

PSAE Society Scene

Pittsburgh Society of
Association Executives
September 2008 | Issue 10

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PRESIDENT'S MESSAGE

Dear Colleagues,

Welcome to a new year for the Pittsburgh Society of Association Executives (PSAE). PSAE is YOUR organization and I, along with the Board of Directors, are honored to serve as stewards of this very special association for association executives and our association partners.

This year promises to be another special year for PSAE as we continue developing programs, services and networking opportunities. We started the year off with an insightful discussion on trends in associations at the annual CEO/CAE breakfast with John Graham, the president of the American Society of Association Executives (ASAE). John followed his discussion with a dynamic overview of several ASAE studies. One of the issues that will have a great impact on non-profit organizations, including associations, is the new IRS Form 990. Please see the article on the Form 990 in this newsletter to learn more about this issue.



Our September luncheon was also very special, as Mark Leahy took participants on a "green" tour of the David L. Lawrence Convention Center. I want to personally thank some of the people who made our September meeting so special: Craig Davis, John Graham, Mark Leahy, Joyce Lee, Linda Paris and the staff of the Convention Center.

Our October meeting features an up-to-the-minute political update by Jon Delano, the Politics & Money Editor for KDKA-Television. We will also be learning about how technology has changed the way we work and develop future leaders through a presentation by Bob Allen of the Dale Carnegie Institute. Thanks to President-Elect and Program Committee Chair, Lisa Rawa, this year's programs promise to be timely and interesting.

Here's a preview of other PSAE offerings this year:

- The Annual Association Master's Conference on March 6, 2009 at the Pittsburgh Marriott North in Cranberry Township, Pennsylvania
- Social events such as the Annual Holiday Program and Luncheon and the Annual Dinner
- The opportunity to study for the CAE Exam with a PSAE study group
- Opportunities to participate in PSAE committees
- Information and communications through the newsletter and the website
- Opportunities to recognize our colleagues through PSAE's awards

In addition, the Board of Directors has been working on several other initiatives. Specifically, Linda Paris and Rick Strunk have developed sponsorship opportunities for PSAE programs, the newsletter and the website. In addition, PSAE has been part of a group of other associations discussing how we can all work more collaboratively. These are both very important initiatives for PSAE as we continue to look for ways to enhance our programs and services.

I invite you to join us in our programs and social events this year. The PSAE Board of Directors also welcomes your comments, suggestions and ideas as we continue to develop PSAE programs and services.

Sincerely,

Patricia J. Raffaele

PSAE Event Calendar

Friday, October 3, 2008 | *Sheraton Station Square* | Political Insights and Tomorrow's Leaders

Thursday, November 6, 2008 | *Marriott Airport* | Prospecting in Difficult Times

Friday, December 5, 2008 | *TBA* | How to Network and Holiday Luncheon

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NEW IRS FORM 990 - HOW ARE NON-PROFIT ORGANIZATIONS AFFECTED?

New Governance Responsibilities for Directors, Officers and Board Members under Form 990 By Kathy B. Houston, CPA, Houston Walker & Associates, LLC

After much discussion, the IRS has put the finishing touches on the redesigned Form 990 effective for the 2008 tax year (returns filed beginning in 2009). For those of you who have prepared this form in the past, the new Form 990 is nothing like the old one. Most think of the Form 990 as reporting only financial activity of an organization. Think again! The redesigned 990 now holds the key to the entire organization. With eleven (11) pages of core forms and sixteen (16) supporting schedules, the result is to enhance transparency, promote compliance and yes--- minimize the burden on filing organizations.

The IRS has noted the major goals are to ensure that the form collects the appropriate information for the type and size of the organization. With that in mind, this public document was designed to paint a



IRS FORM 990

picture of the organization in the mind of the reader. Highlighted below are some of the more significant changes that affect most organizations:

Part VI – Statements Regarding Governance, Management and Disclosure:

1. Do you have a conflict of interest policy and if so, are annual disclosures required?
2. How is compliance with this policy monitored and enforced?
3. Do you have a whistleblower policy?
4. Do you have a document retention and destruction policy?
5. Do you follow the rebuttable presumption of reasonableness for determining compensation for the CEO, other officers or key employees?
6. Do you have a written policy to review investments or participation in joint ventures or affiliates and to safeguard exempt status?
7. Was a copy of the 990 provided to the governing body before it was filed? The organization must describe the process, if any, used to review the 990. (*Note – Board members should realize their fiduciary responsibility*)

Part VII – Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees and Independent Contractors - Must disclose compensation to current & former officers, key employees or highly compensated employees who received more than \$100,000 and former directors or trustees who received more than \$10,000 for serving as directors or trustees.

Schedule J- Supplemental Compensation Information

1. Requires full compensation disclosure with breakdown by type of compensation.
2. Identify the process for review of CEO compensation.
3. Must disclose payment of first class travel, companion travel, discretionary spending, housing allowance or personal residence, health or social club dues, or personal services provided.

Immediate implementation is required for organizations with gross receipts greater than \$1 million and/or total assets greater than \$2.5 million. Organizations under these amounts can file form 990-EZ during the phase in period. (See <http://www.irs.gov/charities/article/0,,id=184445,00.html> for phase in details) Draft copies of the Form 990 may be obtained at <http://www.irs.gov/pub/irs-dft/f990--dft.pdf>. Print out a copy and begin reviewing it NOW, as implementation is just around the corner. For further information you may contact us at www.houstonwalker.com and by telephone at 412-459-0002 or 724-223-9465.

NEW MEMBERS

Michelle Ciaramella
Sales Manager
Pittsburgh Airport Marriott

Janis Deitch
Director of Administration
American Coke and Coal
Chemicals Institute

Sara Fritz
National Sales Director
VisitPittsburgh

Patti Ward
Executive Director
Three Rivers Advertising
Specialty Association

Mary Jo Depp
Customer Service Manager
Oncology Nursing Society

Paula Rieger
CEO
Oncology Nursing Society

Jen Krause
Marketing Manager

Jim Morton
Marketing Manager

John Zaphyr
Marketing Manager

Anne Snively, CAE
 Director of Periodicals
 Oncology Nursing Society

Mike Bazy
 Director of Membership/Marketing
 The Minerals, Metals
 & Materials Society

NEW CERTIFIED ASSOCIATION EXECUTIVES

Ready to achieve a new level of professional growth and recognition? The Certified Association Executive (CAE) program is designed to elevate professional standards, enhance individual performance, and designate association professionals who demonstrate the knowledge essential to the practice of association management. Founded in 1960, the CAE program stands as a mark of excellence and has evolved to reflect what it takes to manage an association in today's challenging climate.



During the September 12th program, the new CAE's were recognized by ASAE President John Graham. PSAE is pleased to congratulate the following new CAEs:

Michele Feder, CAE
 Executive Director
 PHRA

Diane Scheuring, CAE
 Manager, Member Services
 Oncology Nursing Society

Anne Snively, CAE
 Director of Periodicals
 Oncology Nursing Society

DYNAMIC BUSINESS MAGAZINE WINS APEX AWARD

Dynamic Business magazine, the flagship publication of SMC Business Councils (SMC), has won an APEX 2008 award for publication excellence.

Editor Mary Heindl said, "The winning entry was the March 2007 issue, which focused on 'Filling the Manufacturing Workforce Pipeline.' We covered the need for skilled workers, which requires technology-based workforce training, and then went on to describe many of the courses that are available in the western and central regions of Pennsylvania." Heindl was also the recipient of PSAE's Joe Gilbert Outstanding Association Executive Award in 2007.

This is the fifth APEX Award the publication has received. The competition sponsor – Communication Concepts – received 4,500 entries from professional communicators in for-profit and non-profit associations. 1,393 awards were presented in 110 subcategories to organizations across the United States, Canada, South Africa, and the United Kingdom.

The *Dynamic Business* production team includes the SMC Staff: Publisher Lee Taddonio, Editor Mary Heindl, and Advertising Manager Carol Winterhalter; Graphic Designers Dawn Kostilnik and Tim Kostilnik of Kostilnik Associates Graphics, Inc.; Photographer Jim Papariello, James Papariello Studio; and, Mark Bedel representing First Impression Printing Company.

SMC Business Councils is a non-profit trade association headquartered in Pittsburgh with a branch office in Harrisburg. Information about SMC can be found on the Internet at www.smc.org.

YOUR BUSINESS WRITING SHOULD MATCH YOUR PERSONALITY

Many times, dealing with employees or customers requires you to follow up in writing or e-mail. But, many times the personality you have projected over the phone or in person to this same audience becomes lost when you create letters, memos or reports.

The following helpful hints will help ensure your readers get the same impression of you in print as they did in person. These hints will also help you save time, get better results and actually have fun with your writing tasks.



SMC Business Councils



Al Borowski

Helpful Hint # 1 Write to be understood, not to overwhelm.

Your goal in business writing should be to inform people. This means you need to express ideas in a fashion your readers can read quickly, understand, remember and act upon.

Let's put that another way. Keep your business writing conversational. Your business writing should sound as natural as a telephone conversation. That's all business writing is - conversation on paper.

I seriously doubt you start a conversation with a friend, coworker, boss or client, "per your request."

Also avoid your academic tendencies to impress people with your vocabulary. You are not writing to get a grade. You are writing to inform. Rather than paradigm, use model, pattern or example. Rather than subsequently, use after or later. Don't make people guess what you mean. Tell them. Give them a warning, not a caveat.

In his book, "Talking Straight," Lee Iacocca wrote, "write the way you talk. If you don't talk that way, don't write that way."

I will add a side bar to Mr. Iacocca's sound advise. Write the way speak; then, edit, edit, edit. Check your first draft to ensure you have used complete sentences and correct spelling, punctuation and grammar.

Helpful Hint # 2 Become intimate with your grammar checkers.

This is another way of saying always leave time to edit and possibly rewrite your first draft. Someone once said, "There's no such thing as good writing, just good rewriting."

I realize in the hectic business world, finding time for editing and rewriting becomes a challenge. However, investing the time to run your writing through grammar checkers pays huge dividends.

Grammar Checkers will help save you time, improve the quality of your writing, and eliminate the embarrassment of misspelled words, incorrect grammar or confusing writing styles.

Helpful Hint # 3 Average 18 words per sentence.

The important word in this helpful hint is "average." That does not mean every sentence must be 18 words long.

I feel confident most of you have heard the expression, "in 25 words or less..."

"In 25 words or less, tell us why we should send you to Hawaii."

Please understand the importance of this concept. Do you understand they are giving you the first seven words? "You should send me to Hawaii because..." If you take the first seven words they give you, you must then state your reason in 18 words!

Helpful Hint # 4 Find some friends.

Business writing is a team sport.

Every day, you compete with thousands of the best letter, memo, proposal and e-mail writers in the world. That's the "sport" part of the equation. Sports also involves "winning." Winning for you means getting results with your writing.

Increase your chances of winning by letting at least one other person read what you have written before sending the document. Your chances increase if you ask more people to review it. Your friends are looking at your words for the first time. They will find things in your writing you never dreamed you put in there.

After reading your writing, your friends will likely give you comments such as, "I don't understand this part." "What do you mean by this?" "You forgot ____." "You can't say that." "You misspelled some words."

Receiving these comments from your friends is a lot better than receiving them from your bosses or your customers.

Helpful Hint # 5 Use a twenty-four hour drawer.

This means putting what you have written in your desk drawer for one day before sending it out. I know, you think I'm crazy. But, you will find the more distance you put between you and your first draft, the better your writing becomes. Waiting 30 minutes before you edit your first draft may mean the difference between a successful document or an embarrassing situation.

You have at least two good reasons why you should use the 24 hour drawer. First, if you write a document and read it immediately after writing it, are you really reading it? No! You are remembering all the good ideas you wrote about. You don't even see half the words.

Second, in the writing stage, we use the creative side of our brain. In the editing stage, we use the analytical side of our brain. Using a 24-hour drawer means allowing enough time for your brain to switch from the creative to the analytical. This takes time.

The more time you allow between the writing and editing stages, the better your writing becomes.

Helpful Hint # 6 Read your writing out loud.

That is not an invitation to a rubber room. That is a good technique to test your writing. If you read your writing out loud, you will see how long the sentences are. If you run out of breath before you run out of words, you know your sentences are too long. Remember the helpful hint - average 18 words per sentence? That hint helps ensure you don't run out of breath too often.

Reading your writing out loud forces you to slow down to look at each word. Looking at each word helps ensure the sentence says exactly what you want it to mean.

Helpful Hint # 7 Proofread, proofread, proofread, proofread.

Obviously, helpful hint # 7 stresses the importance of proofreading. Let me tell you why I use the word proofread four times. First, I am reminding you that you don't have to do all that proofreading. Remember I said find some friends? You should do one version of proofreading, your friends should do another, your spell checker's and grammar checkers should do another.

I also stress the importance of proofreading because the minimum you should do it is twice. The first time you proofread, you proofread for content. Is my message clear, correct, concise, complete, and conversational? This second time you proofread, you proofread for mechanics. By mechanics, I mean your spelling, punctuation, grammar, format and approach.

Proofreading is your last shot at getting the your writing to the point where you will be proud of it and get the results you're looking for.

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JUST ANOTHER BORING BUSINESS PRESENTATION?

Should business presentations be delivered as effectively as keynote speeches that are intended to inspire and engage? Board rooms and staff meetings tend to be the most boring places to engage people. Reports are read and too many details on too many slides are presented. Telling stories and using compelling statistics in business presentations *is* important if the ultimate goal is to sell an idea, or to motivate and inspire your staff. Your leadership skills and ideas will be best "sold" by selling yourself. Body language and voice will be key. Are *you* giving thought to the way you come across in this setting?

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Lynda Stucky is an expert at working with people to develop communication skills which enhance soft skills like intelligibility, credibility, and influence.

If you would like Lynda to present at your company visit her website at www.clearly-speaking.com and her blog at lyndastucky.wordpress.com or contact her at lynda@clearly-speaking.com or 412-264-1717.



Lynda Waltner Stucky

CAREER RESOURCES

MARKETING DATA ANALYST

A materials-science professional society (www.tms.org) in Cranberry, PA, seeks an individual with excellent marketing and data analytics skills to research, analyze, and report on customer and prospect data. Includes creating customer profiles and behavior models. Other key responsibilities include determining target audiences for products and services, marketing plan development, administering member dues renewal process, and administering electronic marketing activities.



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SPONSORSHIP OPPORTUNITIES

Would you like the opportunity to meet professional executives who serve the trade, technical, business, professional, and philanthropic associations?

Pittsburgh Society of Association Executives conducts monthly meetings throughout the Greater Pittsburgh area and has a special offer for you to meet local industry professionals.

Exclusive sponsorship of one monthly meeting includes:

- Company logo on our website
- Company logo on all marketing materials for the meeting
- Tabletop display next to registration
- Company sponsorship mention by PSAE president before morning seminar
- Introduction by PSAE president and brief presentation before lunch
- Continental breakfast and plated lunch
- Participation in the seminar and lunch programs
- Discount price of \$300.00

Available Dates:

Friday October 3

Thursday November 6

Friday December 5

Thursday January 8

Friday February 6

Friday March 6 (Annual Conference)

Friday April 3

Thursday May 7

For more information and to confirm availability contact:

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