

Create a Disaster Survival Notebook

By Bob Harris, CAE

Nobody thought the warning of a flash flood would impact the association office. Usually that "happens to somebody else." Flash floods would slow the drive home...but certainly not destroy our office!

Disasters occur every day – whether it is a flood, fire, hurricane, computer theft, tornado, broken water pipe or other natural disaster.

At the Mountain States Lumber and Building Material Dealers Association, the executive director advises board and staff of her system to be prepared in case of a disaster. She created the Disaster Survival Notebook.

Imagine that a fire swept through your office and you had to replace or recreate the most critical association documents. The staff knows to grab the notebook from the shelf if disaster is imminent. The CEO keeps a copy of the notebook at her home and also asks the CPA to store a copy.

The notebook contains copies of important governing and management documents:

- IRS Information Returns for 3 Years (a.k.a. Form 990)*
- IRS Letter of Determination
- Current Financial Report
- Articles of Incorporation
- Bylaws
- Sales Tax License and/or Exemption
- Current Rosters of Board and Staff
- Policy Manual
- Insurance Policies
- Back Up Disc to Computers
- Major Software Licenses
- List of Passwords

The notebook doubles as the resource for staff to respond to public record requests.

Bob Harris, CAE, advises association boards and staff on efficient management and governance. His Website offers tips and templates at www.nonprofitcenter.com