



# Find Just the Right AMC to Meet Your Needs

*Eight steps to help you locate, evaluate, and select the perfect association management company to partner with your association for long-term growth and success.*

**By Donna Cameron, CAE**

Looking for an association management company to help your association move to a new level of success? These eight steps will help you find the AMC that's right for you and launch the relationship with energy and momentum.

## **1. Evaluate Your Current Situation**

Whether you're an emerging association looking for your first paid staff, an association looking for an alternative to its own office and direct staff, or already working with an AMC, take the time to honestly evaluate your circumstances. If you've never had staff and you've reached the point where your volunteers are focusing so much time on operations you're burning them out or they're failing to act strategically, it's an easy decision: You need help.

Perhaps your organization's goals are not being met. If you already have staff, whether direct employees or an AMC, look for ways to address the problem with them. This means examining what's not working to your expectations, talking candidly with current staff management, exploring ways to resolve problems, and assessing the barriers you perceive to be in the way of reaching your goals. Sometimes, the problems don't rest entirely with management; it may be board inefficiency, policies getting in the way of action, or—most likely—a combination of elements.

## 2. Be Open About Your Decision

If the situation cannot be resolved and you've decided to initiate the search for an AMC, tell your current staff or management. Don't start the search process without disclosure. If keeping the current staff is a possibility, tell them that. If you're already working with an AMC, give that company an opportunity to submit a bid. (You'll likely learn a lot about your organization from your

AMC's proposal.) If your AMC search may result in an office closing and dismissed employees, be fair to them and let them know of that possibility. Let them know, too, that the selected AMC might be very interested in hiring some of the previous staff.

While it may seem easier to keep current staff in the dark until a decision is made, secrets like this don't stay secret for very long. Treat your staff with the respect you would want.

## 3. Pull Together a Search Committee and Prepare Your RFP

Appoint a small taskforce of big-picture thinkers (three to seven members is a practical size), volunteer leaders with a commitment to the association and its members and without a personal agenda. This group will be your search committee.

Next, you need to prepare a request for proposals document. Before preparing the RFP, spend some time thinking about what you'd like to alter or do differently and how you can use this management change as an opportunity to

modify or even transform systems and operations. You can find lists of AMCs in this guide, on the ASAE & The Center for Association Leadership website ([www.asaecenter.org](http://www.asaecenter.org)), or through the AMC Institute ([www.amcinstitute.org](http://www.amcinstitute.org)). State or regional associations may also want to contact the society of association executives that serves their state for a list of local AMCs.

Preparing an RFP isn't as daunting as it might sound. The AMC Institute website offers an online option that guides you through the process and then sends the RFP to its members for you (<http://member.amcinstitute.org/select/rfp.cfm>). The form allows you to upload key documents that are essential to the process, including financial statements, bylaws, strategic plan, sample publications, and other collateral. You can specify in the RFP any factors that might be required, such as location, size, or AMC accreditation. (See sidebar on this page for additional resources.)

Don't withhold information or worry you're giving too much away. AMCs will keep your information confidential, and the more they know about you—budget, activities, strategic plan, desired capabilities, even problem areas—the better they can assess if they're the right fit for you and put together an accurate and realistic proposal. The time you invest preparing your RFP will save you time later, as you'll have a clearer picture of your needs—and only AMCs that can meet those needs are likely to submit.

Set a realistic date for proposal submission. Most AMCs put a lot of time and effort into preparing an RFP. Allow a minimum of 30 days, and if you have the time, give 45 or 60 days.

Be sure to name someone on the search committee as a contact for questions. If you've asked companies to send a letter of intent to submit a proposal, it's a courtesy to share the answers to any questions with all potential bidders. Many associations set a deadline for questions and share the answers with all candidates at a specified date (e.g., two weeks before bids are due).

### HELP FOR YOUR AMC SEARCH

There are plenty of resources available to organizations searching for an association management company. Here's a sampling:

#### From ASAE & The Center for Association Leadership ([www.asaecenter.org](http://www.asaecenter.org))

- ASAE & The Center's *Guide to AMCs*: [www.asaecenter.org/files/2009GuideToAssociationManagementCompanies.pdf](http://www.asaecenter.org/files/2009GuideToAssociationManagementCompanies.pdf)
- Background information collection tool for preparing an RFP: [www.asaecenter.org/files/filedownloads/association\\_background.pdf](http://www.asaecenter.org/files/filedownloads/association_background.pdf)
- Best professional practices for AMCs, including standards, contracts, financial management, transition, and more: [www.asaecenter.org/publications/resources/content.cfm?itemnumber=8127](http://www.asaecenter.org/publications/resources/content.cfm?itemnumber=8127)

#### From the AMC Institute ([www.amcinstitute.org](http://www.amcinstitute.org))

- Description of the AMC model and how it works: [www.amcinstitute.org/models/model.cfm](http://www.amcinstitute.org/models/model.cfm)
- Guide to the process of searching for an AMC to manage your association: <http://member.amcinstitute.org/select/management.cfm>
- Free online RFP tool to help you find an AMC: <http://member.amcinstitute.org/select/rfp.cfm>
- AMC-related resources for association and nonprofit leaders: [www.amcinstitute.org/resources/publications.cfm](http://www.amcinstitute.org/resources/publications.cfm)

#### 4. Prepare Evaluation Criteria

While the AMCs are developing bids, your search committee should be strategizing about how those bids will be evaluated. This should be fairly easy, as you've asked and answered these questions in the previous steps.

Here, you are documenting important qualifications you're looking for in new management. These might include technological sophistication, experience in planning meetings and conferences comparable to the size and scope of your own, experience with accreditation programs, a track record of helping associations grow or bringing them visibility, or a myriad of other factors. Your search committee can customize a list to your needs.

#### 5. Evaluate Proposals

Ask members of the search committee to evaluate every proposal you receive based on the established criteria. Grade

with several viable proposals, you'll probably want to reduce the number to a more manageable one.

This can be done through a variety of means. For example, you can send a message with additional questions to each company, giving them a week or so to respond. You can also arrange for telephone interviews with some or all of the search committee so you can "meet" your potential staff.

Again, use consistent criteria to evaluate each company. Based on the results of this step, narrow your field to no more than four finalists. Again, notify the companies you didn't select.

#### 7. Set Up Interviews With Finalists

Many associations send members of the search committee to conduct site visits and interviews with the finalists at their offices. This allows them to see the office and meet staffers who might be

between an association and an AMC is a partnership built on trust, communication, shared vision, and commitment to one another's long-term success. Interview with the goal of finding just the right company to be your partner today, tomorrow, and for many years to come.

#### 8. Negotiate the Contract and Prepare for Transition

Once you've made your selection, there may be details of the contract that need to be clarified or spelled out. Most AMCs have a standard service contract they can customize to your needs. Your new AMC can also work with you to set up a timetable to address the many details involved in making a smooth transition.

If you've followed these steps, you should be well on your way to building a lasting relationship that will fruitfully serve your organization, its members, and the trade, profession, or cause you

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each or assign point values, but also leave a little room for intuition and gut feelings. This process needs to be both objective and subjective. Remember, you are seeking a cultural fit as well as an administrative match.

During the process, narrow the proposals down to the few that most closely meet your desired criteria. Be sure to notify and thank those you decide not to have continue in the process.

#### 6. Screen Your Semifinalists

This step may not always be necessary. If the evaluation phase has identified two to four outstanding candidates, skip to step seven. But if you find yourself

working with them. Often, final interviews are set up in conjunction with a board meeting or association function.

Here's your opportunity to ask probing questions and allow the AMC to do the same with you. The goal here is to assess the fit and decide which company you think will be the best long-term partner for your organization. The AMC will be assessing you for compatibility as well.

By this time, you should have narrowed the field to two or three companies, each of which would likely meet your needs. So, ask situational questions and explore culture and personality affinity. A winning relationship

represent. This may be the most important action your board takes all year. Congratulate yourselves for a job well done! ■

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