

The TMG Connection

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Sarbanes-Oxley Hits Not For Profit World; Form 990 Redesigned

All of us who lived through the Enron and WorldCom corporate scandals became familiar with the Sarbanes-Oxley Act and knew that, at some point, these reforms would have an impact on the non profit sector. For the past 10 months, there has been vigorous debate and dialogue between the Not For Profit world and the IRS over how this would play out.

In the spring of 2007, the IRS issued the draft of a re-design of the Form 990 – the annual reporting mechanism for the non-profit community with operations of greater than \$25,000 USD. Since then, TMG and the rest of the non profit sector have been involved in a spirited back and forth with the IRS. Two organizations in which TMG participates have carried the message for the sector; the American Society of Association Executives (ASAE) and the Association Management Company Institute (AMCI - TMG President Gregg Talley just joined their Board of Directors).

The form and supporting schedules had not been significantly revised in over 30 years, while the size and scope of the non profit sector has exploded to more than one million organizations. The intent of the revisions was to “enhance transparency, promote tax compliance and minimize the burden on the filing organization.” The original draft requested volumes of information and detail that not only would have drastically increased the reporting and cost to organizations to compile and maintain, but would have presented a distorted view of operations to the public through the form itself. Through a series of two revisions in response to ASAE, AMCI and hundreds of individual comments, the IRS has significantly modified the form, the information requested and the accompanying instructions.

The result is not yet finalized, but it is clear that most not for profits will need the following policies in place: A conflict of interest policy with an enforcement program; a whistle-blower policy; a written document retention and destruction policy; and a distinct audit committee. TMG currently has some of this as a result of our own internal management control and verified by our certification by AMCI. We will be providing draft policy language on all of this to our clients throughout 2008.

There is a three year phase-in for the new procedures and forms that will impact TMG clients. For the 2008 tax year, organizations with gross receipts less than \$1 million and total assets of less than \$2.5 million may file the Form 990-EZ instead of the new Form 990. For 2009 and 2010, the thresholds are lowered so that, by 2011, all not for profits will use the new Form 990.

TMG will be working with the independent auditors and client treasurers and Boards to communicate this information and any budget adjustments necessary to reflect the higher audit costs from outside auditors to complete the new information.

As Directors and Officers, this will impact you with your fiduciary responsibilities to the organization and members. TMG will continue to update you throughout the year. ■

Current Trends in Sponsorship within Non Profits

Several major industry professional societies, on whose Board's TMG employees serve, have recently reviewed and refined their sponsorship programs with the assistance of IEG, the Chicago-based specialty consulting firm. The trends and themes resulting from these efforts can, and are, being applied to TMG clients to increase sponsorship revenues to our clients, while increasing the return value and hence, commitment from the sponsors.

Event and organizational sponsorship is the fastest growing marketing segment in the industry right now. Association sponsorship accounts for only 3% of the total, but represented over \$340 million dollars in 2005. IEG estimates that this will double in the next 3-5 years.

IEG's process with these industry organizations is based on their research into the wants and needs of the sponsors who provide the funding to the non profits, as well as looking at the longer term interests of the non profits. It begins with an asset and event review and valuation process to ensure that the organizations are maximizing their "sponsorable" assets, and that they are valued competitively with industry benchmarks. It is further driven by the hypothesis that the organizations are better served by a deeper relationship with fewer key sponsors than a more shallow, transactional, relationship with many.

This is supported by their research with the funders who generally are looking for the following: a deeper, year round relationship rather than one-time event sponsorship; meaningful recognition; proprietary affiliation with specific programs and events; and the opportunity to network with members and thought-leaders, all ending in measurable results for the sponsor.

The outcome of this is a move to more strategic relationships based on levels of sponsorship that are built around a specific bundle of benefits and recognition. This is predicated upon a clear understanding of and communication with an organizations key and potential funders. The specific items within each package, even at the same level, might be different based on the needs and wants of the individual funder and what they value most.

TMG has teamed with client volunteer leaders for years to build industry relationships and mutually beneficial sponsorship programs. From the beginning, we always emphasized a bilateral approach: using both a menu listing of items for smaller potential sponsors, as well as the level approach for more committed sponsors. We are now refining our methods to conform to the data coming out of the IEG process.

TMG has also centralized the marketing and sales related to sponsorships within a newly focused team that includes exhibit sales and marketing, and general association/client marketing. For one of our newest clients, TMG recently reformulated their sponsorship program and has already exceeded budget.

We are excited by how we can work with all our clients to further increase and deepen their sponsorship programs based on our involvement and leadership in the association management community. ■

Saturday night stays may make a comeback as airlines look to boost revenue

According to a Pioneer Press report, airlines are revisiting Saturday night and multiple night stay requirements, a strategy that had fallen out of favor in recent years, to combat high oil prices and a slowing economy. The flights with those rules attached are being picked carefully and travel analysts say they don't appear widespread. But the current economics of the airline industry indicate travelers soon may see more of them, according to the report.

The report cites recent conference calls to discuss quarterly earnings, in which a handful of airlines mentioned their fondness for the Saturday night strategy.

Source:
www.twincities.com

A New Mission, A New Vision, And A Renewed Commitment To You!

2008 Tradeshow Outlook

According to the 2008 Data Book released by Tradeshow Week, the average business-to-business tradeshow in 2008 will have 142,663 net square feet, feature 403 exhibitors and attract 9,847 attendees, compared with 124,838 net sq. ft., 367 exhibiting companies and 8,859 attendees in 2007.

The directory projects the number of trade and consumer shows in 2008 will be 4,924 and that the shows are expected to draw 89 million attendees and 1.6 million exhibiting companies to a total of 694 million net sq. ft. of exhibits.

TMG's expansion of its sales and exhibitions staff to meet this growing demand has positioned our clients to be key players in the market and major contributors to these projections.

Throughout 2007, the senior management team at TALLEY MANAGEMENT GROUP, INC. completed an exhaustive review of the client team structure and support services of TMG. The group worked with staff and clients to identify best practices, as well as areas for improvement, that will lead to enhanced client services now and in the future.

Entering 2008, the senior management team used the findings of their research to create a new vision and mission for TMG, and together with the entire staff of TMG, began executing plans to reshape the company.

The vision statement that evolved from this process: *To improve civil society by supporting the missions of the not for profit world, improving the value of face to face meetings and advancing adult education.*

TMG's new mission statement speaks to the emphasis on partnership with clients and staff in reaching this vision and ensuring success for all. It reads: *To ensure the success of our clients (internal & external) by delivering value and excellence in our leadership and services. To support the professional goals and growth of our TMG team members while enjoying what we do together. Excelling in these commitments will sustain the corporation over the long term.*

As a result, TMG has reoriented its focus on providing consistently excellent customer service in three distinct areas:

- 1) Association Management Services to non-profit organizations;
- 2) Event Services to non-profit and corporate entities; and
- 3) Consulting services to any organization.

Integral to these areas is an improved structure for TMG's support services. New resources and processes are being added to improve operations and support for clients.

Interestingly, the inspiration for the approach came from within TMG. "We modeled our new philosophy for the entire company on some successful teams we have within our building," said TMG President Gregg Talley. "We believe this approach will build stronger, synergistic teams that will mean improved client service and greater satisfaction for the staff. Grouping our teams as we have will enable our clients to benefit from greater efficiencies and opportunities for collaboration."

The reorganized groupings have physically relocated staff within the New Jersey office of TMG and, in some cases, staff has been reallocated to work with different clients to support the new structure. The biggest change has been the grouping of TMG's non-profit society clients into four categories under the Association Management Services umbrella. TMG's strategy has paired clients of similar scope into Healthcare/CME, Technology, Trade/Corporate, and Professional Services. ■

Welcome!

TMG's New Jersey office is pleased to welcome **Ross Nunamaker** and **Navin Samuels** to the Trade and Corporate Services' group. Ross will serve in the position of Associate Executive Director for the HCMA team, while Navin will handle accounting for HCMA and other clients.

Also joining the HCMA team is **Erin Miller**. Erin will serve as HCMA Logistics & Meeting Manager.

Alexandra Springer recently joined TMG's Meetings and Events Services group as Meetings & Exhibits Manager. Alex works with AATOD, ARO and other clients.

Staff Accountant **Lauren Dunn** has joined TMG's Accounting team.

AP Coordinator **Susan Mason** has also joined TMG's Accounting team.

Kathy Suckiel has joined the Professional Services team. Kathy works with AAfPE, REEA and ISMTE.

Anthony Jentsch has joined the Operations team to assist with IT Support.


Dawn Durkee has joined the IGDA client team as an Administrative Assistant.

Karen Bloom has joined the Operations Team as Operations Coordinator.

Joining the SIGGRAPH Team is **Joseph Dyer** an intern from Widener University.

TMG Introduces Web Services Division

With the Association field placing more emphasis on "communities" and Web 2.0 integration (increased online user interaction), the TALLEY MANAGEMENT GROUP, INC. is introducing a new service line created to meet the rapid changes in membership management and networking. By partnering with independent Web developers and bringing on new IT resources in-house, TMG has created a new Web Services Division under the direction of CFO Andre Solomon and headed by Technical Lead Bryan Buccella. A few of TMG's existing clients and new clients coming on board are among the first to take advantage of this new service line.

"We recognize our clients' evolving needs, as well as the opportunities that the Web 2.0 experience has created," said TMG CFO Andre Solomon. "We have several tech-savvy clients and we're attracting more of them to our business every year. Creating the Web Services Division fits our core values for service delivery, enables us to lead our current clients toward this evolution taking place in the association realm and positions us to better serve potential clients." 


PCMA Honors Gregg Talley



TMG President Gregg Talley was presented with the Professional Convention Management Association (PCMA) *Distinguished Member of the Year Award* at PCMA's annual meeting held in Seattle, January 13-16, 2008. The award honors members who have made exemplary contributions to PCMA in areas such as volunteerism, committee work, community service, board positions, mentoring, speaker experience, author experience, and other member specific achievements.

Talley is a long-time volunteer with PCMA who led the organization through a major strategic planning exercise and the transition to a new President and CEO. He is a past national Chair of the Board and continues to serve on the PCMA Foundation Board.

"This award recognizes the commitment that Gregg Talley and the TALLEY MANAGEMENT GROUP, INC. have to the professional development of their team and the spirit of volunteerism that supports and energizes the staff and client organizations of the TALLEY MANAGEMENT GROUP, INC.," said Deborah Sexton, PCMA's President and CEO, in announcing the award.

In addition to being honored with this prestigious award from PCMA, Talley was also recently nominated to serve on the Board of Directors of the Association Management Company Institute, (AMCI), the trade association of the association management company industry. 

TMG Welcomes New Clients

The Health Care Communications & Marketing Association (HCMA) and the International Society of Managing and Technical Editors (ISMTE) have recently joined the client family at TALLEY MANAGEMENT GROUP, INC..



The Healthcare Communication & Marketing Association (HCMA – www.TheHCMA.org) officially launched on January 1, 2008. It represents a consolidation of the best offerings of programs and services of the memberships of the Healthcare Marketing & Communications Council, Inc. (HMC), the Medical Marketing Association, Inc. (MMA), and the Midwest Healthcare Marketing Association (MHMA).

Simply stated, the HCMA offers professionals, who communicate and market life science products, the opportunity to amplify their career by expanding their knowledge and current network in order to realize their potential as an industry leader.



TALLEY MANAGEMENT GROUP, INC. was instrumental in the 2007 formation of the International Society of Managing and Technical Editors. ISMTE is an individual-based membership organization created to promote the professionalism of managing and technical editors and the value of the position. The Society is designed to empower those who work in an editorial office to understand how they can and should influence journal policies to improve the performance and quality of peer review and author services.

ISMTE will provide: a forum for managing and technical editors to raise issues and promote a better understanding of the administrative responsibilities associated with the role; continuing education and training; a network for referrals, jobs and information; and a set of industry-wide standards within the profession. ■

TMG Senior Manager Appointed to SLC CVB Board



Lisa Astorga, CMP, has been appointed to the Salt Lake City Convention And Visitors Bureau Advisory Board for a term beginning in March 2008. Lisa is the *Director of Meetings and Conventions* for TMG's Meetings & Events Services group. ■

VA Office welcomes new team members

TMG proudly announces the continued growth of our Virginia Office. Recent additions to the team include Meeting Manager **Shannon Welch**; Exhibits and Sponsorship Sales Manager **Terri Sullivan**; and Administrative Assistant **Rebecca "Becky" Girthoffer**.

Among the clients these professionals work with are the American Association for Paralegal Education, American Women in the Metals Industry, Federation of State Boards of Physical Therapy, Glass Packaging Institute, International Game Developers Association, International Society of Managing and Technical Editors, National Society for Experimental Education, and the Snack Foods Association.

Are Leaders Born or Made?

By Wally Bock

For centuries people have debated whether leaders are born or made. Several decades ago researchers started trying to answer the question. The debate goes on, even though we know the answer. It turns out to be a little of both. Leaders are sort of born and they're always made. Knowing the details will help you develop effective leaders for your society.

Leaders are Sort of Born

It seems like there's only one thing that a person needs to actually be born with in order to be a leader later in life. That's intelligence. A leader needs to be smart enough. Effective leaders aren't necessarily the smartest people in the room or the society or even on the team. But they have to be smart enough to do the job they're assigned.

What's more important is what kind of person the potential leader is when he or she becomes an adult. The person who emerges from adolescence into young adulthood has the psychological and character traits they'll demonstrate for the rest of their life. Some of those matter for leadership.

By the time a person becomes an adult we can tell if they can help other people achieve results. That, after all, is what we expect leaders to do. We expect them to achieve success through a group. We expect them to help their subordinates grow and develop. By the time a person becomes an adult, we can tell if they want to achieve objectives or if they just want to go along and take it easy. We expect leaders to be responsible for achieving results. You can have a marvelous life without a results focus, but if you're going to lead successfully you have to have the drive and willingness to be measured by the results of your leadership.

By the time a person becomes an adult, we can tell if they are willing to make decisions or not. Lots of people wake up every day and let the world happen to them. But leaders must be able and willing to make decisions that affect themselves and others. By the time a person becomes an adult we can tell if they have the basic qualities that we expect leaders to have. We can determine if they're smart enough to do the job. We can tell if they are willing to help others to achieve results as a group. And we can tell if they will make decisions.

Those things are essential. People who have them can learn the multiple skills it takes for them to become effective leaders. No matter how they measure up on the key essentials, no one emerges from the womb or from adolescence with all the skills in place to be an effective leader. Everybody has to learn the job. That's why leaders are always made.

Leaders are Always Made

Leadership can be learned by anyone with the basics. But an awful lot of leadership cannot be taught. That's because leadership is an apprentice trade. Leaders learn about 80 percent of their craft on the job. They learn from watching other leaders and emulating their behavior. They choose role models and seek out mentors. They ask other leaders about how to handle situations.

Leaders improve by getting feedback and using it. The best leaders seek feedback from their boss, their peers and their subordinates. Then they modify their behavior so that they get better results. Leaders learn by trying things out and then critiquing their performance. The only failure they recognize is the failure to learn from experience.

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Moving on up!

*Congratulations to **Heather Ludwick** who was recently promoted to the role of Junior Meeting Manager for the Meetings Division.*

***Laura Newcomb** has been promoted to the position of Registration Manager.*

***Martha Kostack** has been promoted to the SIGGRAPH Team.*

In their book, *Geeks and Geezers*, Warren Bennis and Robert Thomas identify the special power of what they call "crucibles." These are trials which teach hard lessons that leaders use as the basis of their strength in later crises. Many of these events can be called "failures," but leaders turn the bad situation to good by learning from it.

Effective leaders take control of their own development. They seek out training opportunities that will make a difference that will make a difference in their performance. Effective leaders look for training programs that will help them develop specific skills that they can use on the job. Then, when they return to work, they devote specific, deliberate effort to mastering in real life what they learned in the classroom.

Marshall Goldsmith and Howard Morgan studied the progress of 88,000 managers who had been to leadership development training. The people who returned from the training, talked about it, and did deliberate work to apply their learning were judged as becoming more effective leaders. The ones who didn't showed no improvement. If you're responsible for leadership development for your organization, you should structure your support for your leaders to recognize that most leadership learning happens on the job. Help people develop leadership development plans. Help them select specific skills training and then work on transferring skills from the training to the job. Help them find role models, mentors and peers to discuss leadership issues. Help your leaders get feedback from their boss, peers and subordinates. Work to create the culture of candor that will make that feedback helpful and effective.


Don't stop there. Make sure that you evaluate your leaders on their leadership work. Reward them and hold them accountable for accomplishing the mission through the group. And hold them accountable for caring for their people and helping them grow and develop.

A Leader's Growth is Never Done

Leadership learning is a lifetime activity. You're never done because there's always more to learn. There are always skills you need to improve. Effective leaders seek out development opportunities that will help them learn new skills. Those might be project assignments or job changes. What they have in common is that the leader develops knowledge and skills that can be used elsewhere.

Effective leaders also seek out opportunities that will increase their visibility. The fact is that great performance alone will not propel you to the top in your career. You also have to be visible to people who make decisions about promotions and assignments. If you're responsible for developing leaders in your organization, set up programs to give your leaders both kinds of development opportunities over the course of their careers.

There's no magic formula for developing quality leaders in your organization. But if you select potential leaders with the essential traits, then support them with training, feedback, on-the-job learning and development experiences and hold them accountable for results, you'll have the leaders you need to shape your society's future.

*Wally Bock is an author, speaker, and coach who helps leaders improve the performance and morale of their teams. Wally is the author of **Performance Talk: The One-on-One Part of Leadership** (<http://www.performancetalk.com/>) and the **Three Star Leadership Blog** (<http://blog.threestarleadership.com/>)* 

Source: ArticleCity.com

Questions Every New Board Member Should Ask

You've just been asked to take on a board role or run for office in your organization. Congratulations! Yet, while your ego has been stroked by the confidence your organization has placed in you, experienced board members suggest you ask yourself the following before you agree to run or begin your service:

Did you know?...

If you're planning a trip outside of the US, but staying within North America, there is another option to a passport called a passport card.

U.S. citizens can apply for the passport card that is cheaper and easier to get than a regular passport, but it is only good for land and sea travel to Canada, Mexico, Bermuda and the Caribbean. It cannot be used if you're traveling by air.

For more information, visit www.travel.state.gov

Source: US Department of State.

1) What do I bring to the table?

Is it knowledge of your field, financial savvy, or something else? If your experience simply mirrors that of the other members already serving on the board, you may wish to decline and put your experience to work with another organization. What you offer should complement what other board members provide, not mirror what they offer.

2) When will I know I've completed my job on the board?

You should invest up to two years to reach very specific goals. Simply serving "just to be there" will drain your time.

3) What has this board accomplished in the past year, two years, five years?

Do you really want to serve on a board that doesn't accomplish much more than meeting and holding retreats? Unless you are convinced you can be the change agent, find an opportunity that better fits your ambitions.

4) May I talk to three or four current board members before I say yes?

Given the opportunity to speak with current members, go to question number one and determine what difference you can make by serving. If the answer isn't clear, perhaps you should consider declining the opportunity. ■

*Adapted from **Executive Leadership**, National Institute of Business Management*

Love was in the air...

TMG celebrated Valentine's Day 2008 in style as staff were treated to breakfast made to order, festive decorations and an extremely competitive BINGO game.

Clockwise: A custom Banner welcomes TMG team members as they enter their offices. Patti MacCarone(left) and Monica Barnaby check out the Bingo Prize Basket. Awaiting their orders are (L-R) Laurie Morris, Kathy Suckiel, Molly Tritt, Dawn Durkee and Linda Wright. ■

