

Chapter Administrator Hiring Process



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What is an Association Management Company (AMC)?

First, the chapter should determine if they are looking to hire a company or an individual to provide chapter administrative services. Below is a description of an Association Management Company.

What is an Association Management Company (AMC)?

Source: LoBue & Majdalany Management Group

An Association Management Company (AMC) is a professional service firm that provides leadership in association management and other services through experienced staff, proven practices, and shared resources.

When providing full service management, the AMC's offices serve as the Chapter's headquarters. AMCs also provide specialized services to associations that may not need full service management. AMCs bring economies of scale, buying power, flexibility and adaptability through executive leadership and professional, efficient management of programs and services, enabling productive use of association leaders' time.

Facts about the AMC industry⁽¹⁾:

- Numbers more than 670 AMCs globally
- Represents more than 4,600 associations
- Manages annual budgets exceeding \$3.4 billion
- Employs more than 7,600 professionals
- Manages nearly 23,000 association meetings each year

⁽¹⁾ *Information provided by: AMC Institute*

Benefits of AMC Model Backed by Evidence

Until a couple of years ago claims made about the benefits of the AMC model were supported by anecdotal comments, or not at all. L&M founder and principal Michael LoBue, CAE examined two independent operating ratio benchmark studies — one by the American Society of Association Executives (ASAE) for organizations that hire their own staff, lease their own offices and spend scarce revenue on capital goods and one by the AMC Institute for AMC-managed organizations.

Please visit this website for more information about the study: http://www.lm-mgmt.com/lm_website/research/research/AMC%20white%20paper%20web.pdf

Determining Chapters' Needs

If your chapter decides to consider hiring an AMC, the next step is to determine the needs of the chapter board and committees. Below are some questions to ask Chapter Leadership.

- 1) What demand do you anticipate for a Chapter Administrator to handle member inquiries/service requests and respond to requests?
- 2) What is the level of service required for the maintenance and update of computer records for boards and committees? (e.g. luncheon guests, NPD awardees and guests, etc.)
- 3) What is the level of service required for upkeep and maintenance of the chapter web site?
- 4) What is the demand for the creation and dissemination of communications pieces and promotional emails to members and/or others? Are these communications via email or through "regular" mail?
- 5) What level of service is required for staffing meetings and events - board, committee, monthly luncheon, NPD conferences, special events, etc. - and what are the specific tasks that need to be accomplished at these meetings and events?
- 6) What is the Chapter Administrator's role with respect to documents required by and communications to/from IHQ?
- 7) What is the level of service expected to fulfill the needs of membership functions, e.g. welcome of new members, lapsed follow-ups, etc.?
- 8) What financial and accounting duties should committees and/or the board require of the Chapter Administrator?
- 9) What is the reporting structure you feel will best meet the needs of the chapter and facilitate the success of the Chapter Administrator?

Sample Chapter Administrator Job Description

Based on the answers to the above questions, the Chapter Board can develop a Chapter Administrator Task List/Job Description. Below is a sample that can be tailored to your chapter.

GENERAL ADMINISTRATION

- Support the [CHAPTER] organizational identity with a headquarters office in [CITY, STATE/PROVINCE], including telephone, fax, e-mail address and professional staff. Office facilities to include access to a conference room, office furniture and equipment, computers and Microsoft Office Suite of software, printers, scanner, calculators, copier, video player, telephones, voice mail, two fax machines (inbound and outbound), daily file server backup, broadcast email capacity, mail-room equipment, and Internet connections needed within the context of this action plan.
- Provide a friendly and timely response to all telephone calls, faxes, email and routine correspondence from officers, members, prospects, corporations, suppliers, and others interested in the work of [CHAPTER], directing applicable inquiries, correspondence and messages to appropriate [CHAPTER] officers or committee chairs. Follow up on suggestions and complaints by passing information to the appropriate officer, director or committee chair when necessary. The office is open [DAYS AND TIMES] (i.e. weekdays from 8:30 a.m. to 5:00 p.m., (Eastern/Central/Mountain/Pacific) Standard Time, Monday through Thursday, and 8:30 a.m. to 4 p.m. on Friday. Fax, voice mail, and email are available 24 hours a day.) Provide a voice mail system, which includes an individual [CHAPTER] voice mailbox.
- Provide in-office files and storage for active files, forms, records and supplies used on a daily basis, such as stationery, working files, directories, and other publications, products, videos, etc. Historical records, extra publications and products, and large bulk items will be placed off-site in climate controlled on-site storage as necessary.
- Provide routine mailing and shipping operations, and supervise high-volume mailing and shipping services through an outside mail house. Provide routine photocopying services. Review current administrative activities with the [CHAPTER] president to ensure that all matters are being handled smoothly and efficiently. Provide the officers and directors with counsel on additional management activities to strengthen and expand the quality of services provided to [CHAPTER] members and the profession. Notify the [CHAPTER] president of inefficiencies in current management practices with alternative suggestions for improvement when appropriate. Arrange for consultation with legal counsel when necessary and as approved by [CHAPTER] leadership. Negotiate for printing, delivery, credit card fulfillment, e-commerce,

broadcast email, accounting, legal and other infrastructure services with our network of providers, securing the best quality and value for **[CHAPTER]**.

- Maintain working supplies inventory and a stock of **[CHAPTER]** letterhead, envelopes, business cards, stationery, brochures, etc. Arrange for mass printed material to be produced upon request, to be reviewed and approved by **[CHAPTER]** leadership.
- Maintain and update membership materials, process new membership applications according to **[CHAPTER]** procedures, and send out welcoming packets. Be sure that new members are recognized in the newsletter, and forward new member information to membership and/or newsletter chairs as directed. Send out renewal notices by either email or regular mail, according to **[CHAPTER]** procedures, and process as they are returned by members. Send additional dues reminders to delinquent members.
- Act as liaison between the chapter office and international headquarters. Insure that all reports required by headquarters are delivered on deadline, based on timeline and content provided by **[CHAPTER]** leadership.
- Track and keep records regarding scholarship activity.
- Communicate with the membership via email and regular mail as directed by **[CHAPTER]** leadership. Maintain a calendar of events, with appropriate links and deadlines.
- Collaborate with the membership chair to develop membership campaigns and retention programs, and to help develop a meaningful portfolio of membership benefits.
- Engage with the board and/or association's legal counsel should the need arise. Assist in making arrangements for insurance coverage for the association and officers' and directors' liability insurance if requested. Provide suggestions for financial and investment planning professionals upon request.
- Assist in nomination and election process for officers and directors as requested.
- Follow policies and procedures set down by the **[CHAPTER]** leadership in fulfilling its duties.

DATABASE MANAGEMENT

- Maintain the records and files of the society as directed. Communicate with international headquarters regarding membership list.
- Maintain lists for board of directors and committees, and other lists as needed.
- Provide membership reports for conference calls and board meetings.
- Provide requested reports to designated officers, directors and committee chairs.
- Protect the security of membership data and enforce board regulations regarding the sharing of membership information. Be sure that data is backed up weekly and stored off-site, per management company practice.

FINANCIAL/ACCOUNTING SERVICES

- Receive and promptly deposit funds paid to the association for member dues, programs, conference income, advertising and donations.

- Process requests for reimbursement after they have been presented to and approved by the board of directors.
- Maintain checking and savings accounts, journals and ledgers and all information pertaining to these accounts, recording all deposits and reconciling bank statements. Monitor and maintain information regarding any investments, and manage funds according to **[CHAPTER]** policies. Notify the treasurer of upcoming reinvestment dates.
- Keep general ledger according to **[CHAPTER]** budget line items. Pay invoices in a timely manner as directed by **[CHAPTER]** leadership.
- Process checks and credit card payments received, and follow up on bounced checks and credit card denials.
- Monitor any receivables and send out re-bill notices. Notify **[CHAPTER]** treasurer about past due receivables.
- Collect and report on income from dues, advertising, events and other revenue activities. Provide general financial reports and other information to leadership following **[CHAPTER]** events as requested.
- Assist treasurer in preparation of the annual budget as requested.
- Keep bank signature cards current.
- Assist treasurer or CPA retained in preparation of the annual audit and filing of annual IRS Form 990. Coordinate with **[CHAPTER]** leadership regarding IRS correspondence. Mail out W9 forms and 1099 forms as necessary.

WEBSITE

- Evaluate current service provider and organize a move to new server platform if necessary.
- Make recommendations for and implement a cost effective, efficient means of offering e-commerce for new membership applications/renewals and event registration.
- Work with board members to improve interactivity and provide more robust content.
- Recognize sponsors in a timely fashion on website.
- Create and post monthly newsletter on website 10 days prior to meeting date, based on timely receipt of materials from officers and committee chairs.
- Provide support to designated webmaster to maintain and update the **[CHAPTER]** website.
- Continually recommend Web site content and features.

BOARD AND COMMITTEE SUPPORT

- Maintain a current roster of officers and board members. Provide administrative assistance to officers, directors and committee chairs as requested. Schedule conference calls as needed. Provide board member notebook to incoming directors, content to be provided by **[CHAPTER]** leadership.
- Make arrangements for and attend monthly board meetings, including in-person meetings.

- Email board packets (agenda, minutes and requested items) prior to meeting based on timely receipt of information. Bring an additional five sets to board meetings, and assist the chapter president with other meeting materials as needed.
- Assist secretary in distributing minutes to officers and directors.
- Provide monthly financial reports to chapter treasurer by the 10th of each month based on timely receipt of monthly bank statements.
- Assist president in preparation of the agenda and any other printed meeting materials, including reports on financials, membership statistics, committee activities and conference planning.
- Provide support to committees by distributing information to committee members and maintaining records of committee reports and activities.
- Work with the board to develop a strategic plan for the association.

CONFERENCE AND MEETING SUPPORT

- Record all registrations received online, in the mail or via fax.
- Provide pre-registrations lists as requested.
- Maintain lists of vendors and exhibitors, and work with committee to sell exhibit space.
- Maintain records of donations, gifts and sponsorships.
- Prepare attendee and exhibitor badges and assist in printing and delivery of handouts.
- Process refunds for cancellations made according to chapter policy. Prepare post-conference attendance report and financial report.
- Work with the vice president of administration and the program chair to coordinate meeting space, food and beverage service, and audio visual equipment if needed.
- Record all registrations received online, in the mail or via fax. Note any special requirements of attendees, and fulfill special meal requests as needed.
- Provide pre-registrations list as requested. Supervise on-site registration and coordinate volunteers at registration desk.

Sample Request for Proposals

Chapter Administrator Services

After you develop the job description, you can begin your Chapter Administrator search- the final step in the process. Whether you're looking to hire a firm, or an individual administrator, it is recommended to develop a request for proposals (RFP). You can market your RFP by sending it out to colleagues, posting on job boards and/or sending directly to all AMC's in your area. Below is an RFP Template.

The Association of Fundraising Professionals **[CHAPTER]** seeks proposals from association management organizations to provide day-to-day management and administration of the business and affairs for the Chapter. Responsibilities include **<ITEMIZE SPECIFIC SERVICES REQUIRED; list could include: membership management, event management, technical support including database and website management, and bookkeeping.>** Information contained in this proposal is proprietary and confidential.

[CHAPTER] Information

[CHAPTER] is a chapter of the Association of Fundraising Professionals (AFP). The Web address is **[CHAPTER WEBSITE]**. Founded in **[DATE]**, the Chapter currently has **[##]** members in the **[CITY, STATE/PROVINCE]** area and is a chapter in AFP, which represents more than 30,000 members in more than 230 chapters throughout the world. AFP works to advance philanthropy through advocacy, research, education and certification programs. **[CHAPTER]** has an annual budget of approximately **\$(ANNUAL BUDGET)**. Total dues are **\$(AMOUNT)** per person, of which **\$(AMOUNT)** is rebated to **[CHAPTER]** by the International Headquarters of AFP.

[CHAPTER] strives to enhance philanthropy and volunteerism through a series of programs designed to benefit all those who lead, serve, and support non-profit institutions. Our members represent colleges, universities and secondary schools, hospitals and health care facilities, social service agencies, arts and cultural organizations, and local charities.

Mission

The Association of Fundraising Professionals, **[CHAPTER]** advances philanthropy through professional education, building relationships, peer mentoring, and effective advocacy. AFP is grounded in a code of ethics, standards of professional practice, and committed volunteerism to promote the field of fundraising. AFP stimulates ethical and successful nonprofit development by addressing the needs of diverse fundraising professionals in our region. (Or insert your chapter's mission in this section)

Governance

[CHAPTER] is governed by an elected Board of Directors. The full Board of no more than **[##]** members meets **[MEETING FREQUENCY]**; the Executive Committee meets **[MEETING FREQUENCY]**. **[LIST COMMITTEES AND DESCRIBE GOVERNANCE STRUCTURE; FOR EXAMPLE:**

There are two standing committees: the Executive Committee and the Nominating Committee. There are three Divisions with committees chaired by Vice Presidents: Professional Advancement, Membership, and Marketing/Communications. Ongoing committees include the Conference and National Philanthropy Day committees. The Board establishes additional ad hoc committees and task forces as necessary. Responsibilities of committee members are described in the [CHAPTER] By-Laws and accompanying Governance Policies enclosed with this RFP. As a member-driven organization, many of the activities of [CHAPTER] are accomplished by member volunteers. In addition, [CHAPTER] relies on the support of a paid administrator to facilitate the involvement of volunteers and provide administrative services that are basic to the smooth operation of the chapter.]

Member Benefits & Activities

Benefits of membership in [CHAPTER] include: [LIST CHAPTER BENEFITS; FOR EXAMPLE: chapter newsletter; educational opportunities including educational breakfast and lunch meetings, web conferences, a daylong Conference, and Fundamentals of Fundraising courses (approximately 15 activities per year); National Philanthropy Day awards luncheon; a buddy program; job listings; networking groups; a Diversity Initiative; member orientations; and scholarships to local and International events. Members receive additional benefits through AFP International.]

Additional Information about [CHAPTER]

The following materials are included with this RFP to assist you in preparing a proposal:

1. Audited Financial statement for [YEAR]
2. Board List
3. Strategic Plan
4. Most recent Chapter Newsletter
5. Membership information package
6. Chapter event listing
7. Materials from the annual Conference and National Philanthropy Day
8. [Other relevant items]

Information to be Included in the Proposal

To facilitate review of proposals, please present the following:

- Cover letter introducing your firm.
- Information about your firm, including:
 - Location
 - Number of years in business
 - Services offered
 - Business hours
 - Leadership of the firm and years with the firm
 - Staff size, composition (by position) and areas of expertise

- Résumé(s) of individual(s) proposed to implement the Management Service Agreement, their number of clients currently managed, and the number of hours each would allocate to said implementation
- Demography of clients
- Financial stability
- Business insurance and third-party fidelity bonding of employees
- Technical capabilities (indicate if in-house or outsourced):
 - Desktop publishing
 - Facility with software programs, specifically databases and CVENT
 - Website content management
 - Website hosting and development/design
 - Telephone systems (including ability to offer multi-line conference calls)
 - **[Other relevant items]**
- Experience in handling the duties listed in the Scope of Services.
- Cost of services/compensation, including:
 - Method of billing
 - Projected fee for requested services
 - Expenses, if any, that are not covered by proposal
- Three current client references – preferably including at least one that is a chapter of a national organization (name of organization; name, phone number and e-mail address of president; number of members; number of years they have been a client).
- Your anticipated time/other requirements during any transition period between our current association management firm and full implementation of your firm’s services.
- Any additional information or comments.

Questions and requests for additional information may be addressed to the Chapter Secretary
[CONTACT NAME, PHONE, EMAIL]

Proposal Submission

Please submit your proposal by mail or email to the Chapter Secretary:

[CONTACT NAME]

[MAILING ADDRESS]

[EMAIL ADDRESS]

Submission Deadline: [DATE]

- Finalists will be contacted for in-person interviews. All submissions will be held in strictest confidence and will be acknowledged.
- Contract expected to begin on: **[DATE]**, though this is open to discussion.

I appreciate your potential interest in working with the Association of Fundraising Professionals
[CHAPTER] and look forward to hearing from you.