

ISAE Knowledge Broker Resource Subject Areas

Administration

- Affinity policies and agreements
- Bylaws
- Contract models -- with speakers, independent contractors, trade shows
- Copyright agreements/release forms
- Organization charts
- Opt-out and unsubscribe statements for faxes and emails
- Policies and procedures manuals/documents
 - Policy manuals
 - Policies for
 - Conflict of Interest
 - Reserve & Investment
- Record retention schedules/management

Board of Directors

- Bylaws
- Codes of Conduct
- Conflict of Interest Policies
- Financial reporting format for board of directors
- Policies and procedures manuals/documents
 - Policy manuals
 - Policies for:
 - Conflict of Interest
 - Reserve & Investment
- Board self assessment tool
- Orientation materials
- Whistleblower policies

Human Resources

- Employee personnel policies/manuals
 - Set of personnel policies
 - Policies for:
 - Telecommuting
 - Business casual dress attire
 - Customer Services guidelines
- Employee evaluation forms
- Employee performance standards
- Other HR forms
- Job descriptions

Marketing and Communications

- Brochures (conference, membership, etc.) – membership, foundation giving
- Communication plans
- Marketing plans
- Opt-out and unsubscribe statements for faxes and emails

Membership

- Applications
- Brochures (recruitment, new member information, etc.)
- Recruitment letters
- Retention plans & materials
- Exit Interviews
- Membership Plans

Organizational Planning

- Business plans
- Communication plans
- Disaster Plans
- Marketing plans
- Membership Plans
- Strategic plans

Foundations

- How to form one and copies of docs
 - Brochure on foundation giving
- Fundraising letters

Your Speaker Suggestions