

arden solutions

Our Services Explained

Executive Director / Governance / Committees

Executive Directors (EDs) both serve the governing board and lead it. It is the key role/position between the association and all the work that gets done for the association by the AMC. Arden Solutions can provide Executive Director Services or can provide support for your Executive Director. The following explanation shares our view and approach to the Executive Director role assuming the Executive Director is provided by Arden Solutions.

EDs understand the difference between strategy and operations and advise the board on strategy and implement that strategy by collaborating with board members and other leaders. However, the ED is in charge of operations and staff working on behalf of the association report directory to the AMC.

A key ingredient in the ED / association relationship is regular, thoughtful, honest, and consistent communication. All associations that contract with Arden Solutions should expect that their board president will regularly meet with the ED.

The ED is responsible for implementing strategic initiatives, programs, and policies, provides visioning, acts as liaison with other associations, provides support to chapters and committees, board development and orientation, strategic planning, bylaws review and revisions, and other assorted tasks. The ED is also responsible for oversight of the business of associations which includes ensuring solid financial planning and reporting, state, and national filings, timely annual 990 tax filing, compilation, review and/or audit, and other required business duties. Development of an annual budget, including a separate budget exercise to make sure that the registration fee for events is properly selected based on actual costs, is a key responsibility.

The ED is expected to serve in a variety of ways and in cooperation with officers and committees. We have effective methods for, managing Board meeting and committee materials. Included in this is managing elections, supporting nominations and elections processes in a confidential and efficient manner. Succession planning for Association leadership at the governance and committee level is crucial.

Key elements of ED leadership also include ascertaining Board needs for education and training through assessment opportunities. Strategic plans should be living documents providing guidance over time as Board members change.

An effective Board and Governance system is supported by clear understanding of the roles and responsibilities of the Board. Arden Solutions can help the Board define itself and its role in serving the association's mission in service to the association members.

Association Management System / Database, Files

Association management systems, or AMS's, are commercial products that combine website Content Management Systems (CMS) with a member database. While AS recommends these products and helps an association search for just the right solution, we also work with custom databases and WordPress or Wix websites.

In an AMS, a member can login to the website and access information not available to the public or non-members. A CMS is often template driven and our staff can handle basic website maintenance without an outsourced webmaster. This lends an efficiency and speed to changes that is very helpful. For instance, if a blast email goes

out and then we start getting questions about something confusing, we can quickly make changes to prevent further questions before they arise.

The database portion of an AMS keeps member and organizational data, provides blast email communication with query options to target specific groups, includes a separate database section for prospective members, handles membership renewal (with reminders), allows for grace periods, includes registration and other form functions such as donations, allows use for award nominations, among other features. For each email we can see open rates, bounces (thus allowing for the database to be updated) and click-through rates. We can also see if an individual actually opened an email that they purport not to have received! This helps us help members to better use the resources of the association.

Arden Solutions is a virtual organization and client files are kept cloud-based, and as such, a client leadership officer can have download access to all association electronic records, thus creating a sense of security for the association that should something happen to us, your files are your files.

Membership / Growth

It goes without saying that membership is the lifeblood of an association and services to members consistent with mission is critical. Membership can be directed by staff, but it works best in close cooperation with a dedicated volunteer group. Responsibilities in service to associations includes, but it not limited to:

- Setting and meeting annual membership/revenue goals
- Strategies for retention and acquisition (and attending own continuing professional education to stay on top of trends and new, effective ideas).
- Member services (phone and email) and membership database expertise
- Working with Marketing & Communication, develop membership communication schedule (it is assumed that the AMS will have built in reminders), as well as membership campaigns
- Member onboarding, recognition, outreach programs
- Membership data and reports for continuing insight, analysis, and program development

Financials

Arden Solutions works closely with Association treasurers and finance committees. Reconciliations of bank accounts and credit cards are conducted monthly, and reports to association clients are provided monthly and special reports within a day or two, upon request. Actual-against-budget reports are easily produced. In addition, we are expert at budgeting both annual budgets and annual meeting budgets (separate to accurately predict a registration fee that has the likelihood of at least breaking even). That is, we provide accurate and budgets to be contemplated by the decision-making body. We use QuickBooks Professional Desktop Remote. Records for each client are maintained in a dedicated QB account by a full-time bookkeeper.

Marketing / Communications

Marketing and Communications is a staff function planned in collaboration with leadership but having most interaction with Membership and Marketing Committees. We use the channels of email (bulk usually through the AMS for tracking and statistics), social media, and snail mail. We highly recommend developing an annual plan using a detailed association-wide calendar. Social media usually necessitates a staff lead, but it works best with member. We will closely collaborate with association leadership to develop marketing graphics. We have a highly gifted, reliable, cost-conservative graphics vendor that we recommend to our clients on a no-commission basis. Likewise, we have a printing company we recommend. We have been using these services for over 25 years.

Certification

Arden Solutions staff offer our clients in-depth experience in planning, producing, documenting, testing in the provision of both certificate and certification programs.

Research and Data Collection, Analysis

On staff we have professionals with experience in qualitative research practice such as interviewing and focus groups. We also have expertise in quantitative research. We are highly skilled or can provide access to outside experts for conducting and analyzing research data.

Events Live, Virtual, and Hybrid

Meeting planning is a key staff position for good reason. Conferences are likely a premiere event and need to deliver/share knowledge, facilitate networking, conduct business, allow participants to feel appreciated and educated, and allow the association to close the event in the black. These events represent substantial reputational and revenue channels. The planning and logistics necessary for events to be successful and flow smoothly for all stakeholders is almost endless. Meeting planning is an Arden Solutions specialty, and our experienced staff is adept at winning our clients concessions that less experienced personnel would miss. In addition, our many years of hotel contracting, attending continuing professional education at MPI and ASAE, have helped us create contract clauses that better protect our clients. Our current staff has over 75 years' experience planning and executing events; two of us are credentialed.

Arden Solutions has an IATA number, which enables commissioning events held at hotels. Unlike other third-party groups who can source a venue at no cost to you, actually allows them to get paid directly from the hotel through the same commissioning that we can offer. But we have a special twist on this: we offer to split the hotel commission with our clients. Let's say there are 1,000 total room nights contracted/picked up at a rate of \$200/night = revenue of \$200,000. Commission at 7% pays the IATA holder \$14,000, which, when split with you creates a revenue stream of \$7,000 to the association. Our client's best interest is always in our best interest, and we are transparent with our earned commission rates and how this affects costs.

Since this is such a critical part of most associations, we offer considerable detail, which follows.

<p>PLANNING</p>	<p>Interviewing stakeholders to understand expectations and scope, budgeting to determine defensible registration fees, preparing for and attending board and/or committee meetings, obtaining continuing education credits. Collaborate with marketing committee and AS marketing staff to encourage maximum participation, sponsorship/exhibitors. We use a project management app that can incorporate client input to identify a timeline/checklist of all elements and due dates that contribute to quality event planning and execution. Large events such as annual meetings/conferences require a full year's planning calendar.</p>
<p>SITE SELECTION</p>	<p>Live Events: Vetting cities, drafting the request for proposal which includes specifications, reviewing potential site locations within selected cities, reviewing, and aggressively negotiating contracts. Future year(s) planning is critical.</p> <p>Virtual Events: Many of the elements of planning an in-person, live conference still need to be accomplished for a virtual conference. Obviously, food & beverage, AV and the like are not relevant. Arden Solutions has the experience of supporting high-quality three-day conferences, two-day board meetings, and other one-day conversions from in-person to virtual with great success. The additional pieces that need to be added include the use of our Zoom licenses and possibly voting platform, development of FAQs, training sessions for identified constituencies such as leadership, speakers, participants on how the new formats will work, providing trouble phone numbers and back up staff to ensure success.</p>
<p>COMMITTEE COLLABORATION</p>	<p>Event goals, purpose, agenda timing, art/marketing approaches. Identifying continuing professional education credits desired. Calls for proposals. meeting rooms, audio visual, food and beverage. Marketing collaboration. Plan for effective collaboration and networking opportunities.</p>
<p>EXHIBITS / SPONSORSHIP</p>	<p>Work with leadership to identify sponsors and vendors; develop prospectus, circulate, register them, and manage exhibit hall. Contract with decorator, poster session poster provider, etc. Provide recognition posters, PowerPoints, website recognition, etc. Follow up with exhibitor/sponsor evaluation. Sign them up for the next event.</p>
<p>MARKETING</p>	<p>As previously mentioned, collaboration with leadership. Develop marketing plan for potential participants (members and non-members as permitted). Develop marketing materials and time-line marketing plan including distribution channels to include website, email, partners and listservs, social media, and perhaps printed materials.</p>
<p>LOGISTICS</p>	<p>Event website development and maintenance. Manage registration and check-in. Apply for continuing professional education credits. Logistics to include food & beverage, audiovisual orders, posters, exhibit hall, room sets, etc. Sourcing promotional products, speaker gifts and award plaques/crystals. Designing, ordering, and circulating agendas. Creating agenda App for tablet, phone & computer. Signage. Golf and offsite outings.</p>
<p>SPEAKERS</p>	<p>Once invited (if the association does the first approach) speakers' formal invitation and contracting/management. Collect information from speakers for marketing, agenda, PowerPoints, handouts, etc. Manage proceedings.</p>
<p>REGISTRATION</p>	<p>Set up attendee registration in the AMS, assign accounting codes if appropriate, edit automatic confirmation communications, accept registrations by credit card and check. Likewise set up, accounting, confirmations for sponsors and exhibitors. Print name badges.</p>

DAYS OF EVENT	Act as key contact with hotel and vendors. Registration desk/check-in and information, making sure all logistics ordered are properly provided: signage, room and AV sets, food & beverage, complete oversight of all aspects. On-site staff numbers are a minimum of two, with others assigned depending on the size and scope of the event.
POST CONFERENCE	Reviewing, approving correct invoices, and seeing that bills are paid, distributing, receiving, and summarizing evaluation surveys. Ensuring all registration fees are paid and all registrants are documented into the database. Detailed final report of income, expenses, registration, evaluation, suggestions for next time.