HOW TO CONDUCT AN INTERVIEW WITH A PROSPECTIVE ASSOCIATION MANAGEMENT COMPANY

Choosing an AMC to manage all or part of your association affairs is analogous to romantic courtship. Both partners want to get to know each other in an atmosphere of candor, respect, and comfort that will set the tone for a dignified, "no thank you, I don't think this is the right fit," or "let's go forward in an atmosphere that fosters trust and productivity." The interview process sets the stage for the relationship and must be conducted with care. Associations are given special status in our society because they act in the public interest. This is evidenced by their tax-exempt status, a status that holds them to additional public scrutiny and disclosure. The fiduciary responsibilities of boards of directors or trustees must be met with proper diligence; choosing the most appropriate management team is crucial to fulfilling these responsibilities. Association officers should expect to meet the following personnel during the interview process: owner, account executive (or designated "executive director/CEO"), and principal project staff who will be part of account executive's team (i.e., meeting planner, editor, and anyone interfacing directly with the association's members).Chemistry is important. Association officers need to choose an AMC with whom they are comfortable. The size should feel right. They don't want their members to feel lost or neglected, nor do they want to feel overwhelmed in a sea of many clients. Style is an important element in selecting the right AMC. Are your members formal, structure oriented, and driven by detail, or are they casual, comfortable with delegating, and focused on results? Is participation in the process part of the benefit, or is project management a greater priority? The intangibles and cultures should mesh to maximize productivity. What style is most compatible with the needs and wants of your members and stakeholders? The AMC exists to help accomplish the various missions of its clients. Be sure you feel your association's needs are understood, and that its uniqueness is valued and appreciated. How enthusiastic is the AMC about your mission?

The Presentation/Interview

You should not schedule more than three AMC presentations a day. In a long stretch of presentations, companies may begin to sound and look alike, and committee members may find it difficult to concentrate. Allow a minimum of two hours for each presentation. The presentation should include both the formal presentation and a question-and-answer session. Make sure that the account executive who will serve your group is a part of the presentation team. It is also helpful to meet other staff, if possible, either during the visitation or at formal presentation. Have audiovisual equipment ready for each presenter, if the equipment has been requested. When setting the presentation appointments, ask if the presenter will require a slide projector, overhead projector, flip chart, video cassette recorder, or any other audiovisual equipment. Then arrange for the appropriate equipment to be available for the presentation. It may be helpful to have an audio-visual engineer available on site. Make sure the presenter has ample space for the presentation. Before the presentation, prepare a series of questions to ask each AMC presenting. Assign each member of the selection committee a particular area of the proposal to question. Assess the different responses that each company gives to the same questions. At the close of each presentation, explain your decision process to each presenting company. Identify the final determination date. If you expect to conduct further negotiations, state when you expect those negotiations to take place.

Sample Questions to Ask an AMC

How does your AMC's mission and philosophy compare with that of our association?

- What characterizes the geographic scope, budget size, and membership traits of the clients you serve?
- Are any of your existing clients potential competitors of our association?
- Will the legislative agenda of any of your clients conflict with ours?
- What is the range of services and capabilities provided by your employees? Do you outsource any management functions, such as data management, meeting planning, financial record keeping, publishing, or mailing services, and how are the agreements with subvendors handled?
- What resources and equipment do you have to support your client needs? Do you have capacity to serve our organization? Will we own any equipment, or are all such assets the property of the AMC?
- Who decides which software programs (such as accounting and membership database) to use?
- What procedure do you have for computer system back-up, and how will we access our data? Do you have a disaster plan prepared?
- What reports can we expect? In what format will they be presented? How frequently?
- Do you provide full-service management, stand-alone functions, or both?
- May our volunteers provide some services, and contract with you for others? Do you partner any functions with volunteers?
- Who would be assigned to our account? What is their background and experience? Who do they report to?
- Would we have our own dedicated executive, or would we be assigned to a team that performs a range of functions for multiple clients?
- Will we have access to the owner or principal, and if so, on what basis?
- What are the strengths of your AMC, and what kinds of clients do you serve most successfully?
- Have there been any recent changes in ownership or leadership? Are there any plans for merger, consolidation, or buyout, and if so, what succession plan is in place for a smooth transition?
- Is there a conference room or other space at your office for board or committee meetings for your clients? Where do your clients customarily meet?
- Do you have capacity for a resource library to keep current with our unique issues, membership concerns, professional standards, and trade journals? How will our documents be archived?
- Do you have a firm resume? What measures do you take to train your employees? What does staff do to keep current professionally? What professional organizations do they belong to and take leadership positions in?
- Do you have the ability to design and maintain a Web site for our group? Will we have our own domain?
- How do you set your fees? Retainer? Time/hourly based? By project?
- How will our financial assets be managed?
- What about contract terms, evaluation, renewal, and cancellation?
- Who do you expect to act as the official spokesperson for our organization? How will public relations issues be handled?
- How will our organizational image be projected under your firm's umbrella? Will we have a sign on the door, a dedicated phone line, membership access to our account representatives? Could historical or symbolic items be displayed?
- What is the cost benefit to us for using your firm instead of managing our own organization?

Reference:
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