

TRANSITIONING TO AN AMC

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The decision to transition from an independent office to an experienced association management company (AMC) can be based on several factors. A good percentage of the time the decision is based on the Board of Director's fiduciary responsibility to the membership. The objective of a board is to offer members expanded services and to facilitate future growth in a cost-effective environment. Entering into a partnership with an experienced AMC can provide these elements.

Whether the decision to transfer management responsibilities to an AMC is because your current independent staff plans to retire, or the result of a long, thought out strategic plan, the first thing you must do is your homework. An AMC can offer a pool of skilled industry professionals whose goal is to provide the association with management expertise and specialized administrative services. Keep in mind that all AMCs are not equal. When considering a change of such magnitude, you need to be certain that the culture of the AMC matches that of the association.

You will need to consider the following types of questions as you research potential association management companies. Does the AMC's management philosophy focus on a partnership with the association? Does the AMC's philosophy center on a team approach to problem solving, planning and implementation? Has the AMC achieved professional association management accreditation? Before you begin a successful transition, you must feel confident that you have made the correct choice in a new long-term partnership for the association. Once the selection has been made and the contract has been signed, there are certain elements of the move that deserve special consideration in order to guarantee a smooth transition.

The ideal situation would be for the new AMC to work in tandem with your former management team. Experience has shown the best results occur when both parties can work together to ensure that the association's programs and services are transferred in an orderly fashion.

While the AMC will need to focus its initial efforts on a complete understanding of the day-to-day needs of the membership, the change in the organization's current management will also create an ideal opportunity for a full re-examination and re-evaluation of association activities and programs. Working together in the new partnership, association officers and your new dedicated staff will bring a fresh perspective on how to best accomplish your primary programs.

Solid preparation and adherence to a strict schedule will make the process run smoothly. Some AMCs have an extensive "New Association Transition Checklist" which can be forwarded to the new client. This crucial tool includes sections on vital areas of the association's daily operations such as financial documents, insurance policies, meetings, membership, graphics and artwork, paper and electronic files, inventory, and other transition specific activities. It details what should be sent from the previous management and will also help the new staff ask the right questions about the daily operations of the association. This should help to provide continuity for the association's board of directors, committees and members. From forwarding the mail to relocating assets, your new AMC should work closely with the board and designated members to execute a seamless transition.

One other very effective communication tool is to formally introduce the new headquarters staff to the membership via a letter from the association president. That could be followed by a "spotlight" article in the association's newsletter.

Once the physical transition has taken place, it is just as important to dedicate time and effort to ensuring that your members are aware of the change in management and that they are confident that the transition has been made in the best interest of the organization. It may be necessary to schedule a visit to your new headquarters. A personal visit is an excellent way to begin to build the important foundation for what will ideally become a long-term mutually satisfying professional relationship.

The transition from an independent staff to a professional association management company will be smooth and orderly if these important key areas are made the focus of the transition process. The long-term benefits the association will realize through the new partnership will far outweigh the apprehension of making a transition.