CAE 300 Association Operations Support

Instructor   As assigned   **Phone**

Office   Virtual   **E-mail**

Office Hours As needed

Required Books:

1. Pealow, J. & Humphrey, S. L. (2013). *Canadian Association Management*. Toronto, Canada: Canadian Society of Association Executives, 2nd Edition.

Description:

CAE 300 provides the association manager with key insight into several critical operational areas. It begins with a lesson on human resource management and ties in such diverse areas as systems, technology, accounting and communications. The course concludes with a lesson on continuous improvement.

Objectives:

Upon completion of Human Resource Management, students will be able to:

- understand the relationship between human resource management and strategic planning and management processes;
- understand that human resources concepts can and should be applied equally to paid staff *and* volunteers;
- discuss the challenges of managing a changing and diverse work force and understand the implications to association management practices;
- assess the levels of effectiveness of the association's human resource management practices through benchmarking;
- understand a variety of performance appraisal systems and be able to adapt it for use within an association;
- understand the importance of documentation, and assess the association's human resource record-keeping; and
- understand the concepts of competency-based performance appraisal systems.

Upon completion of Associations Systems and Practices, students will be able to:

- understand various operating systems and practices used to keep track of members' needs and information;
- identify the key factors in establishing an effective information management system;
- understand the interrelationship among various systems and how they will impact overall association operations;
- understand the limitations and advantages of a multifaceted communication system;

- understand the impact of technology on various operating systems and practices;
- understand the steps in continuous improvement and quality control for various operating systems; and
- determine the effectiveness of operations by asking key questions.

Upon completion of Technology, students will be able to:

- use current technology to complete work and make informed decisions;
- discuss today's technological advantages in reference to your association;
- understand the importance of the association manager's role in making technology work for the association;
- know the basic technological terminology and software tools;
- know the importance of keeping current; know the common "dos" and "don'ts"; and
- evaluate the use of technology and, through benchmarking, identify opportunities for improvement.

Upon completion of Financial and Management Accounting, students will be able to:

- understand the role and importance of financial and management accounting for an association;
- consider the impact on financial resources when making decisions;
- evaluate financial and management accounting efforts, and identify opportunities for improvement;
- describe the difference between financial and management accounting;
- discuss the nature of the association manager's role with respect to both financial and management accounting;
- know the eight association financial accountability requirements;
- know the three principal financial statements required;
- use accounting information to guide management decision-making;
- understand the importance of the budget; and
- understand the importance of having sound investment and reserves policies.

Upon completion of Facilities and Equipment, students will be able to:

- understand successful practices for acquisition and application of facilities and equipment
- manage assigned assets efficiently and effectively;
- evaluate practices for facilities and equipment, and identify opportunities for improvement;
- discuss the factors to consider when looking for new facilities;
- understand the importance of having a facilities and equipment plan that coincides with the association's long-range plan;
- understand how the association can save money through different practices of acquiring and using facilities, equipment and services; and
- identify opportunities to improve facilities and equipment.

Upon completion of Legal and Statutory, students will be able to:

- understand laws affecting association operations;
- identify the legal distinctions between incorporated and unincorporated bodies;
- identify the legal requirements for incorporation of an association;
- distinguish between registration as a charity and not-for-profit association;
- construct and administer legal contracts on behalf of the association;
- discuss the legal considerations related to statutory law that regulates associations;
- recognize legal issues as they emerge and determine when a legal opinion is required; and
- establish policies and procedures to ensure the association is in compliance with all legal regulations and statutes.

Upon completion of Insurance and Tax, students will be able to:

- understand the principles of risk management;
- distinguish between various types of insurance policies;
- assess insurance and tax requirements for associations; and
- understand the legal requirements of insurance and taxes.

Upon completion of Communications and External Relations, students will be able to:

- identify the key elements of an effective communication strategy;
- develop a communication plan for your association; and
- understand the key points of a public relations strategy and be able to distinguish between various communication tools.

Upon completion of Continuous Improvement, students will be able to:

- understand the impact of innovation and creativity in implementing continuous improvement solutions;
- understand what tools are available to assist in these efforts;
- seek out innovative approaches and adapt them to use within your association; and
- evaluate established services and programs in the context of continuous improvement.

Assignments and Participation

This course takes place over a 12 week time frame- with several weeks allotted specifically so students may work on their mid-term and final projects.

On a weekly basis students are students are expected to review the course materials, readings, videos, audio recordings, and to participate in discussion board forums. Students may work ahead to read future weeks and draft initial discussion board posts, but must be active in the current weeks discussion in order to receive participation points. Deadlines for discussion forums are specific to each course-please check the deadlines document provided in the Introduction area.

Each week contains two discussion questions, please respond to both questions as well as two of your colleagues' posts in each forum.   Each week also contains a required Research Activity, a Knowledge Check

quiz and reading materials. This course has two main assignments- a mid-term and a final project. Students are given weeks within the course in which they are not required to complete readings or participate in discussion forums. Final assignments may be submitted at any point during weeks ten, eleven or twelve.

Resources

Course Materials: All required course material is included within the course via pdf or external URL. If at any point, a broken link occurs or information is missing, please contact cae@csae.com immediately.

Writing Centre: The Writing Centre contains resources on writing, writing mechanics, report construction, reference citation as well as templates for student use. If the Writing Centre does not cover a topic, template, or resource material that is needed, please send a request to cae@csae.com.

Resource Centre: The Resource Centre contains information on CSAE policies, online learning, time management and other topics to help support students progression through the program. Need additional resources? Contact cae@case.com.

Deadlines: Deadlines should be followed, unless pre-arranged with the instructor. Discussion board forum participation is limited to the present week and absences must be discussed with the instructor.

Policies

Students are expected to review the Student Handbook and adhere to academic and operational policies. Question about a policy? Contact cae@case.com.

Plagiarism: CSAE requires that all non-original work be accompanied by an appropriate citation or attribution to the author. Students are permitted to reference original ideas utilized in prior assignments, however this does not include cutting and pasting or using previously submitted work verbatim. CSAE takes plagiarism very seriously and reserves the right to permanently expel any student who is found to have plagiarized.

Discussion Board Etiquette: Students are expected to be respectful of each other and refrain from any inflammatory, aggressive or derogatory remarks or comments. As well as any behaviour which is harassing in nature. CSAE takes a safe and healthy learning environment seriously and right to permanently expel any student who is found to have engaged in harassment or disrespectful behaviour.

Evaluation:

The passing grade for this course is 60%.

Evaluation is comprised of four components:

1. Participation - 20%
2. Quizzes – 15%
3. Mid-Term - 30%
4. Final - 35%

Participation

One of the key aspects of the CAE® program is the enhanced level of learning that results from student interaction within the system. By sharing ideas, experiences, and thoughts relative to the material being presented, students will find their learning more effective and interesting. If you wish to receive top marks for participation it will be necessary to complete all of the discussion activities; ensuring that responses are thorough, and for each discussion activity ask questions, challenge, offer different perspectives, etc.

Assignments

1. **Mechanics:** The completed assignments should meet the following criteria; See the Writing Centre for a report template.

   - Include a title page identifying your name, the course, assignment number, and topic.
   - Pages should be single-spaced.
   - Regular type should not exceed a 12-point font or be less than 9-point.
   - Use a common font such as Times, Arial, etc.
   - Number pages and use a one-column page format.
   - Use endnotes or a bibliography at the end of the assignment instead of footnotes.
   - Save and upload your assignment to Moodle using your last name, the number of the course and your assignment. For example, Johnson100-1. Please note that single file upload size is limited to 1MB. If your assignment is above this limit, save as separate files. You may upload 5 files for each assignment. If you encounter difficulties, email the assignment to cae@csae.com before the due date.
   - Complete the assignment using Microsoft Word or something compatible.
   - When including appendices, embed them into your assignment file.

2. **Reports:** Your assignment submissions should be of board submission quality. Before submitting assignments, ask yourself if you would feel comfortable submitting to your Board. The Writing Centre contains tips, templates, and resources on the mechanics of reports, how to use APA or MLA citations and writing. If you need additional assistance with writing, there are links to external resources and tutors available for hire.

   Mid-Term 30%

   Conduct an assessment of the association's human resources policies and practices. Report to the board on their effectiveness. Identify areas for improvement, and provide specific recommendations for change along with information to support implementation.

   This report should be between 2,000-3,000 words or 5-7.5 pages- not including supporting documents.

   Final 35%

   The final assignment requires benchmarking, which will require students to work with several partner organizations. It is recommended that students seek out partnerships and have three (required)

secured by the third week of the course. Students may choose to work with up to five partner organizations. The final report should be between 3,000-5,000 words or 7.5-12.5 pages- not including supporting documents.

If you have not yet taken CAE 200, review Tools and Techniques for Effective Benchmarking before beginning your assignment and contact your instructor with any questions.

Take a continuous improvement approach to either technology or communications and external relations for your association.

1. If you **do have** a formal technology or communications and external relations plan, conduct a benchmarking project to seek out standards and best practices with a view to making improvements. Report to the board on your process, research, findings, analysis and recommendations and provide a revised plan that includes the recommendations.

2. If you **do not have** a formal technology or communications and external relations plan, engage in a benchmarking project to assist in the development of a plan for your association. Report to the board on your benchmarking project and provide a technology or communications and external relations plan to your board for consideration.

Course Schedule:

Week	Topic	Required Reading
One	Human Resource Management	See Course
Two	Associations Systems & Practices	See Course
Three	Technology	See Course
Four	Financial Management & Accounting	See Course
Five	Mid-Term Assignment	N/A
Six	Facilities & Equipment	See Course
Seven	Legal & Statutory	See Course
Eight	Insurance & Tax	See Course
Nine	Communications & External Relations	See Course
Ten	Continuous Improvement	See Course
Eleven	Final Assignment	N/A
Twelve	Final Assignment	N/A