one person may mean nothing to another. Motivating employees or volunteers is really a pairing of passions and priorities. I ask my staff and my volunteers what their passions and priorities are. It is important to ask them what do they want as a result and I try to energize and align employees around your association's vision and key strategic priorities, while harnessing their passions."
Alison Harle, CTRS, Executive Director, CT Recreation & Parks Association

"Build employee morale: Fridays off in the summer, avenues to share their thoughts and take a leadership role, opportunities to try new ideas, floating holidays for ones they work, extra personal time, but most of all allowing them to experience a role, a project or pitch in ideas when they normally wouldn't have the chance in another organization."
Karen Maciorowski, COO, CT Association of Nonprofits

"I found that getting employees on the same page was easier when I gave them a common goal. For example, contests worked often. In some cases we'd invent individual contests for individual contributors. In other cases creating teams to compete against each other worked. For example with multiple offices, we'd compete between the offices and the measurement would be whatever goal top management was trying to achieve. It wasn't always about revenue or cost cutting, improved customer service or better looking facility decoration worked or best marketing campaign idea worked too. If we ran out of specific goals from the top down we'd bring the department heads together, who would bring ideas from their people and we'd build a list from the bottom up. Of course not every contest was popular, some didn't get off the ground to well at all, but as long as some of them were fun, we got movement in the general desired direction and that made everything else in the business better."
Russell Lowry CFP® CRPC®, Lincoln Life

Please answer this question for the next issue of CSAE Source: What is the toughest challenge your association faces in light of this difficult economy? Post your response at www.csae.net