How to Work Effectively With Your Management Company for the Greater Good of the Organization

NJSHA’s Mission and Vision Statement

**NJSHA’s Mission Statement:**
NJSHA empowers audiologists, speech-language pathologists, speech, language and hearing scientists and future professionals by providing resources and support to its members and those they serve through:
- Professional Development/Continuing Education;
- Advocacy;
- Public awareness; and
- Networking and mentoring.

**NJSHA’s Vision Statement:**
Prioritizing effective communication and the highest quality of life for all through professional excellence.

Positive Aspects

- Management company conducts daily activities at a high professional level, always willing to assist with out-of-the-box ideas while cautioning on aspects that may otherwise be overlooked.
  - Reviews and edits all materials sent out to ensure it meets the organization’s standards.
  - Responds to members’ inquiries independently or forwards to appropriate committee chair/officer.
  - Provides history and suggestions to inform decisions, responses and activities.
Positive Aspects

- Management company conducts daily activities at a high professional level, always willing to assist with out of the box ideas while cautioning on aspects that may otherwise be overlooked. (Continued)
  - Maintains records of board meetings, amendments, resolutions and can locate needed information for Executive Council and Board of Directors inquiries.
  - Calculates membership information.
  - Handles membership renewals.
  - Key component in assisting with organizing and running continuing education events, such as the annual Convention.
  - Negotiates and secures all contracts related to speakers and venues.
  - Ensures our ASHA CEUs are in compliance with guidelines.
  - Participates in a number of NJSHA activities and committees - e.g., Strategic Planning, Leadership Conference, Public Relations Committee.

Positive Aspects

- Management company conducts daily activities at a high professional level, always willing to assist with out of the box ideas while cautioning on aspects that may otherwise be overlooked. (Continued)
  - Assists with numerous activities that involve continuing education, board and committee activities as well as numerous other tasks throughout the year on almost a daily basis.
  - Is willing to take on additional tasks, not always within the scope of the contract.
  - Works with NJSHA’s consultants, e.g., PR consultant and lobbyist to ensure coordination of services, uniformity in what NJSHA presents to its members and the public.

Undesirable Aspects

- Potential to hand over full control to the "experts" or "professionals" is tempting but can lead to a loss of control. The benefits of a volunteer organization are the new ideas and strategies that are presented by new board and committees, however, if the management company remains unchanging, there is a pull towards doing things as they have always been done.
- Having a management company makes up a substantial part of the budget and not include the percentage rate. Percentages of budget will vary from association to association. And this may not necessarily be a con - you have to look at the other side - that having a management company may be less expensive than having the overhead of your own staff, office space, equipment, etc.
- Incorporating other contractors, such as public relations, can be a learning curve for all parties involved.
Strategies to avoid the negative aspects and promote a positive and productive relationship

NJSHA and its management company have an open and honest dialogue that promotes productive changes within the organization.

WE ARE NJSHA!

Working together, while working for each other!

Join us at www.njsha.org

CSHA
California Speech-Language-Hearing Association
Changing Lives Through Communication

Working with Management: Tremendous Learning Experience

Beryl Fogel, M.A. CCC-SLP
CSHA President
CSHA Fellow

Building on CSHA History

- Strong history of representing:
  - Our fields
  - Our expertise
  - Our members and the people we serve

- Moving forward
  - Actively exploring how we can make a greater impact across all areas
  - Identifying areas of need for the organization
  - Triaging to update and develop areas in appropriate sequence
CSHA Management

- Staff of six
  - Executive Director
  - Accounting & Special Projects Manager
  - Conference & Exhibits Manager
  - Continuing Education and Membership Coordinator
  - Conference Coordinator
  - Governance Coordinator - Part time position

Leadership Framework

- CSHA Board and Volunteers participate within a leadership framework in partnership with CSHA management and other staff members
- CSHA Executive Director (ED) plays an integral role in the workings of the association

Executive Director Abilities

- A long list of abilities are required of the ED:
  - Mentoring regarding nonprofit organizations and boards
  - Strategic planning
  - Program development and implementation
  - Organizational management
  - Expert ability to communicate verbally and in writing
  - Creative
  - Excellent social skills
  - And more...

New Executive Director (ED)

- Everything happens for a reason
- CSHA is at a major turning point in the association's history
- Time to make significant changes and rise to the next level
- Brian Lewis, CAE, joined CSHA in July!
**ED Expertise & Experience**

- Strong management/leadership in a professional membership association
- Development and implementation of strategies for recruiting and retaining members
- Communicating an association's value
- Developing and managing a high-performing staff with a strong culture of member service
- Adept at building and maintaining strong relationships with internal and external stakeholders

**Search Completed!**

- Sounds like a job application, right?
- Yes!!
- Brian brings expertise and experience that meet the key criteria for an ED as identified by the CSHA Search Committee

**Board President Functions**

- Guide and counsel the Executive Director
- Appoint committee chairpersons and members
- Act as spokesperson
- Preside at meetings
- Provide overall leadership with a focus on the mission and strategic plan goals

**President as Leader**

- Adhere to primary legal duties
- CSHA board members are unpaid volunteers, yet are obligated to follow three primary legal duties:
  - Duty of Care
  - Duty of Loyalty
  - Duty of Obedience/Duty of Fidelity of Purpose
Reporting Relationships

- Accountability within the association:
- Board is accountable to the membership
- Executive Director is accountable to the Board
- Committees are accountable to the Board
- Association staff are accountable to the Executive Director

Excellent Management Experience

- Includes:
  - Respect
  - Communication
  - Collaboration
  - Creativity
  - Coordination
  - Compromise
  - Education
  - Enjoying our work together!!

Contact Information

- Beryl, CSHA President
- Term: 2017-2019
- (310) 480-1862
- beryl.fogel@outlook.com
Tamara Freeman-Nichols
President

THE GOOD
BENEFITS OF WORKING WITH CRAVEN

- Membership Growth/Management
- Technology/Innovation
- Financial Growth/Stability
- Administrative and Governance Support
- Event Coordination and Management
- Expert Consultation and Guidance

THE GOOD
SECRETS TO OUR SUCCESS

- Trust
- Communication
- Accountability
- Teamwork

SHAV IS A PROUD CLIENT OF CRAVEN MANAGEMENT ASSOCIATES
Poor Communication
Financial Mismanagement
Negative Interpersonal Dynamics
Poor Member Services
Unsuccessful, Dysfunctional Association

THE UGLY
NAVIGATING CHANGE & CONFLICT

Personnel Changes
Board Member Changes
Negotiating New Contractual Terms
Addressing Unmet Expectations
Changes for Organization Sustainability
The End of the Road

OUR FUTURE WITH CRAVEN MANAGEMENT...

How to Work Effectively With Your Management Company
for the Greater Good of Your State Organization

Jacob Gutshall, MHS, CCC-SLP
MSHA President 2018-2019
Management Contract

- Outline AMC Duties
  - Membership
  - Finances
  - Events
  - Meetings
  - Publications
  - Technology

Fees

- Negotiate AMC Fees
  - Annual Fee
    - Daily Operations
    - Daily Communications
    - Data Management
  - Additional Fees
    - Office Supplies-paper, phone, postage, etc.
    - Publications-per document and per page
    - Continuing Education Tracking-per attendee
    - Convention Enrollment-per attendee
    - Marketing and Advertising-percentage of revenue
    - Travel, Food & Lodging-AMC attend meetings
    - Additional-technology updates, extra meetings, etc.

Relationship

- Dedicated Association Manager
  - Voice of Association
  - Duties and updates
  - Planning, schedules and timelines
  - Regular communication with 3Ps and Chairs
  - Policies & Procedures
  - EB Minutes and decisions
  - Hierarchy of decisions

Oversight

- Transfer of Knowledge
  - 3 President’s Transitions
  - Treasurer Monthly Financials
  - EB Policies and Procedures
  - AMC Yearly Reviews
  - AMC Audit
WORKING EFFECTIVELY WITH YOUR MANAGEMENT COMPANY: THE GOOD
ASHLEN THOMASON & LEANN GRIFFITH
ARKANSAS SPEECH-LANGUAGE HEARING ASSOCIATION

BEST MANAGEMENT

• ASSOCIATION MANAGEMENT COMPANY (AMC)
• WOMAN-OWNED BUSINESS
• IN BUSINESS FOR OVER 25 YEARS
• CURRENTLY HAVE 20 CLIENTS

BEST MANAGEMENT

• CENTRAL OFFICE FOR ARKSHA
• ADMINISTRATIVE SUPPORT
• INDUSTRY LIASON
• FINANCIAL SERVICES: USING CONTROL PROCEDURES AND BEST ACCOUNTING
• FINANCE: ASSIST IN THE DEVELOPMENT OF A YEARLY BUDGET, PROVIDE MONTHLY BOOKKEEPING, PREPARE DOCUMENTS FOR TAX FILING
• MAINTAIN MEMBERSHIP RECORDS: INVOICE AND COLLECT ANNUAL MEMBERSHIP DUES
• BOARD OF DIRECTORS: NOTIFY THE BOARD OF TIMES/DATES/LOCATIONS OF MEETINGS; TAKE & TRANSCRIBE MINUTES; ATTEND TO ANY ACTION ITEMS; MAINTAIN BOARD MEETING RECORDS
• GRAPHIC DESIGN, WEB, NEWSLETTER: WORKING WITH APPROPRIATE COMMITTEES, MAINTAIN UPDATES ON THE WEBSITE, TYPESET AND EMAIL FOUR ELECTRONIC NEWSLETTERS PER YEAR; MEMBERS-ONLY FACEBOOK PAGE
• ANNUAL CONVENTION: WORK WITH LEADERSHIP HANDLING ALL ASPECTS OF MEETING PRODUCTION, INCLUDE ALL ONSITE ASPECTS
• STORAGE: MAINTAIN GENERAL FILES, MEETING FILES, AND ORGANIZATIONAL HISTORY

MARTHA PORTERFIELD

• JOINED THE TEAM AT BEST IN DECEMBER 2005
• EXECUTIVE DIRECTOR FOR ARKSHA SINCE JANUARY, 2011
• BECAME PARTNER AT BEST IN JANUARY, 2018
• GRADUATE FROM UCA, MAJOR IN SPEECH COMMUNICATION/PUBLIC RELATIONS
MARILYN PORTERFIELD

- Knows roles and bylaws
- Will edit or draft correspondence or documents
- Has support staff to fill in when needed
- Knows ARKSHA-specific tasks (updating ASHA, grant deadlines, contacts for student advocacy day, providing help with parliamentary procedure with incoming president, content areas)
- Organized, responsive, well-spoken, not easily overwhelmed