



**FSAE Foundation Think Tank
Boca Raton Resort & Club, Boca Raton, September 7-8, 2006**

“The In’s, the Up’s and the Out’s of HR for Association Management”

The dynamics facing the workforce today are beginning to cast the shadow of change that will unfold in the halls of the Association Management profession over the next five to ten years. Regardless of the employee pool, both large and small associations are faced with a need for strategic innovation around hiring, retention, and retirement practices brought on by the shift in life situations for each generation working in today’s labor market.

With the largest population of workforce on the verge of retirement, and the ability for younger generations to choose from among a wide-variety of benefit-rich employers, the conditions are set for associations to be positioned at the lower end of the employee-employer bargaining table.

The main challenge associations will face is in evolving away from the traditional approaches of securing and developing high-quality talent, while keeping the rich knowledge of experience protected and accessible at a reasonable cost. All associations will be looking to one common labor pool while being challenged to structure, fund, and promote the benefits of a gainful employment career within the association industry. The starting line is marked, and all associations are lined up with their bags packed. The needs of association employees and employers can be both traditional and contemporary as each thinks about how to partner best in meeting financial, developmental, and life balance along the way. The resources that will be needed to compete and finish this race are still unknown to many.

It is for that reason that this year’s FSAE Foundation Think Tank took a journey of inquisition and discovery to help gain the insight, knowledge, and direction on what action to take as each walks the employer path asking questions such as:

1. What will it take in the near future to promote association career life as an attractive possibility in such a way that high quality talent enters into the career paths of associations?
2. How will the people resources within associations be developed, supported and promoted for next step positions and gaps that are opening in the near future?
3. What positions will associations need to take with regard to retirement planning of association employees and leadership?

Our facilitator was Kathy Potts, owner of Change Reaction Consulting, and Director of Organization Development & Learning for the Home Shopping Network.

Surveying the Landscape of Issues Related to HR & Association Management: The Pre-Session Survey

The field of play was defined as focusing on Attraction, Retention, and Retirement. Through a process of pre-session data collection, questions and specific association needs were determined and the outline of discussion was created. As an introduction and kick-off, the participants received a report of the survey questions and responses, as a means to direct attention to the “state of affairs” with regard to themselves and the topics at hand. There were 13 respondents to the survey and 20 attendees at the Think Tank. Below are the results of the pre-survey responses shared with the group:

<p>What is the single most important challenge facing your association within the next five years?</p> <ul style="list-style-type: none"> • Membership development (54%) <ul style="list-style-type: none"> – Creating value for members/staff – Creating dedicated workforce • Financing (31%) <ul style="list-style-type: none"> – Revenue income – Long-term care – Utilizing technology • Misc. (15%)
<p>FOCUS ON ATTRACTION</p>
<p>Favorite Interview Questions</p> <ul style="list-style-type: none"> • Current Perception of Self (39%) <ul style="list-style-type: none"> – Talents, weaknesses, habits • Future Focused/Situational (31%) <ul style="list-style-type: none"> – Describe how you would... • Reference to Last Job (23%) <ul style="list-style-type: none"> – Reasons for leaving last position – How last employer would describe you? • Misc. (7%) <ul style="list-style-type: none"> – What do you know about us?
<p>Do you have a drug testing requirement for new employees?</p> <ul style="list-style-type: none"> • Yes (23%) • No (77%)
<p>Do you hire outsiders for applicant background checks? Rely on reference checks? Both?</p> <ul style="list-style-type: none"> • Reference Checks Inside Only (62%) • Both (23%) *1 uses for only top jobs • Reference Checks External Only (7%) • No checks conducted (7%)
<p>Does your association have a plan for attracting A+ talent within the next 5-7 years?</p> <ul style="list-style-type: none"> • Yes (23%) • No (77%)
<p>Where do you find talent? (31%)</p> <ul style="list-style-type: none"> - The best source? - In administrative arena? - In the Florida labor pool? - Skilled, knowledgeable, flexible? <p>Misc. (23%)</p> <ul style="list-style-type: none"> - Should we be “testing” for skills/ability/traits? - What incentives are others using?

FOCUS ON RETENTION	
Are you currently experiencing challenges with retaining the talent in your organization?	<ul style="list-style-type: none"> • Yes (23%) • No (77%)
Does your association currently have a retention strategy in place?	<ul style="list-style-type: none"> • Yes (38%) • No (62%)
If so, is this strategy effective?	<ul style="list-style-type: none"> • Yes (38%) • No (15%)
Is your association currently using a career & succession process?	<ul style="list-style-type: none"> • Yes (23%) • No (69%)
If so, is this process effective?	<ul style="list-style-type: none"> • Yes (3:4 respondents) • No (1:4 respondents)
Do you anticipate a large number of staff retiring from your association within the next 5-7 years?	<ul style="list-style-type: none"> • Yes (31%) • No (62%)
How can we make our associations “attractive” to today’s labor market? (15%)	<ul style="list-style-type: none"> - Competing with position overpay - Turnover to other associations
How do we appeal to the less tenured workforce (15%)?	<ul style="list-style-type: none"> - Realistically appealing to the “ladder climbers” - Keys to retaining Generation X
Questions Respondents Wanted to Cover	<ul style="list-style-type: none"> • How much should we invest in staff career development? • How far out should we be planning? • What are the pro’s & con’s of promoting from within?
FOCUS ON RETIREMENT	
Does your association provide any financial retirement benefits to association staff members?	<ul style="list-style-type: none"> • Yes (4:13 respondents) • No (5:13 respondents)
Does your association offer a 401k plan?	<ul style="list-style-type: none"> • Yes (54%) • No (38%)
What is the condition of your association’s retirement plan with regards to reserves?	<ul style="list-style-type: none"> • Excellent (38%) • Good (15%) • Misc. (23%)
Will you choose a lump sum retirement of annuity?	<ul style="list-style-type: none"> • 23% - Lump • 23% - Annuity • 7% - Varied Approach • 23% - Neither • 15% - Unsure
How much does your retiree’s health coverage cost current retiree & spouse per month?	<ul style="list-style-type: none"> • 69% - Nothing • 23% - Set/Varied Amounts
What do you view as an optimum retirement age?	<ul style="list-style-type: none"> • 31% - 65 years of age • 7% - 66-68 years of age • 15% - 70 years of age • 7% - No age • 15% - Varies based on Health/Ability

FOCUS ON RETIREMENT CONT.

Does your association provide assistance resources for those seeking support with the psychological aspect of retiring?

- *Yes (0%)*
- *No (100%)*

Questions Participants Wanted to Cover

- How do we utilize the growing workforce of qualified workers – who themselves, are not ready for retirement?
- What are the pro’s & con’s of keeping retirees on as contractors for advice/consulting?
- Should you do it, why or why not?
- How far in advance should one start planning?
- How do we address employee concerns about “life after retirement?”
- When is appropriate time to discuss with the Board?
- How do you exit “gracefully” and “let go”?

In addition to the pre-event survey, a mini-survey was conducting during the first half hour of the event, in which participants were asked to share:

1. Their most burning questions with regard to Attraction
2. Their most burning questions with regard to Retention & Development
3. Their most burning questions with regard to Retirement

The Agenda & Design of the Think Tank

To support having the most current and valid information available, subject matter experts were called upon to present cutting edge research related to being an employer in a multi-generational workforce, employee attraction strategies, employee retention and development strategies, and financial considerations for retirement planning as employers.

In order to maximize the amount of discussion, all presenters were given a 30 minute window to present the best of their information. As a resource, all participants were provided with a binder of the presenter information, which can also be found on the www.fsae.org.

What was the Make-Up of the 2006 FSAE Foundation Think Tank Attendees?

The group took a poll at the very beginning of day one to better understand the make-up and size of association employers and the size of each association’s workforce. The following chart is the outcome of the poll:

Participants representing associations with under 5 full-time employees	10
Participants representing associations with 6-20 full-time employees	4
Participants representing associations with over 20 full-time employees	6

From this initial question, it was determined to be of value to structure discussions of small “like” groups, cross-functional small groups, and large group report out and processing. This also allowed for maximum participation for several voices, rather than having to manage 20+ voices on he floor for 2 solid days.

The In's of HR for Association Management

Presentation 1: Forecasting the Winds of Workforce Shifts

In order to provide a better picture of the current and future workforce from a statistical point of view, subject matter expert, **Craig Bromberg with Development Dimensions International, Inc.** presented a compelling case for why leaders need to be paying attention to four Generations filling the workforce today. Those generations include the Veterans born between 1922-1943, Baby Boomers born between 1943-1960, Gen X born between 1960-1980, and Gen Y born between 1980-1994.

Some facts presented to the group included:

- 50% of population at retirement age – 5 years
- By 2010 – 31% drop in 35-45 year olds
- 80% of new businesses started since 2000 owned by Gen-X-ers
- “Interesting work” is top priority for – 62.5% under 30
- 65% of teenagers said they’d rather have a career that gives them time for family and fun than a career with more money
- Late Xers most likely to leave current jobs
- Older workers are happier with their jobs.
- Younger leaders struggle most with *older* employees

With the facts being presented, the leadership challenges being implied included:

- Retaining talent in order to grow business
- Developing the new generation of leaders
- Transferring institutional knowledge into the hands of the next generations
- Creating an environment to foster innovation tied to competitive growth results
- Accommodating multiple views and styles to build loyal customers and employees
- Understanding that these issues faced all nations impacted by the events of WWI and WWII.
- The fact that it will soon be a “buyer’s market” for jobseekers

What did you glean from the workforce study?

Upon hearing the differences among the generations, along with the thoughts, preferences and needs of each entering, developing and leaving the workforce, the participants were asked to share their thoughts. The conclusions the group was left to ponder included:

- We need to understand there are a lot of employees thinking of leaving
- The future will require a whole new style of management
- The face of new businesses will be held by Gen-Xers (entrepreneurs)
- Experience doesn't count for much with the Gen Xers
- People are living longer and this is impacting the make-up of household living
- Mid-level to Upper level management positions will need to be developed and replaced
- The younger generations are naturally skilled at anything requiring instant knowledge
- The younger generations enter the workforce with a feeling of entitlement
- Getting people to serve on boards to cater to older boards may be difficult
- We will have to offer "not old way" opportunities
- Will we be able to depend on them without micromanaging?
- Clear guidelines have to be given
- Who is going to pick your successor will depend on make up of the board
- Picking the board may prove to be a factor of success/failure
- We will need to look at job descriptions
- The "decision-makers/authority figures" of today will need to learn to take advantage of the talent, energy, and passion of all the generations, appreciating their difference with a keen eye for how to use their differences
- More focus on retention
- Retention of members easier to retain old vs. get new
- May need to rethink definition of "virtual" job –actual space
- Work at home programs for Gen-X/Y and folks taking care of parents
- Not all Gen-X/Y lump into category destinations – not all the same

To summarize the conversation, the group generally agreed that they would have to think differently about the organization when it came to work time; space; motivators of the different generations; strategies for appealing to each; and the styles of management tolerated and expected by each.

During the flow of conversation, the ideas turned more towards how to find an accurate fit for open positions. At this point, several different ideas were contributed to the conversation.

- When it comes to evaluating the hiring decision, some have found using DISC Evaluations useful when getting down to the final 2-3 candidates. The question will become whether or not to create the position first and then to match the person, or to find the person first and then create the position based on talents that person brings to the table.
- For some of us, there was an internal audit conducted first, then the employees were moved based on the fit
- We held an off site retreat to show different styles
- We calibrate for fit (coming from a representative from larger association)
- Cross train if smaller association; larger okay to calibrate

Presentation 2: The 3 D's of Attracting Association Management

The second presenter of the day was ***Joan Brannick, Ph.D., SPHR and Owner of Brannick Human Resource Connections.***

“Insanity is doing the same thing over and over again and expecting a different result.”
- Albert Einstein

This was a quote that resonated with the participants during the Think Tank, as Joan spoke to “traditional methods” of what most organizations do. There was even truth in the laughter the group shared, as she gently called an attention to the typical recruitment tactics such as running the same ad more frequently or in different places expecting a high response rate. She also spoke of how lowering expectations/ standards, and simply complaining without taking action can be the “rut” that many of employers can find themselves in.

The main point reached was that there will be no single “one size fits all” – the answers to tomorrow’s dilemmas will require thought, situational research, and planning on behalf of the employer. To be truly effective, Joan provided the room with the idea that attracting talent must be a process that involves:

1. Knowing what you are looking for and
2. Using what you are looking for, to determine and drive the process

The three components to “knowing what you are looking for” included understanding the culture of your association in terms of the purpose it serves and how it is organized to carry that purpose out. Once this is identified, then creating the ideal employee profile of the attributes and abilities an employee would need to possess in order to fulfill the promises of that function. Last, but certainly not least, creating a behavior-based interviewing process that explores the candidate’s values, skills, and abilities.

To keep the group on task, Joan kept her presentation down in timing, and provided each person with a free copy of her book, *Finding and Keeping Great Employees*, available at www.brannickhr.com. As with all the presenters, her presentation can be found on the [FSAE website](#).

What are you doing to Attract Talent?

Think Tank Forum Discussion #1

As noted earlier, the association leaders in attendance were asked to share their “most burning questions” at the beginning of the day, so as to target their needs real time, in addition to the pre-survey complete via email.

The approach to answering the questions was addressed by having the leaders break out into two groups: the 10 individuals who made up the associations with 5 or fewer employees and the remaining 10 that made up those individuals representing associations with 6 or more employees.

The following questions were posted at the front of the room for both groups to answer and report out on:

1. What successes have you had with attracting A+ Talent? What did you do, how did you do it?
2. What success have you had in appealing to the younger generations –literally, what has worked?
3. How have you utilized technology for attracting talent?
4. How have you used assessments? What are the upsides? Downsides?
5. How have you determined the salary structure within your association?

Question #1

What successes have you experienced with attracting A+ Talent? What did you do, how did you do it?

Under 5 Group

1. Local university grad placement programs
2. Look to who you know
3. FSAE job central
4. Employment agency (local) – temps first as trial
5. Outsourcing
6. Look to volunteers
7. Poaching with permission

More than 5 Group

1. Steal talent from members
2. Employee referrals
3. When new exec. is rebuilding – opportunities occur
4. Prof. Networks
5. Redesigned/Rethought the position
6. Don't use newspaper, beyond entry
7. Hire former CEOs
8. Outside consultant
9. Use temp Agency
10. Intern program
11. Few hired cold

Question #2*What success have you had in appealing to the younger generations –literally, what has worked?***Under 5 Group****More than 5 Group**

1. Title (with prestige)
2. Let them be themselves (flexibility) – summer hours – 2 pm Friday Out!
3. Reward initiative
4. Interns used/trained/then give away/sorority house family/FSU
5. Work around school schedule
6. Pay health club; b-day dinner, lunches
7. Health insurance for full family
8. Variety that comes with smaller association
9. Can break the rules in small association

1. Referrals from your children and other young people (volunteer orgs)
2. Pay for education
3. Try the unexpected – host a boat ride to convene members

Question #3*How have you utilized technology for attracting talent?***Under 5 Group****More than 5 Group**

1. Placed ad in online version of paper
2. make sure **we** have best technology and software in your office (interview)
3. CEO update, ASAE post to attract web savvy and put info on website
4. (link) online application only – see skills
5. My Space and ipodcasts (Monster.com out of favor)
6. Technology shopping sprees for employees and organization
7. Replace computer every two years
8. Laptops only – wireless
9. PDF profile of organization and members
10. Job posting site on web

1. Monster, Internet, specialized networks
2. Post on own career center

Question #4*How have you used assessments? What are the upsides? Downsides?****Under 5 Group***

1. Not really
2. Pay enough to enable them to be homeowners, stable life
3. Use pay grades so not out of line

More than 5 Group

1. DISC, Caliper, Profile – all used
2. Test voluntary – applicant can voice disagreement
3. Role playing/scenario planning “in basket” process
4. Some use no assessment

Question #5*How have you determined the salary structure within your association?****Under 5 Group***

1. Conduct local benchmark
2. Utilize salary survey then added money
3. Pay more than average then bump after three months
4. Salary increased while budgeting and bonuses too - ASK THE BOARD
5. Ask for bottom line from applicants
6. Bonus on the spot (in budget) – performance bonus holidays bonus
7. Breakdown of compensation – health care taxes
8. Gift certificates \$50/\$100/ Publix card/Wal-Mart
9. Other incentives: tickets to theme parks/ballgames
10. Travel, professional development education/pay spouse to go
11. Provide “flex time”
12. Vacation + Yikes!
13. 401K/SEP

More than 5 Group

1. Research comparisons, then upgrade
2. CEO needs ability to defend structure
3. ASAE, salary.com, blue chip, FSAE
4. Share structure with other associations
5. Few use – 20% raise from previous position
6. Use current rates as indicator
7. Salary
8. Reassess ranges annually
9. Local networks, invaluable
10. Consultant to do “desk Audit”

The Up's of HR for Association Management

Presentation #3: Building Competitive Advantage with Contemporary Retention Strategies

*“If you do not know where you are going, then any road will get you there.”
- Lewis Carroll*

With all the talk of needing to read the signs ahead, the next presenter was by far the mark of yielding to reflect on the retention strategies built on the foundations of personal trust and respect. **Kenneth M. Baylor, VP of Republic Services, International**, from Ft. Lauderdale, Florida, shared the need of today's leaders to realize the power of influence on the workforce through the stories of motivating our country's waste management operators – also known as the guys who pick up our garbage.

Ken focused the group's attention on ego and dignity using a filter of practical application and common sense. As the group attested to in the session, the marketing campaign leaders drive to attract and retain an engaged workforce takes place in the way they treat others during daily interaction. The keys to retention we were reminded of were strong, yet for many, forgotten secrets. In fact, some may seem so forgotten that they have surfaced with as contemporary retention strategies. Within the niche of association employment, it is most likely true that the leader's war stories of horror or humility are announced on the employees' grapevine hotline.

To steer the focus towards what leaders can do differently Ken challenged the group to consider incorporating strategies such as:

1. Building the reputation that energizes and attracts lasting talent
2. Surrounding yourself with the best, even if it means hiring people smarter than yourself
3. Improving your ability to read passion in others, and hire those with an insatiable thirst for fulfilling that passion
4. Recognizing what people pride themselves on and contribute to this on a frequent basis
5. Finding the time to say “thank you”

Ken's presentation was build upon an article he wrote for the upcoming 2007 Pfiffer's HR Almanac. His presentation can be found on the www.fsae.org.

What does your retention strategy look like?

Think Tank Forum Discussion #2

Creative Activity

To end day one, each person received a sheet of paper and colored markers to create a drawing of their association's retention strategy using pictures and/or words. The activity got the energy flowing and small groups of three shared the representations of their sheets. When the group was asked to report, here were the comments offered for insight to the larger whole:

What are the keys to RETENTION?

- Honing one's soft skills
- Saying "thank you"
- Not necessarily a "written" strategy
- Having an insurance policy, 401K, sick leave, value
- Professional development – tuition, books
- Friendly people do well overall
- Establishing a pool of donated time that can be given away for incentive
- Pulling together the team for a two-day retreat
- Conducting an Employee Engagement survey
- Providing a suggestion box and creating process for letting employees know what the responses are
- Employee's just want to know what's going on – create a feedback loop to keep them informed
- Teach to the individual's strengths not their weaknesses
- Realize there is such a thing as a Culture fit – and not everyone is a fit with every culture – and that is okay
- After a board planning session, it would be a good idea to have a staff planning session to review the 12 month calendar and to look at stakeholders to involve them
- Create a discipline and/or process of recapping board meeting out to staff
- Employee reviews – these are best served as a two-way dialogue NOT a one-sided lecture
- To help employees both own and see their own strengths and weaknesses, have them complete a self-evaluation before the review
- Assign senior email to communicate misunderstandings that occurred – misc. communication
- Nationwide survey – 98% rewarded with PTO afterward

The Up's of HR for Association Management

Presentation #4: Advancing the Talent of Your Association

Our facilitator took on a new role at center stage as she kicked-off day two with her presentation on career and succession management strategies.

Kathy Potts, owner of Change Reaction Consulting and Director of Organization Development & Learning for HSN, posed this question to the group, “Who is responsible for developing the value-add of employees within your associations?” The answer to this question was explored through the eyes of the organization’s role in hiring, training, developing, tracking, measuring, and rewarding employee contributions. On the other side of the coin, the employee’s role was discussed as having a clear understanding of the personality traits and thinking abilities so that they can request to be placed into positions of becoming responsible association champions.

The presentation was delivered in more of a conversational format, allowing participants to interact with and even challenge the presentation. In particular, the group learned about what situations adults must be placed in for them to be in a position of positive value add.

- To develop your employees, you must help them build a thinking pattern that allows them to repeat decision making processes to the point of competence.
- For employees to learn from life experience, they have to be given the opportunity to create their stories – and associations have the ability to afford them a learning process that involves taking risks and making mistakes
- When looking at how to best utilize the older members of your workforce, remembering their life experience with problem solving combined with their need for a mental challenge could mean a revived look at re-incorporating them into the career pipeline as mentors and coaches to the next generation.

As with the other presenters, this presentation is also available on the www.fsae.org.

The Out's of HR for Association Management

Presentation #5: Life Planning: Features and Benefits for You and Your Employees

By far the most pressing questions the attendees of the 2007 FSAE Foundation Think Tank asked were about exiting strategies and philosophies. To prompt the conversation, the final presenter, **John Kaddis, VP of Investments Advisory & Brokerage Services with UBS Financial Services**, presented a well rounded picture of employer considerations to review when considering strategic planning.

Of the information covered by John, the conversation hovered on the WIIFA (what's in it for the associations) of offering employee financial packages, especially for the associations with 5 or less employees. John was able to share a new cost-effective plan known as the **Safe Harbor 401K plan** which has a low annual matching cost and a \$500.00 cost to maintain.

Another point of interest focused on the increasing need for establishing an elder parent assistance plan which includes financial, physical, and emotional resource assistance. Employers who have the ability to offer assistance for this increased need will have a competitive edge should they find the means to support these needs in their benefits packages.

One last point of interest John shared was an emerging trend in the Gen X'ers and soon Gen Y'ers seeking to invest monies for children bound for higher education. Associations can now offer a group **529 college savings plan** with the benefit of no cost to the employer and tax-deferred money to the employee

The questions John left on the table as "essential for discussing" included how associations as employers in a competitive labor market will:

- Set-up and maintain retirement savings plans
- Offer group insurance (disability, life, health)
- Provide guidance for college costs, caring for elder adults

Having innovative answers to these questions will provide associations a position of competitive advantage.

What does your exit strategy look like?

Think Tank Forum Discussion #3

For this discussion the group was divided into three sub-groups. Each was given a set of questions to address based on the data collected at the beginning of day one, along with the pre-survey responses. For many, this was the most intriguing conversation, leading to some concrete decisions on behalf of their leadership role for the associations as well as personal decisions for later on in life.

1. What is the “Board Philosophy” about how employees should communicate retirement to the Board? – When, how, etc.
2. What is “the actual age” of retirement?
3. How can you retire “gracefully” – what is your opinion of that for self? As a Board?
4. What are the pro’s, con’s of hiring on retired staff as consultants?
5. What advice do you have for making the “psychological transition” into retirement – (whether that means not working, changing the type of work you do, owning a business, etc.)

Below are the responses of each sub-group as reported out in the session.

Question #1 <i>What is the “Board Philosophy” about how employees should communicate retirement to the Board? – When, how, etc.</i>	
Group A	<ul style="list-style-type: none"> • CEO – BD – work with them • Board put Board member to interim/replacement • Conflicts of interest cause you to choose • Employee level up to CEO; exempt – 30 days, salaried 2 weeks • Put into writing (policy) – do not grandfather “old policy” people • If retiring – give 30 days notice • If going somewhere else -- _____? • Depends on what stage you are asked
Group B	<ul style="list-style-type: none"> • Nothing formal – discussion between CEO and Board chair • Contract ends • No board philosophies • Exec’s responsibility for other employees • Some bylaws • Spell out retirement specifics
Group C	<ul style="list-style-type: none"> • Top Executives <ul style="list-style-type: none"> ○ 6 mos ○ 2 years ○ 2 mos • Employees <ul style="list-style-type: none"> ○ 2 weeks or more

Question #2 <i>What is the actual “age” of retirement?</i>	
Group A	<ul style="list-style-type: none"> • Be sure you are ready to lose power • You could be cut loose sooner than you planned • Is it your decision to retire? They may retire you! • Depends on health and ability and interest (FIB) • No dictate as with others professionals who ARE dictated by law (pilots, doctors) • The age of having good financial position • Retiring from THAT position – not necessarily “work” altogether
Group B	<ul style="list-style-type: none"> • No actual age • Board may think CEO is no longer “kickin” butt!
Group C	<ul style="list-style-type: none"> • Attitude and health • Depends on effectiveness of the individual

Question #3 <i>How can you retire “gracefully” – what is your opinion of that for self? As a Board?</i>	
Group A	<ul style="list-style-type: none"> • Talk it over with family before you do it • Honest, tactful reasons for why • Are you ready to LET GO? YOU NEED TO LET GO • Environmental scan of reality • Your tenure, your reputation and value are considerations • Think long term about what your future will be like • Manage expectations about life after you leave
Group B	<ul style="list-style-type: none"> • Beware state and federal law
Group C	<ul style="list-style-type: none"> • Professional help • Depends on relationship • Fixed time period • Hire deputy • Carve out one area • Flex time

Question #4 <i>What are the pro's, con's of hiring on retired staff as consultants?</i>	
Group A	<ul style="list-style-type: none"> • Annuity not hands on contract (Give specific project) • No board contact • Do not emasculate new CEO • Sickness/death exits awkward re graceful w/board
Group B	<ul style="list-style-type: none"> • Pro – can be a graceful retirement • Provide plenty of time • Create an exit clause in contract • Two different things <ul style="list-style-type: none"> ○ Moving to another job ○ Versus – retirement • Define role if retiring CEO goes on the Board • Death, retirement, leave – need procedure (use succession plan for each) <ul style="list-style-type: none"> ○ Large assn example – hire a second in command to work with CEO for one year, then transition ○ Small assn – use interim CEO (especially if retiring CEO has longevity with the assn)
Group C	<ul style="list-style-type: none"> a. Good idea

Question #5 <i>What advice do you have for making the “psychological transition” into retirement – (whether that means not working, changing the type of work you do, owning a business, etc.)</i>	
Group A	<ul style="list-style-type: none"> • You go from being on the A list to Z list • Identity crisis • Most plan to do something else • Figure out what feeds your soul from work and get it in later stages • Best volunteers are from (those who figure out what feeds their soul) who know they need to be of value, of service • If start own business, look to others in network to see what support may be there • If retire, stay active and connected w/spouse re plan together (they have their own plans too!) • Spend it all or leave legacy?
Group B	<ul style="list-style-type: none"> a. Retirement Plan b. Have avocation c. Start consulting with board approval to help transition <p>What’s the “next” thing (not retirement)?</p>
Group C	<ul style="list-style-type: none"> b. no plan after you retire (not talking about financial plan) c. volunteer with another association d. phase into retirement e. work at something f. virtual association g. make a total change h. identity?

Final Comments from Wrap-Up

To wrap-up the session, the group was asked to provide their most outstanding thoughts across the two day period. The comments below capture the highlights according to the group.

Bright Ideas About the IN’s of HR for Association Management

- We need to be smarter and more technologically savvy about younger candidates and employees
- At the same time, we must not alienate our older workforce
- Having staff meetings with the whole staff will improve the communication and engagement of employees which will contribute to higher rates of retention
- We need to address feelings of inclusion by all
- In hearing about the differences between the generations, at least one individual is convinced of not wanting to work with Gen X or Y

Bright Ideas About the UP’s of HR for Association Management

- We now have different techniques and real value in a report we can share with our

association
<ul style="list-style-type: none"> • It is okay to be flexible with students (validated)
<ul style="list-style-type: none"> • More appreciation of garbage management- thanks to Ken Baylor!
<ul style="list-style-type: none"> • Key-in on three areas of focus: attitude, service, and delivery
<ul style="list-style-type: none"> • Have more fun in the office – don’t think we do enough of this today
<ul style="list-style-type: none"> • Make sure we value employees and show appreciation

Bright Ideas About the IN’s of HR for Association Management
<ul style="list-style-type: none"> • PLAN – but keep quiet until you are ready to make the transition
<ul style="list-style-type: none"> • There is another life out there beyond “retirement from the association” and you can be able to let go
<ul style="list-style-type: none"> • Retiring from the association is not just your decision – it impacts the members who remain, those who are coming in , and potentially your loved ones at home who may not be on the same page as you

2006 Think Tank Participants

- Carol Austin, PRP, CAE
- Ken Baylor (speaker)
- Jon Bednerik, CAE
- Janegale Boyd
- Jim Brainerd, AAI, CAE
- Joan Brannick (speaker)
- Craig Bromberg (speaker)
- Keyna Cory, Foundation Chair
- Judy Gray, FSAE President/CEO
- Frank Herhold
- Bill Hunter, APRP, CAE
- John Kaddis, CFP (speaker)
- Teresa King Kinney, RCE, CAE
- Klein Merriman
- David Mica, CAE
- Al Pasini
- John Periard
- Bill Phelan, CAE
- Kathy Potts (facilitator)
- Donna Ross, CAE
- Larry Scovotto, CAE
- Fred Segal, CAE
- Stephen Trickey
- Latoya Washington, FSAE staff liaison
- Rae Whitt
- Wilson Wright, CAE