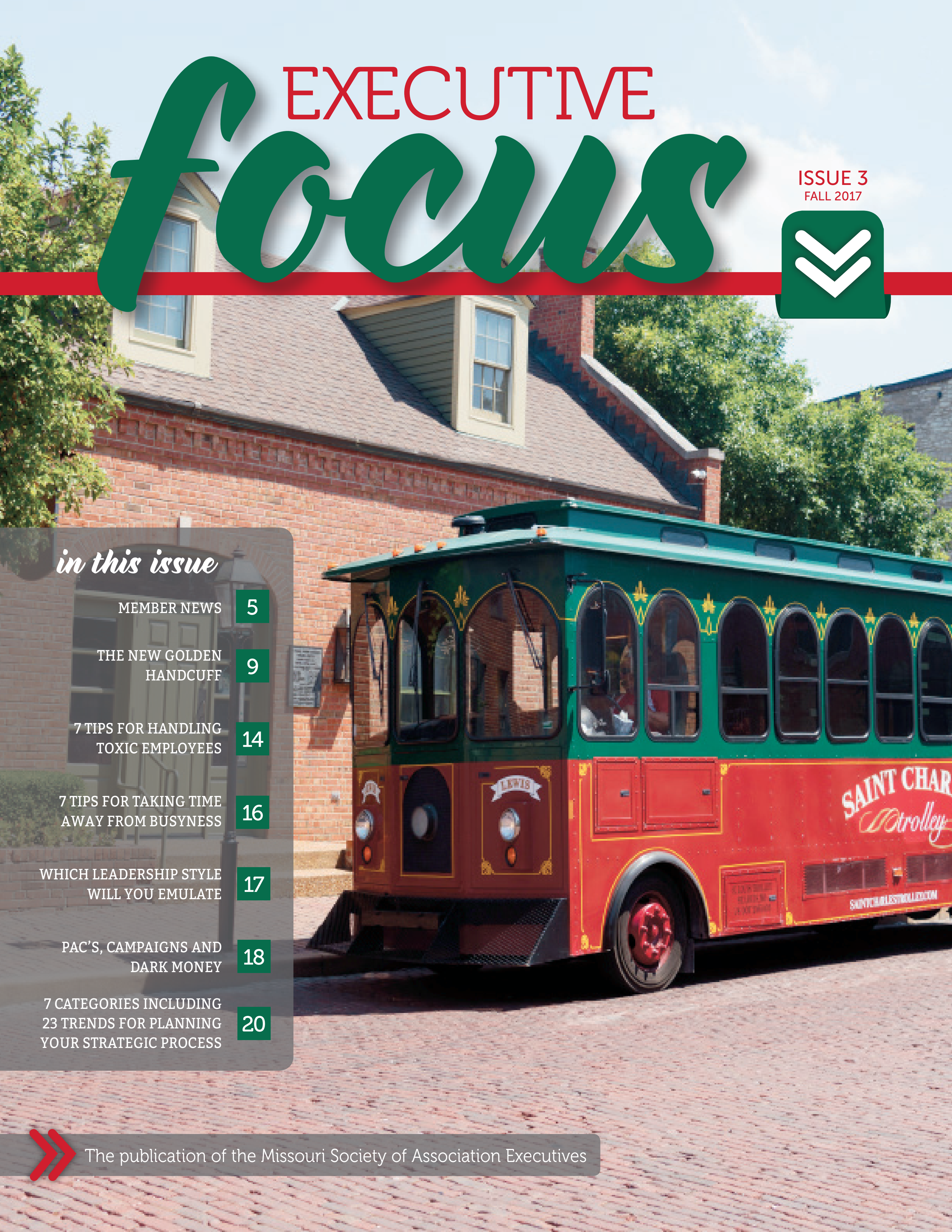
EXECUTIVE focus

ISSUE 3
FALL 2017



in this issue

The publication of the Missouri Society of Association Executives

EXECUTIVE *focus*

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SUBMISSIONS

News items from our membership are welcome. The editorial staff reserves the right to edit and/or reject all materials received. Submissions may be condensed in order to fit the allotted space. Local photographs may be submitted by our members for consideration of cover placement. Please submit photo in high resolution and include a photo release. Deadline for submissions is the 15th of the month preceding publication.

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Contents

2017-2018 Calendar

Board Retreat
October 27-28, Lake Ozark

Membership Meeting and Workshop
November 2, *Doubletree Hotel*
Reception Sponsored by Embassy Suites by Hilton St. Charles

Christmas Party
December 7, Jefferson City, *Country Club*

Membership Meeting
February 16, 2018, Jefferson City, *Doubletree Hotel*

Membership Meeting
April 27, 2018, Jefferson City, *Capital Plaza Hotel*

Membership Meeting
November 2, 2018, Jefferson City, *Doubletree Hotel*

Go to *www.MSAE.net* for current Calendar of Events

Cover

The Saint Charles Trolley is a free trolley service that starts at the St. Charles Convention Center making 8 stops around Saint Charles. The Trolley runs 7 days a week from March 15 to December 31 for more information please visit www.stcharlestrolley.com .

FROM THE PRESIDENT

As I begin my term as President of MSAE I have thought a lot about what this great organization has meant to me over the last 6 years. After working for the Missouri House of Representatives for 35 years I felt it was time to move on and do something else for a change. The association world was something I had my eye on as I was nearing my retirement from the House and low and behold, I actually was hired as the Executive Director for the Missouri Assisted Living Association and started my new career 6 days after my last day at the House of Representatives. What I didn't know though, was the first thing about how to run an association! It was time to learn on the Fly!

After talking to a couple of Association Executives, the best advice I received was from Ryan Rowden. Ryan said "You need to join MSAE"! After learning what MSAE was all about I immediately joined and nothing has been more beneficial than that. Thanks Ryan!

Having the ability to network with other Executive Directors, Meeting Planners and Education Coordinators from other associations has been instrumental in my success as an association leader. Another great advantage I discovered about being a MSAE member has been getting to know all of our wonderful associate members. Establishing great relationships with many of you has helped paved the way for me to make that successful transition from the legislative world to Association work.

I am honored you have chosen me to be the President of MSAE for the 2017/2018 year and look forward to working with the entire MSAE Board and MSAE membership in making the coming year a successful one.

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The Third Industrial Revolution

Wayne R. Shaw, *Five 9s Consulting*

We are at the beginning of a massive change in the way business is conducted. We have blurred the lines between the Internet, mobile communications and corporate networks. We now accept the notion of working away from the office or tele-commuting. Downloading movies on a tablet and watching them at our leisure is changing the way the broadcasting industry is delivering content. Concrete can now be ordered from your smart phone and you can track the truck delivering the product to you. Buying groceries is now a function of ordering them from your device (smart phone, tablet or computer) and having the groceries delivered. We now live in a robotic world, don't believe me, when was the last time you went through an automatic car wash. That is a robot. The world cannot mass produce cars without robots. This is just the beginning.

For companies to move forward and be successful in their industry, they need to embrace the coming change. Did you know that a fully antonymous farming tractor is only a few years away? Now the question becomes how do companies embrace the coming changes? Companies can't look at a very narrow IT focus as we do today. Companies need to look at all the factors that affect our businesses IT infrastructure. Companies need to look at the rise in hacking, locker virus, Cloud computing, government regulations, the Dark Web, yes even Bit Coins. Why, the companies who embrace the change will succeed. Just look at the retail industry. Clicks are replacing bricks. We now have Cyber Monday.

What's new with Five 9s? I now speak on this subject. The Third Industrial Revolution It is a thought provoking speech where we examine how we got here, where here really is and how to move your companies IT department forward. ***Success belongs to those who innovate.***

Drop us a line to talk about this speech or just your thoughts on this subject. We would love to hear from you. At: wshaw@five9sconsulting.com or 888-399-4696

BB&D Opens New Office in Columbia, Missouri

Blitz, Bardgett & Deutsch, LC is pleased to announce the opening of its newest office in Columbia, Missouri. The Columbia Office is located at 414 E. Broadway, Suite 100, Columbia, MO 65201. The Columbia office, along with current offices in St. Louis and Jefferson City, will enable the firm to better serve clients throughout Missouri and the Midwest.

"Columbia is one of the fastest growing communities in the Missouri and consistently ranked among some of the best places to live and do business," said the firm's managing members James Deutsch and Richard Rothman. "We are excited to be a part of the Columbia business community and to assist businesses and individuals there with their legal needs."

Firm member Chris Pieper will be the primary attorney in the Columbia office. His practice focuses on regulatory and government solutions, administrative law, professional licensing, real estate, public finance and tax incentives, environmental law, and state and local tax. Chris received undergraduate and law degrees from the University of Missouri-Columbia and has lived in Columbia for more than 15 years, recently returning to private practice following his time directing the Missouri Department of Economic Development and serving as Chief of Staff to the Missouri Governor.

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MSAE Membership Meeting

DoubleTree Hotel, Jefferson City for ***Thursday, November 2, 2017***

The Potential Difference

by Joyce Layman

THE POTENTIAL DIFFERENCE

We all have incredible potential but the difference between good and great is directly related to how you think.

Change happens, and in today's world, it's the only constant. New initiatives, day to day pressures, technology or too much to juggle on a professional and personal front can leave you feeling stressed out and overwhelmed. Before you can create new possibilities and tackle bolder goals, you need to overcome the greatest obstacle you'll ever face – the four inches between your ears. The good news is that it doesn't need to be complex or confusing.

This program isn't about the soft and fluffy stuff but instead helping people understand how their thoughts, attitudes, and beliefs impact their actions and outcomes. The result is helping individuals achieve higher levels of performance in all aspects of their life, and companies discover new opportunities for success.

Whether stuck at the first level or experiencing new challenges at that next level, this interactive program combines real-world examples, tidbits of science and easy to apply concepts to help you manage your mindset, shift from motivation to engagement and empower you to thrive through change.

Joyce Layman connects you to people, possibilities, and profits. As a former wallflower in the world of business networking, she knows firsthand what it takes to overcome the greatest obstacle you'll face - the four inches between your ears. She was fortunate to tap into information that transformed her life and sought training in The Pacific Institute's cognitive processes. It all starts with how you think.....and builds on how you connect. Applying cognitive processes to the art of connecting earned Joyce the reputation of being a walking LinkedIn. Bob Burg, bestselling author of the Go-Giver calls her the greatest networker in the world. Since 2008, she has helped individuals achieve higher levels of performance, and companies to discover new opportunities for success. Joyce combines her extensive training and experience in the science of mindset and the art of business connections to provide the one-two punch that gives her clients an advantage over their counterparts and their competition.

Joyce Layman ~ 816-536-9006 ~ joyce@joycelayman.com

The New Golden Handcuff among Associations has become Access to Information

Bob Harris, CAE

There was a time when members joined for access to benefits such as health insurance, long-term disability or workers compensation. For numerous reasons such programs have faded or are no longer the domain of associations and chambers.

Others joined for the camaraderie at the annual conference and trade show. Bringing families, they made it a multi-day vacation. Now people are busy, the options for education are extensive and conventions have been trimmed to a day or two.

The programs were "golden handcuffs," benefits so valuable that prospects eagerly joined and renewed for the access. The new golden handcuff among associations has become access to information.

Member Engagement

Associations are ideal platforms for facilitating information exchanges. Information becomes more relevant when it is shared among peers. The platforms take the form of roundtables, circles of trust, peer-topeer discussions and audits.

"Conducting jobsite safety audits provides an opportunity to demonstrate our expertise and professionalism on the ground. This equates to credibility," explains Richard Vincent, executive vice president at Associated General Contractors of Kentucky.

Sharing information unique to the organization answers the most frequent questions of boards, "How do we increase member engagement?"

Information Exchanges

- Twenty Groups
- Benchmarking Groups
- Peer Groups
- Circle of Trust
- Audit Process
- Peer Review
- Solutions Group
- Roundtables

At the Independent Electrical Contractors (IEC) CEO Spenser Villwock, CAE describes their forums as one of the highest ranking member benefits. The groups are comprised of voluntary business leaders in non-competitive markets from across the country meeting periodically to share management success strategies with one another, similar to having a "personal board of directors."

He explains, "The benefit of peer-to-peer information exchange has been known to help members gain insights on solving management and strategy questions that have empowered company leaders with best practices to grow their businesses 4x and beyond. Knowledge sharing is still the critical potency of our associations in a world saturated with information accessible on the internet."

Association Solution

Information exchanges support many aspects in a membership organization:

- Loyalty – Exchange groups require membership and the commitment to be involved.
- Access – Members want to have exclusive access to knowledge.

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The New Golden Handcuff among Associations has become Access to Information

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- **Value** – The information is intended to advance one's career or work setting, offering return on investment for dues paid.
- **Engagement** – Information exchanges require member commitment for involvement in the process.
- **Content** – Through dynamic discussions of information and operations the association learns of member needs.
- **Depth** – Exchanges can involve multiple people and job positions in one company, allowing the association to build relations and awareness deeper into the member organization, i.e. involving marketing, legal or HR professionals.

The Process

Associations are positioned to facilitate information sharing. They manage a body of knowledge associated with the community. They have staff and technology to develop information sharing programs. The association is an independent third party that can guard against anti-competitive concerns.

Traditionally information is delivered through seminars, reports, books and papers. These formats are single-dimensional without much help in understanding and application.

To enhance information the board or a committee starts by considering the unique knowledge associated with the organization. Discuss how to transform information to have more value.

For example, following a Legislative Session a committee might create a regulatory compliance service. Or based on new research, create a guide to benchmarking applicable to a member's specialty or work setting.

It is the two-way exchange that adds value. By delving into knowledge, asking questions among peers, and adding perspectives, the information becomes dynamic.

Examples of Information Exchanges

Information platforms can take varied forms. The key is face-to-face interaction so information can be ingested, discussed and applied for the user's benefit.

Elements necessary for a vibrant information exchange include:

- ✓ **Participants** – Willingness of participants being open to receive and exchange information in confidence.
- ✓ **Facilitator** – An impartial person with knowledge to coordinate and facilitate meetings.
- ✓ **Protocols** – Rules for the group to ensure fairness and a respectful learning environment.

Examples Information Exchanges

Create what works best for the membership and its culture. Beta test the process, evaluate, make adjustments and then protect the process as an exclusive benefit.

Twenty Groups – Many industries offer them. The National Association of Independent Automobile Dealers describes the groups as a flagship benefit. What makes them unique is the willingness of the same persons on a regular basis to spend a day plus travel to share private information (for example hiring, budgeting, operations). The results can be improvements in profitability and application of best practices.

Benchmarking Groups – Wikipedia describes this as a group willing to compare their own business processes and performance against industry metrics. Typically the association is the originator of the benchmarking research and data with a facilitator to guide conversations.

Peer Groups – Described as a group of similar job positions from different companies coming together to share challenges and solutions. For example, the marketing managers of various companies forming a bond to improve operations. Meeting usually starts with a speaker to generate thoughts, followed by facilitation, deep-dives and sharing.

Circle of Trust – The Circle of Trust is a program at the Kentucky Society of CPAs. It focuses on small firm and sole practitioners who receive an invitation to participate. They come from geographic distances to reduce the possibility of competitive conflicts. The purpose is to share information, help each other solve problems and be a source of additional expertise, that they may not be able to offer their own clients. For example, one may have a designation in business valuations, and another may have expertise in technology) There is a charge to participate. Penny Gold, CEO at the Kentucky Society of CPAs said, "We want to offer a forum where members can speak freely, in a safe and confidential environment."

Audit Process – Applying the knowledge by visiting a business or practice with a qualified expert to perform on audit in areas such as compliance, safety or profitability. For instance, audits could include regulatory compliance, safety or best practices.

Peer Review – The American Institute of Certified Public Accountants requires its member firms to undergo a peer review every three years. A peer review is a periodic external review of a firm's quality control system in accounting and auditing and is also known as the AICPA's practice monitoring program. At the invitation of a participant, two or more qualified persons visit the setting to review and discuss methods for compliance and improvement. ASAE used to have a similar service where a team of seasoned executives would be invited to visit and evaluate an association.

Solutions Group – The purpose is to identify a specific challenge and engage a group to develop creative solutions. Naturally those in the group benefit first, though the content becomes new benefits developed and delivered by the association. The group's topic most often is associated with the question, "What keeps you up at night?" or "What is the number one challenge in your work setting?"

Roundtables – Held on a regular basis, the roundtables invite persons from the same or similar job responsibilities to hear a speaker. The relationships can be lasting and the sharing continues between official meetings of the roundtable.

To summarize, an association is positioned to facilitate knowledge sharing and practical application. If the process is exclusive to members it can become a golden handcuff.

As a result of the information exchanges the association better understands the concerns and needs of members. In turn, new programs, articles and education can be developed.

Note: *Bob Harris, CAE, provides free governing tips and templates at www.nonprofitcenter.com*

funfest

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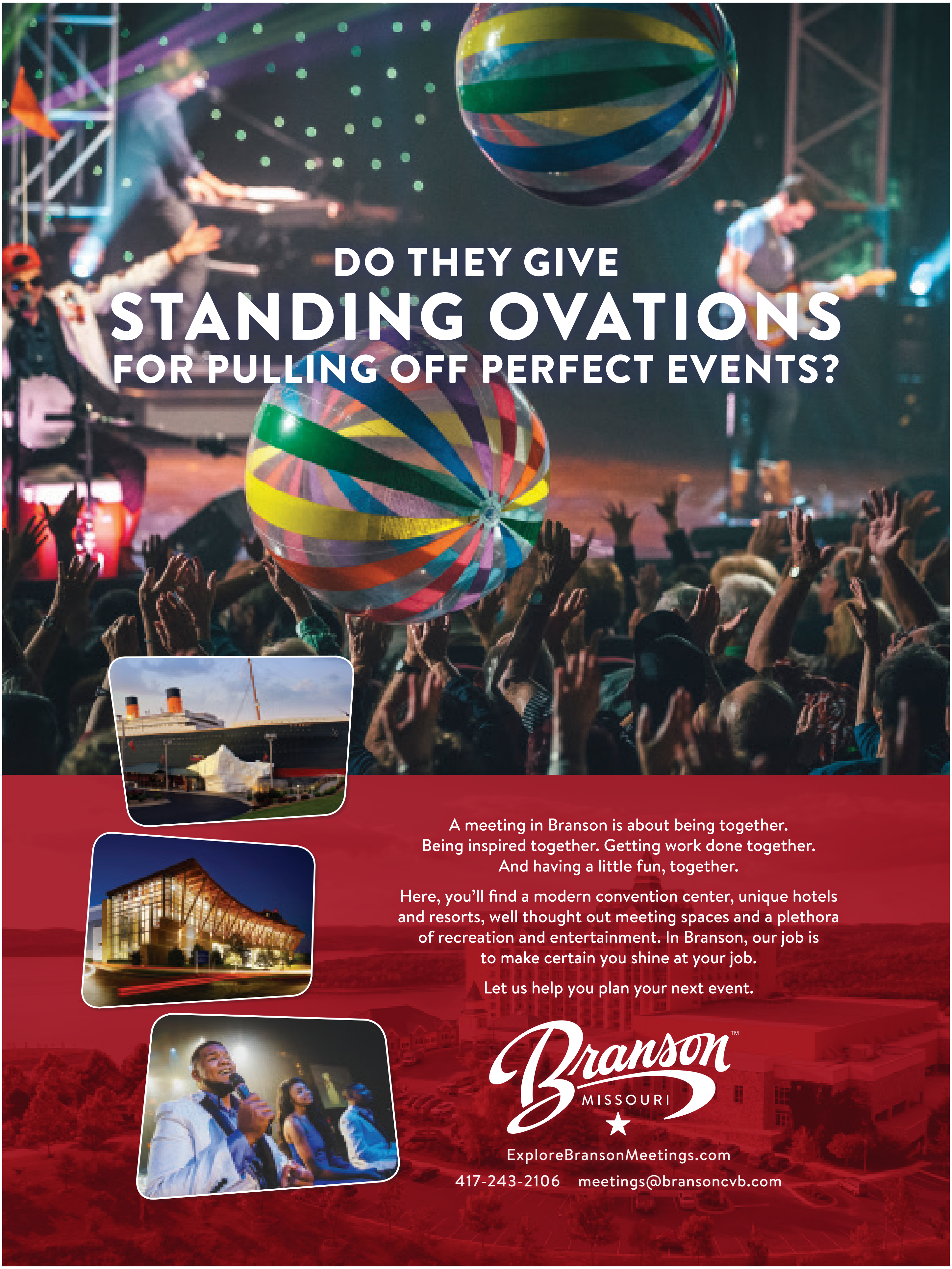
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7 Tips for Handling Toxic Employees

How to rein them in and create a better work environment

By Douglas W. Bush, Reprinted from *Smart Meetings*, July 2017

Have you ever worked with someone who left you feeling anxious, frustrated, angry or fearful-even downright disrespected? This type of employee creates a negative work environment with threatening, intimidating or coercive behavior.

Toxic employees show a pervasive pattern of hostility, irrational beliefs and emotions. They may not be aware of the negative impact their behavior has on another person or group. Even when they are aware, they may not care. When provided with feedback, toxic employees are likely to react in a defensive or confrontational way. Often, they do both. They persecute others and then complain that they've been treated unfairly.

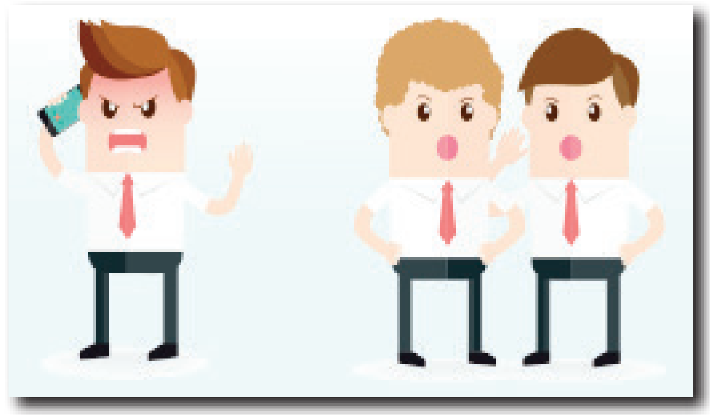
Peers, supervisors and even customers prefer to avoid toxic employees. Colleagues begin calling in sick. Individual and team performance suffers. Sometimes, a star performer leaves the organization. If ignored, toxic behavior becomes pervasive. Before long, the entire group is toxic.

How you handle toxic employees is one of the most important functions of managing the workplace. Fortunately, organizations can rein in toxic employees once they learn how to identify them.

Characteristics of a Toxic Employee

Toxic people frequently fail to recognize their own irrational thinking. Lack of self-awareness can lead to insensitivity toward others, which feeds more negative feelings.

Toxic employees often are fragile and insecure. They feel emotions first and then react, as opposed to thinking and then taking rational actions to solve business problems in a mature fashion. When confronted, they typically play the victim or overcompensate with arrogant, haughty behavior. These employees typically demonstrate a lack of respect for authority. They ignore rules as a way to assume power and gain control. They take all the credit when things are going well, but point fingers at others when mistakes occur.



Some traits of a toxic employee are:

- Reckless or careless, creating excitement or chaos regardless of risks
- Overly dramatic and combative; exhibiting exaggerated emotions
- Can be deceitful and manipulative, showing insensitivity toward others
- May have a sense of entitlement, acting boastful and pretentious, or aloof
- Frequently holds grudges and retaliates against perceived enemies

Toxic employees usually have difficulty working in teams. They tend to intimidate or bully others. They're overly competitive and may even sabotage the work of others.

How to Handle Toxic Employees

These seven steps can stop toxic employees in their tracks.

1. Set Clear Behavioral Expectations When dealing with a toxic employee, it is critical to establish and state very clearly what your expectations are for appropriate and acceptable behavior. It's estimated that 50 percent of an employee's work performance is based upon their accomplishments; the other 50 percent is based upon the behaviors they display to achieve positive results.

2. Model the Behaviors You Expect to See
When interacting with toxic employees, display the behaviors you would like them to emulate. When you see positive changes, acknowledge them. When you know the new behavior has become consistent, show recognition by giving special assignments and positive performance reviews.

3. Set Boundaries and Limits
As we build a trusting relationship with people, we allow them closer into the imaginary circles or rings around us. It is vital that toxic employees learn to recognize these imaginary boundaries. If their behaviors change, over time they will build trust with colleagues and managers.

4. Assert Yourself
When interacting with toxic employees, you have a right to assert yourself by expressing what you need and expect from them. You have a right to speak firmly, or even forcefully-but not in a way they would perceive as aggressive-to make your point about what you need from them.

5. Build Support Networks
Toxic employees can make you feel mentally, emotionally and physically drained. It's important to have listeners that you can confide in for support. They need to be good listeners and may have experienced the same emotions you're dealing with as a result of having toxic employees.

6. Provide Actionable Feedback
As a manager, you will need to be consistent in documenting all critical incidents and specific behaviors of toxic employees. When providing feedback, be specific and helpful. Detail, verbally and in writing, the behavior you want them to change. Explain why it's important to the team and the organization.

7. Re-evaluate the Relationship
When you know you've done all you can to reasonably help toxic employees change their behavior, it may be time to take appropriate action. It is important to understand the potential risk of keeping toxic employees on staff, versus letting them go-sooner, rather than later.

Douglas W. Bush *has an M.A. degree in industrial/organizational psychology from University of West Florida. He has 30 years of experience as an organizational development consultant, and is a member of International Society of Organization Development, American Counseling Association and American Psychological Association's Society of Industrial/Organizational Psychology.*

7 Tips for Taking Time Away from Busyness

Why you need to Consistently reboot, unplug and regenerate

By Steve Sisgold, Reprinted from *Smart Meetings*, April 2017

Boy, have we gotten busy. Our reasons for being "on" most of the time might include economic pressure, a need to stay connected socially, or even having a creative idea that just has to be shared with as many people as possible.

Fair enough. These are all good reasons to stay busy. Yet, with tech companies inventing wonderful new tools that have become soft addictions for many of us, it's getting harder to put down our cellphones, iPads and laptops to take much-needed breaks from our busyness.

With the ability to access our smart tools 24/7, many of us forget to balance work and social media time with our personal off line time for exercise, family, spiritual practices or just plain fun.

Can I Hit Pause?

People find they are staying connected to their screens, thinking about work, and stressing over past and future events, even at home or on vacation. I lived on Maui for five years and I saw it everywhere, from mad texting going on at poolside at luxury resorts to serious cellphone conversations on a trail in the Bamboo Forest.

It's hard to unplug. So even on vacation, many people are overstimulating their brains and disconnecting-from their bodies and the important people around them.

So what can we do? Make mind-body balance a new essential daily habit.

Steps for a More Min-Body Balanced Life

Just as we unplug and reboot our smart tools when they freeze or act lethargic, we need to reboot ourselves regularly. When you unplug and regenerate consistently, your brain gets to relax and your decisions and life activities become more balanced. Here are seven helpful tips.

Take time out: Take some dedicated time each week to unplug and examine your work/life/online scale. Schedule an appointment with yourself as the CEO of your life to make a plan to assess your activities to see if they are balanced to your satisfaction.

Map your priorities: List what is a priority to you in key areas of your life. From your health, career and relationships to relaxation, fun and personal growth, put your priorities on your calendar first. Having your priorities and desires clearly mapped out in this way greatly assists you to stay balanced and move in the direction you really want.

Keep agreements with yourself: This is essential. It is key to giving you a rock-solid foundation from which to create the balanced life you desire. If you keep 50 percent of your agreements, you will get 50 percent results.

Mind your body: Listen to your body when making decisions. If your body says "no" to a busy project, listen. When your body lines up with your perfect life plan, it becomes a reliable barometer that can remind you to make choices in every moment that will give you energy and the balanced life you seek.

Take command of your devices: Stay connected to your body while using smart tools. Keep your head up and don't lean in to your devices. Have them adjust to you, instead of you adjusting to them. Poor posture-like when you stare down at your phone for hours straight—can cause neck pain and cut off oxygen to your brain. You then spend more time healing ailments than doing what you truly desire to do.

Remember to stretch: Take hourly stretch breaks. Stretch your neck up and down and sideways, especially when you are using smart tools. Get up and shake out any tension or stiffness to create more body-mind balance.

(continued on next page)

"Which Leadership Style Will You Emulate"

By Lt.Col. Danny White, USMC (Ret.)

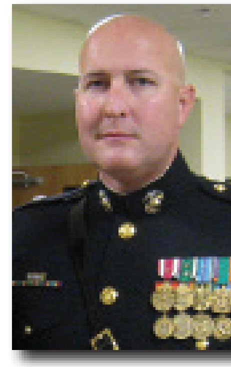
In an ancient book of wisdom, we read two stories about two kings and how their styles of leadership were revealed as each king ruled for 40 years. Closely studying these two leaders, it becomes evident that each led his kingdom differently—you could even say that each style is the polar opposite of the other one. If you go back to the first recorded details of their lives, you quickly see that each king's style of leadership was shaped by his occupation before assuming the throne.

The one who reigned first was what we today might call a muleskinner. Very likely this man carried a whip in his hand to drive his mules or donkeys. It's easy to imagine the "crack" of a whip in the air or against the hides of his animals. Clearly he saw that these animals were subject to him and expected them to carry his heavy loads or pull his wagons or pull his plows. The animals were to serve him. Studying his tenure as king, it's worthy to note that he treated his subjects the same way, particularly in the latter part of his 40-year tenure.

The other man was a shepherd before he became a king. And the contrast is striking. He carried a staff and led his flock from the front. He didn't drive his sheep. He served his sheep and put their needs before his own. His sheep didn't pull a wagon for him or carry his supplies in saddlebags. Rather he took care of them and was willing to die for them.

On one occasion, this shepherd heard one of his sheep in distress. He ran to the commotion and saw a lion dragging off one of his sheep. This shepherd bravely saved his sheep from the paw of the lion then turned and killed the lion. Then sometime later, he repeated a similar feat to save one of his sheep from a bear.

Clearly his herd of sheep knew that he wouldn't run when things got tough. He had earned his flock's trust. They knew that he loved them. The sheep felt safe with him. They would follow his lead by listening to his voice. No whip cracking or as some have called "leadership by intimidation."



When this king assumed the throne, it's clear that his subjects loved him. He continued to demonstrate having the heart of shepherd even after becoming king.

Fast forward in time to two different men, whose leadership styles others have studied and chosen to emulate. One was Niccolò Machiavelli. Care to guess which of the two historical examples he emulated. Just one of his quotes provides the clue: *"If you have to make a choice, to be feared is much safer than to be loved. For it is a good general rule about men, that they are ungrateful, fickle, liars and deceivers, fearful of danger and greedy for gain."*

The other was Ignatius Loyola. He developed a leadership philosophy, which called for his followers to demonstrate love for those they led. Not an attitude of superiority toward those they led. Rather, they looked for the potential in others and helped them unlock that potential.

Having seen many Machiavelli types (or whip crackers) I've recognized I don't want to be that way when given the opportunity to lead. Rather, I intend to continue to cultivate the Loyola style (or shepherd style) that puts those I'm privileged to lead first and myself second.

What about you? Have you ever considered these two styles and compared your own methods to them? Likely those you lead would appreciate it if you did—particularly as you become more like a shepherd leader.

Endnote: Danny White is a proud associate member of MSAE. After transitioning from the Marine Corps in 2012, he founded Lead with Liberty (www.leadwithliberty.com)—a leadership speaking/consulting/mentoring business—to share leadership lessons learned as a Marine, husband, and father. In 2014, he published *A Widower's Walk: From Desert to Destiny*.

Test your balance: Take a body-mind balance assessment test. The Whole Body Intelligence Assessment is one option, and you can access it at dilogr.com/app1/s/3ee555015191992. You will receive specific written and audio tips and solutions based on your responses. And you'll be on your way to achieving more body-mind balance in your life and work.

Steve Sisgold *has appeared on radio and TV, including on the PBS network, Oprah and Monte, and written for Psychology Today. He holds an M.A. in marketing, a B.S. in business and a certification in body-centered psychotherapy. His book, What's Your Body Telling You?, from McGraw-Hill, was No. 1 on Amazon.com in several categories. His most recent book, Whole Body Intelligence, launched as the No. 1 Hot New Release on Amazon. Visit his website at wholebodyintelligence.com.*

Missouri Update:
PAC's, CAMPAIGNS AND **DARK MONEY**

By Chuck Hatfield and John Munich

PACS, CAMPAIGNS AND DARK MONEY: WHAT IS THE LAW?

Charles W. Hatfield

John R. Munich

In 2016, Missouri voters enshrined new campaign finance laws in the state constitution. The Missouri Ethics Commission issued several interpreting opinions and a federal court has enjoined parts of the law as unconstitutional. At the same time, the Missouri legislature was debating laws to require disclosures to prohibit "dark money." All of this has resulted in some confusion among the political contributing and fundraising community. Following is a brief explanation of issues to consider when it comes to Missouri campaign finance.

When forming any political organization in Missouri, there are three bodies of law to consider:

- Missouri corporate formation laws,
- Missouri campaign finance laws, and
- Federal tax law.

These issues are regularly confused, but when considered in three distinct buckets the analysis is fairly straightforward. Every political organization should ask itself the following three questions.

1. What is my organization for purposes of Missouri corporate law?

Every business in Missouri falls into some legal category. If no specific decision is made, businesses are "sole proprietorships" or "unincorporated associations" or "partnerships." Not deciding to choose a business form means there is no legal distinction between the business and those running it. Therefore, the individuals involved can be found personally liable for acts of the business (contracts, injuries, etc…). Any political entity should consider incorporating as a Missouri not-for-profit corporation. Doing so does not resolve the entity's tax status (see below) but simply provides a corporate form for purposes of liability. Incorporating is a simple process of filing documents with the Missouri Secretary of State. A not-for-profit corporation needs articles of incorporation, by-laws and a board of at least three persons.

2. What is my organization for purposes of Missouri campaign finance law?

Missouri campaign finance law applies to any organization involved in advocating for the election or defeat of candidates for office or ballot measures. If the entity is not engaged in such advocacy, i.e. it only "educates" voters on issues without asking them to vote for a specific candidate or measure, it is not subject to campaign finance laws. For example, entities that solely run ads urging voters to "call Senator X and thank her for supporting law enforcement" or "call Senator Y and tell him to quit playing games with our children's education" are not subject to Missouri campaign finance laws and are not subject to limits or reporting requirements.

However, entities that engage in advocacy for the election of candidates or ballot measures are subject to Missouri campaign finance law, including the new constitutional amendment. There are three types of election committees under Missouri campaign finance law – a candidate committee, a Political Action Committee, and a campaign committee.

- ***A Candidate Committee*** is an entity formed and controlled by a particular candidate such as a candidate for Governor, State Senate or mayor. No candidate committee may accept corporate contributions. Candidate committees supporting state candidates are subject to contribution limits, while candidates for local office are not subject to limits. Candidate committees may not contribute to other candidates or to political action committees. They must file regular reports with the Missouri Ethics Commission.

- ***A Political Action Committee*** (also known as a continuing committee) supports or opposes candidates for office and may also support or oppose ballot measures, but they cannot be formed or directed by a candidate. PACs may accept unlimited contributions from most sources. Recent litigation in federal court focused mainly on the law governing PACs so there are still some unresolved issues, but as a general rule PACs may accept corporate contributions so long as the PAC does not operate as a "pass-through" for a corporation and so long as those corporations are authorized to do business in Missouri. PACs may contribute to candidates (subject to limits), may make "independent expenditures" urging support of candidates, and may support ballot measures either directly or by making contributions to campaign committees.

- ***A Campaign Committee*** is formed and operated solely for the purpose of supporting or opposing ballot measures. It does not support any candidate for office. Campaign committees are generally not subject to any limitations on the funds they may raise or expend in support of or opposition to their ballot measure(s).

3. What is my organization for purposes of federal tax law?

Federal law requires taxes on business income unless the entity is tax-exempt. Political entities normally fall into one of two exemptions.

- **Section 527 exemptions.** Candidate committees and PACs are generally tax-exempt under section 527 of the IRS code. They must file an initial notice (Form 8871) with the IRS and must file an income tax return (form 1120-POL). An organization filing under 527 will be taxed on its investment income but not on normal political contributions.

- **Section 501(c)(4) exemptions.** Campaign (ballot measure) committees do not qualify for section 527 exemption because they are not involved in attempting to influence the election of an individual to office. Instead, campaign committees can be tax-exempt under other sections of the IRS code, most likely section 501(c)(4), which applies to entities that engage in social welfare including educating the public on policy issues and lobbying. Supporting a ballot measure is considered lobbying because it is simply another method of convincing an authorized body (in this case the voters) to adopt a law. Similarly, entities that engage in political activity that does not specifically urge voters to vote for or against a candidate are likely tax-exempt under section 501(c)(4).

Entities claiming 501(c)(4) exemptions must apply for that status with the IRS. If tax-exempt status is granted, it is retroactive to the time the entity was formed. 501(c)(4) entities must file disclosure forms (990's) with the IRS. These forms disclose high level information about the organization, but the contributors are not required to be made public by the IRS. Recent discussions about "dark money" have to do with the fact that the IRS does not require these disclosures, but if a 501(c)(4) entity is in fact advocating for candidates or ballot measures it might still be subject to Missouri campaign finance law as discussed above.

All three bodies of law – corporate law, campaign finance law and the Federal tax code – must be considered when engaged in political activity. Qualifying your entity as a PAC under Missouri campaign finance law does not resolve the question of its corporate status or its tax status. Similarly, organizing an entity as tax-exempt under section 501(c)(4) of the IRS code does not resolve how the entity will be treated for purposes of Missouri campaign finance law.

Mr. Hatfield and Mr. Munich are partners at the Stinson Leonard Street, LLP law firm. Mr. Hatfield is chair of the Government Solutions Practice Group and has successfully litigated several campaign finance law cases. Mr. Munich is chair of the Business Litigation Practice Group and former Vice-Chairman of the Missouri Ethics Commission.

7 Categories including 23 Trends for Planning your Strategic Process

By Jim Anderson, CAE, President & CEO of CalSAE

The following seven categories include 23 trend areas identified and researched by CalSAE.
The information was used as part of a strategic planning process at its Volunteer Leadership Retreat on May 3 and 4, 2017. A more detailed summary report outlining each trend category (around two pages each) is available on CalSAE's website.

Macro – The Economy

1. The National Economy is sound but some federal policies being advocated may create a recession, and Medicare is a long term-threat.
2. The California Economy is sound but lack of housing will increase prices and cost of living.
3. Economy: Technology is a bigger threat to jobs than China or Mexico.
4. Economy: Mergers are not harming competition but they are having a somewhat increasingly negative impact on association membership.

Macro – Technology

5. Technology: Artificial Intelligence will dramatically expand and have massive influence on cognitive based jobs.
6. Technology: Mobile Robotics will expand dramatically and have massive influence on physical based jobs.
7. Technology: The Web & Technological Forces will increase in virtually every respect and change aspects of socializing, the economy, learning, sharing information, experiences, etc.

Macro – Social/Generational

8. Social: Demographics – Millennials will be 50% of the workforce by 2020 and are more diverse, tech savvy and impatient.
9. Social: Leadership – Millennials blend work and personal lives more than prior generations.
10. Social: Business – Younger adults have greater expectations and feel entitled to customization and full engagement as customers and employees (but they aren't necessarily getting that).
11. Social: Volunteerism is as important as ever, but it needs to be more flexible while "doing good" and building skills.
12. Social: Networking continues as a vital service of associations with greater expectations that the connections will bring value (coaching) and be flexible (online, personal + professional).

Associations – General

13. Societies of Association Executives Revenue is not keeping up with inflation while the Staff Size of Associations overall has been growing recently.
14. Association Communications – It is increasingly difficult for associations to communicate effectively with members and potential members.

Associations – Learning

15. Continuous Learning – Episodic, on-demand, mobile and reinforced learning are growing.
16. Virtual Learning is offered at some level by the vast majority of associations and competition has become intense from for-profit companies.
17. Intentional Content Design is a newer trend blending collaborative strategies and protractive program design based on member challenges.
18. Competency Based Education is growing in which attendees are able to demonstrate or verify the skills or learning they have experienced.

Associations – Membership

19. Association Membership – A slight majority of associations have increased membership in the last five years, but there are large pockets that are decreasing or staying even.
20. Membership: Society of Association Executives Group Pricing Models have had positive results in growing membership by about 5-6% annually.

Associations – Meetings

21. Meetings: The Experience of attendees is becoming much more important and in-demand…with a focus on personalization using a holistic approach.
22. Meetings: The Market - While associations intend to increase meetings overall, the expenses are levelling off after years of dramatic increases.
23. Meetings: Technology – Artificial Intelligence will have increased influence in personal experiences (matched networking) and the use of virtual reality/augmentation will be used in marketing events.

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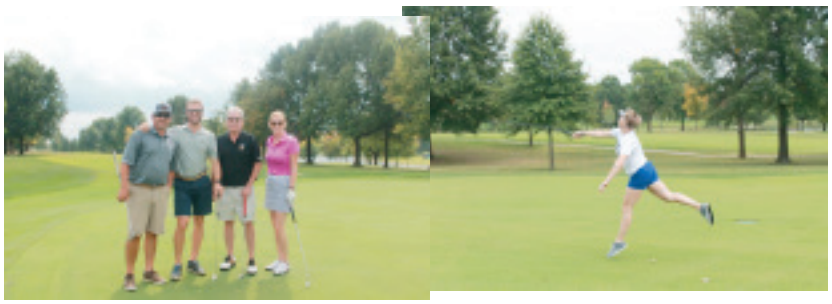
Scenes from the 2017 MSAE Funfest



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