BALANCE, CONSTANT MOTION & STRENGTH IN CONTINUITY

At Association Acumen, we’ve got a proven process for professionally managing and bringing excellence to progressive small and mid-size associations. Over the years it has evolved to look like this:

This process is tweaked and modified each time we implement it. And, although we repeat it year after year for each of our clients, it never looks the same. We don’t expect that it ever will.

Things have to change to be relevant, and yet, things have to be consistent to be strong. We are balancing both at Acumen, within our Management Team and with every one of our client associations.

As of July 1, 2017, Betsy Smith took on the title and responsibilities of Association Acumen President. Betsy served as Vice President of Finance for approximately five years. As president, Betsy’s responsibilities shift to implementing strategic goals, managing day to day operations and maintaining customer service excellence. Many of you have met with her already. She will continue to travel to client meetings to meet with every Board over the coming year.

Gail Bast continues as CEO and owner of Association Acumen, serving as the company visionary as well as fulfilling management oversight with an eye towards maintaining continuity and preserving managerial greatness. Also, as of July 1, Bill Elliott was named Association Acumen’s Vice President of Operations. Bill brings a wealth of knowledge from his industry background and has a proven track record for leading and supporting client growth and providing cutting-edge innovation through technology. Bill will focus on maximizing vendor-partner relationships and cross-pollinating client teams to improve and share best practices and ensure ongoing client evolution.

Together, we lead a mid-size Association Management Company that is nimble, tech-savvy and committed to making best practices better. We bring you superb financial transparency and consistent reporting. And we take pride in bringing a state-of-the-art marketing experience to your association members.

“Life is like riding a bicycle. To keep your balance, you must keep moving.”

- Albert Einstein

We are grateful for the opportunity to be of service; to lead and to guide organizational evolution!

Yours truly,

Gail Smith
CEO

Betsy Smith
President

Bill Elliott
Vice-President

Sandy Koehler
Compliance Director
LEADERSHIP LESSONS, PART 1:
By Jeffrey Bluestone, PhD
President, Federation of Clinical Immunology Societies (FOCIS)

Dr. Bluestone is a Professor of Metabolism and Endocrinology and the Director of the Hormone Research Institute in the Diabetes Center at the University of California-San Francisco. He is also President and CEO of the Parker Institute for Cancer Immunotherapy. For more information about FOCIS, please visit www.focisnet.org.

Q: How did you first get involved with FOCIS?
A: Dr. David Hafler and Dr. Garry Fathman were colleagues I interacted with in the Immune Tolerance Network (ITN). We discussed how to take immunology and expand it across a wide variety of research areas. When they started FOCIS, they asked me to include the ITN, so we were a partner organization from the very beginning. I took a seat on the FOCIS Board and was head of the FOCIS Centers of Excellence (FCE) at UCSF.

Q: How has FOCIS changed your world?
A: It’s been an incredibly important organization for the community – from the meeting, which has truly had a broad impact on people from a variety of different areas of immunology, to the FCEs, to the education courses. It’s been an important outlet for the things I care a lot about – great science, collaboration, and efficiency.

Q: What are your goals as the FOCIS President?
A: I’d love to see the core values of FOCIS, the interdisciplinary model and collaboration efforts across the societies continue to grow and touch more people, specifically young scientists so they can participate in what I think is the most exciting field of science (the immune system). Whether it’s in transplants or cancer or asthma and allergy, I hope we can continue to bring an interdisciplinary effort to use immunology as not just a tool to fend off disease, but as a therapy to treat disease.

GOING GLOBAL: WEIGHING THE OPTIONS
By Bill Elliott, CAE
Association Acumen Vice President of Operations, Executive Director of the Automotive Fleet & Leasing Association (AFLA) and the International Association of Special Investigation Units (IASIU). Both AFLA and IAISU are currently working in the global space.

Government and multinational companies have been primarily focused on globalization for years, yet association members are only recently seeing global responsibilities being shifted to their plate on a regular basis. Many of the organizations we partner with work in a global space, all with different strategies and expectations. When you look at the initiatives closely, you’ll see two models of international growth:

1. Federated globalization
   Associations from various countries and regions partner with similar organizations on a global scale to share market reports, contacts, best practices and educational materials. These federations may be tied together loosely through memorandums of understanding or through a governance structure specifically formed for the international community.

2. Unified globalization
   The international headquarters develops its own chapters or components across international borders, controlling the growth and services while taking on a larger risk. There are obvious partners through other groups that may want to merge into the associations; at other times leaders and staff work to identify local individuals who create a presence in their region.

Lines can blur between the two models; neither is right or wrong. As you begin your global journey, it is imperative you identify your organization’s goals, road map, commitment to the investment (it won’t be cheap) and risk tolerance. If your organization is considering an opportunity in a new market, start by having a dialogue between your President and your Executive Director to discuss what it would take to do your due diligence.

Five international fleet associations, including the Automotive Fleet & Leasing Association (AFLA), partnered to form the Global Fleet Networking Consortium to promote the exchange of ideas and best practices. Pictured (left to right) are: AFLA Executive Director Bill Elliott, AFLA President Michael Bieger, AfMA Executive Director Mace Hartley and AFLA Global Committee Chair Mike Antich.
BUILDING BETTER BOARD & CEO RELATIONSHIPS

Association Acumen is dedicated to helping boards succeed. According to Mike Mathy, CAE, “Providing timely data and analysis of the issues to provide the board with the information they need to make critical decisions is crucial. Also being completely transparent and accountable and coming prepared with solutions to issues facing the association works best,” he said. Mathy is Executive Director of the Federation of Clinical Immunology Societies and the National Vehicle Leasing Association at Association Acumen.

“I’m focused on working with leaders to create an open and frank environment where everyone is encouraged to contribute. It’s necessary for everyone to be courageous about discussing concerns, valuing different perspectives and admitting mistakes,” Lori Rathje, CAE, said. Rathje is Executive Director of the Society for Mucosal Immunology and the Ophthalmic Anesthesia Society at Acumen. “Asking board members to assume the perspective of constituents affected by the decision is a unique way of approaching issues.”

“There must be clarity about roles,” Mathy said. “Board members decide where the organization should be in the future. The Executive Director helps realize that vision and manages daily activities. It’s helpful for the board and the Executive Director to jointly determine what should be included in board reports and then set the preferred communication format. There should be no surprises; constant communication is vital!” Mathy added.

CONTRACT LAW: HOW ACUMEN HELPS KEEP ASSOCIATIONS SAFE

Imagine this scenario: a devastating flood or terrorist attack hits the city where your association is due to hold a meeting. Is the association protected against loss if the meeting has to be cancelled?

Association Acumen works hard to protect its client associations legally with Force Majeure contract provisions that permit either party to terminate a contract without damages if fulfillment of obligations is impossible by occurrences outside the control of either party, such as severe weather and terrorism. We investigate legal pitfalls that hotel contracts present and always include language beneficial to our clients.

We look at who has the Capacity to Contract. A party without legal capacity to contract can void a contract. We only sign contracts with those who have expressly been given the right to enter into a contract.

Attrition clauses can be sticky wickets. These clauses provide for payment of damages to a hotel when the association fails to fully utilize the room block specified. We monitor the room block closely to avoid paying attrition and specify in our contract verbiage that attrition should be calculated using a cumulative method instead of day by day. This just made a $35,000 difference to a meeting held in July in Washington, DC.

Acumen regularly holds contract law educational sessions with guest attorneys and our staff. We take association liability seriously and have proactive safeguards in place to avoid nightmares like the one described above.

NEWS OF NOTE

Thanks to John Kloc for his Service!

John Kloc, FCLS, the Treasurer of the International Association of Special Investigation Units (IASIU), is retiring in September. Kloc has served on the IASIU board since 2013 and has been in the insurance industry for over thirty years, most recently as National SIU Director for Sentry Insurance of Stevens Point, Wisconsin.

“I want to congratulate John on his retirement and his contributions to IASIU, the Insurance Fraud industry and the Sentry Insurance Special Investigation Unit,” Wade Wickre, IASIU’s President, said.

“Thanks to Acumen and the work of many, IASIU has prospered and become a top flight professional organization. It was an honor to be along for the ride,” Kloc said.

Thanks again for all you have done (and continue to do) for IASIU. Your leadership will be missed!

DID YOU KNOW?

Did you know that the city of Milwaukee hosts The World’s Largest Music Festival? (A title certified by Guinness World Records.) The festival lasts 11 days with more than 1,000 performances and attracts more than 800,000 people each year.

The Acumen staff takes a break from their busy summer to celebrate at Summerfest.

DID YOU KNOW?

Did you know that Acumen raises client assets an average of 28% in the first two years of management?
Acumen Leadership Team Attends Regional AMCI Event

The Acumen Leadership Team (Gail Bast, CEO; Betsy Smith, President; Senior Management Team Member Sandra Koehler, along with Executive Directors Beth Klipping, Mike Mathy and Lori Rathje) attended the recent Regional Event held in Milwaukee, Wisconsin, presented by the Association Management Company Institute (AMCI).

“It’s a great opportunity for us to connect and network with our regional colleagues who have similar issues,” Bast said. “The information sharing we receive on best practices and through brainstorming is invaluable not only for professional development but also for enhancing service to our clients.”

Sessions focused on policies, procedures, strategic planning, effective communication tactics and board governance. Speakers described how staff leaders can advance operational excellence while supporting strategy. The AMC Institute accreditation program is based upon the American National Standards Institute (ANSI) approved standard for good AMC practices. The Institute has accredited and reaccredited Association Acumen three times.

WHAT’S NEW & WHO’S WHO 🎓

ACUMEN STAFF ROCKIN’ THE AWARDS 🎉

Congratulations to IASIU’s Co-Editors Leslie Wagner and Ellen Withers and managing editor Greg Haag! They received the 2017 APEX Award for Publication Excellence for the International Association of Special Investigation Units (IASIU) quarterly magazine, SIU Today.

Association Acumen 2017 CAE Study Group.
Elizabeth Schlicht (right) led a Certified Association Executive (CAE) Study Group at Association Acumen. The Study Group met to review the nine different domains of the CAE exam. 100% of Acumen’s Leadership Team holds an advanced degree or certification.

Congratulations also go out to Melinda Waite, Membership and Marketing Manager who received the Acumen Evolving Eagle Award. The annual award is presented to the individual who has grown the most professionally.

MIKE MATHY RECEIVES CAE

To earn the Certified Association Executive designation, an applicant needs a minimum of three years of experience in nonprofit organization management and 100 hours of specialized professional development, then pass a stringent examination.

COMING IN THE NEXT ISSUE 📚

• Leadership Lessons from Jeffrey Bluestone, PhD, Part 2
• Fall Meetings Recap
• Cyber Risk: What Board Members Need to Know & MORE!