

AN ALLEN PRESS SEMINAR

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BLUEPRINT FOR SUSTAINABLE PUBLICATIONS

BEST PRACTICES & INNOVATIVE SOLUTIONS

Association Management Services

Susan Metzger

Director of Association Management Services

What are Association Management Services?

Definition:

Business management services, primarily *non-journal production specific*, provided to societies and associations (for profit and non-profit)

Main Components of Association Management Services

- Professional and administrative services for associations/societies
- Centralized office serving as client's headquarters
- Service that offers shared resources to reduce client overhead costs

Association Industry

- Serves more than 4,600 associations
- Encompasses nearly 5 million association members
- Industry growth rate of more than 150%
- Currently AMCs manage less than 5% of the total associations in the nation¹
- Benefits both small and large associations

¹AMC Institute Guide to Association Management Companies, Supplement to Associations Now 07/07

Industry Organizations

- AMC Institute
 - AMC Institute is the only trade association that is focused on the unique needs of the association management company owner. Formed in 1963.
 - Allen Press is a member

Industry Organizations

- ASAE (American Society for Association Executives) and the Center for Association Leadership
 - ASAE is the membership organization and voice of the association profession. Founded in 1920.
 - The Center for Association Leadership is the premier provider of learning and knowledge for the association community. Founded in 2001.
 - All Association Managers and Executive Directors are Members
 - One Association Manager has obtained her CAE (Certified Association Executive)

Association Management at Allen Press

- Providing services for over 25 years
- Currently manage 58 societies with 82 journals
 - Members only
 - Subscribers only
 - Member and Subscribers
 - Executive Services

Profile of AP AMS Customers



- Primarily Nonprofit
- Scientific, Medical and Technical Societies
- Mostly Professional or Member Organizations
- National and International

Association Management Experience

16 Total Staff

Overall Experience 90+ years

- Three Executive Directors
- Seven Association Managers
- Three Association Service Reps
- Renewals Coordinator
- Meeting Manager
- Director

Services

- Subscription and/or Membership Management

Services

- Subscription and/or Membership Management
- Online Membership Services - TIMSS
(**T**MA Resources, Inc. **I**ntegrated **M**ember **S**ervices **S**olution)

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- Executive Services

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- Financial (Accounting) Services

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- Financial (Accounting) Services
- Author Billing

Services

- Subscription and/or Membership Management
- Online Membership Services - TIMSS (TMA Resources, Inc. Integrated Member Services Solution)
- Executive Services
- Financial (Accounting) Services
- Author Billing
- Warehousing/Fulfillment

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- Executive Services
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- Warehousing/Fulfillment
- Association Marketing

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- Association Marketing
- Meeting Management
- Online Abstract Submission

Subscription & Membership Mgmt

- Maintain electronic database
 - Conversion of electronic data at implementation
 - Standard demographics (name, address phone, fax, e-mail) + additional parameters (birth date, position, education, etc.) available
- Annual dues processing
- Resolve subscriber and member questions
- Provide Association monthly reports
- Provide online journal host member/subscriber access info
- Mail list generation



Online Membership Services



Internet presence allowing increased visibility and customer service

- Business site
- Link to society website or Allen Press can host society website
- Members can:
 - maintain their profile
 - make payments/renew
 - view and search Membership Directory
 - participate in discussion forums
 - take part in surveys/ballots
- Broadcast email

Executive Services

The Society Executive is an organizational leader reporting directly to the Board of Directors. The Allen Press Society Executive can assist with:



- Strategic Planning
- Public Relations
- Project Management
- Meeting preparation and oversight
- Fundraising
- Contract negotiation and administration
- Administrative services

Financial (Accounting) Services

- Wide range of services available
- Services customized to meet client needs
- Basic accounting included in AM services

Author Billing

Billing and processing of author fees

- Generate and mail itemized invoices
- If original invoice is not paid, generate and mail 2 follow-up notifications
- Society responsible for collecting
- Process payments
- Provide detailed reports



Warehousing/Fulfillment



- Store journal back issues and books
- Fulfill individual or multiple copy orders
- Service available if the journals and/or books are printed by Allen Press or another printer

Association Marketing Services

Renewal Program

- Included in Association Management Fee
- Provide a Campaign Schedule
- Members and/or subscribers
- Up to six mailings per year; combination of paper and electronic
- Can include special pieces such as library acquisition cards, membership welcome cards, and “pass along to a colleague” cards
- Buyer’s Guide ad



Client Specific Marketing

- Customized programs to help client generate additional revenue
- Quoted based on client’s specific needs

Meeting Management Services

- Pre-Planning and Planning
- Site Selection
- Contract Negotiations
- Online Pre-Registration Services
- Meeting and Event Management
- Exhibitor and Sponsor Management
- Hotel Room Block Management
- Meeting Marketing and Promotion



Online Abstract Submission

- Allows corresponding author to submit online an abstract or summary “preview” of topic prior to meeting or conference
- All abstracts reviewed and consolidated prior to meeting
- Abstract book may or may not be printed by Allen Press
- Online abstract submission services may be purchased even if meeting management services are not provided



How does Association Management fit in with the rest of our offerings?

The Business office is an important arm of the Society along with peer review, print, online publishing and advertising and provides a valued service to your members and subscribers.

Reasons to Partner with Allen Press

- Centralization of staff, files and history
- Free your Board to focus on policy issues
- Access the latest technological advances, without the associated costs
- Provide continuity of business operations through various changes in society leadership

Questions?



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What percentage of associations are currently managed by an association management company?

Less than 5%

What does ASAE stand for?

American Society for
Association Executives



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BEST PRACTICES & INNOVATIVE SOLUTIONS

Association Management Services

Derek Gates, Manager of Client Accounting Services

What are Client Accounting Services?

Definition:

Accounting services, including membership payment processing, quarterly financial statements and coordination of annual tax filings provided to societies and associations (for profit and non-profit).

Topics to Consider

- Have sound financial practices been established, including a Board directed investment plan?
- Does your association require an annual audit, or will a review be sufficient?
- Are all annual IRS and State filings up to date?

Topics to Consider

- Are you keeping credit card details secured?
 - Secure deposit backup
 - Marking out processed credit card numbers
 - Saving card details in one database
- Onsite check deposit

Form 990 – 2008 Tax Year

990-N	Gross receipts less than \$25K
990-EZ	Gross receipts between \$25k-\$1M <i>AND</i> Total assets less than \$2.5M
990	Gross receipts greater than \$1M <i>AND/OR</i> Total assets greater than \$2.5M

Form 990 – 2009 Tax Year

990-N	Gross receipts less than \$25K
990-EZ	Gross receipts between \$25k-\$500k <i>AND</i> Total assets less than \$1.25M
990	Gross receipts greater than \$500k <i>AND/OR</i> Total assets greater than \$1.25M

Form 990 – 2010 Tax Year

990-N	Gross receipts less than \$50K
990-EZ	Gross receipts between \$50k-\$200k <i>AND</i> Total assets less than \$500k
990	Gross receipts greater than \$200k <i>AND/OR</i> Total assets greater than \$500k

Form 990

- Part IV – Item 28c
 - Did a current or former officer serve as an officer or member of an entity doing business with the organization?
(Schedule L Part IV)
- Part VII – Section A – Item 3
 - Officer List: An Executive Director is considered an officer, though has \$0 compensation.

Form 990

- Board Minutes
 - Supply minutes if available
 - Email string is sufficient if no minutes are available
- Conflict of Interest Policy
 - Supply written policy
 - Board members sign off annually

Questions?



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What are two ways to secure credit card details?

- 1) Marking out processed credit card numbers
- 2) Storing portions of card number and expiration date in separate database.

For the 2008 tax year, what criteria requires a Form 990 filing?

Gross Receipts greater than \$1M

AND/OR

Total Assets greater than \$2.5M

What do you submit if you don't have
Board Meeting minutes?

Email string discussing Society business