

Learning to Say 'No' Exceeds Client Expectations

By Amy Williams, CAE, MPA

Association Headquarters' mission, "to exceed our client partners' expectations daily . . . no exceptions," has meant that we've been willing to go beyond the contracted scope of work to provide the highest level of service to our 20-plus client partners. As a result, many of our associations, including the American Association for Aerosol Research (AAAR), use significantly more staff hours each year than their contracts provide and consequently face overages in management fees.

AAAR came to Association Headquarters in 2002 and since that time has faced overages each year, totaling nearly \$105,000 (32 percent of the association's total fees). To maintain a strong client partnership with AAAR, AH forgave more than 75 percent of those overages. Clearly, we could no longer continue to do so nor could AAAR afford to increase the contracted management hours and fees to the level at which the organization had been operating. In October 2004, the AAAR Board of Directors asked the executive director to develop a plan to keep the management hours/fees in check. The Management Resource Control Plan that was developed focuses on three areas.

1. Determining volunteer responsibilities. There were numerous activities done by the staff that could/should have been done by the volunteers. The staff developed a list of tasks that could be transitioned to the volunteers. At the same time, we identified projects that could be streamlined to be done more efficiently. We also identified several tasks to eliminate because their benefit was minimal.

After the AAAR Executive Committee reviewed and approved the list of tasks, we amended the management contract to include an updated scope of work and revised hours' allocation.

2. Tracking and reporting hours. Perhaps most critical to the plan are the changes that were made to the way we track and report management hours, both internally and to the board. To ensure that we were keeping accurate time records, our time-tracking system was updated to include a category for each major project/responsibility and subcategories as needed.

Previously, monthly hour reports were only shared with the executive committee. Now, they are also shared at monthly team meetings and at board meetings. Several times a year we do a projection of year-end hours and immediately bring to the executive committee's attention any areas of concern (i.e., potential overages) and seek an immediate solution.

3. Improving communication. Open communication and a clear understanding of roles have gone a long way in preventing the unexpected overages that occurred in the past. Because we educated the volunteers on the need for the plan, there weren't many instances when staff was asked to take on a project that was outside the approved scope of work. In the few instances that we did, staff followed the plan that was put in place for such requests. Staff

immediately notifies the executive director of the request, before beginning work on the project. The executive director contacts the volunteer to explain the board's commitment to control management hours and determine if the volunteer could manage the project. If there is a compelling reason why the project should be staff managed, the executive director presents the issue to the executive committee for consideration. If the executive director determines that the project could be volunteer managed, but the individual making the request disagrees, the president or vice president will intervene.

The board knows that staff is willing and able to take on additional responsibilities outside the scope of work. However, the executive committee must be aware of and give email approval, which is maintained as backup, prior to work being undertaken. The board understands that hours spent on approved projects outside the scope of work will be tracked apart from the contracted management hours and may result in overage charges at the end of the year.

After a full year of the plan under our belts, AAAR, for the first time since coming to AH, did not have an overage in 2005. The plan was a success not only in terms of the hours saved, but also in the improved communication that resulted from the plan, which, in turn, has created a much stronger partnership between AAAR and AH.

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