

ASMI Performance Policy Statement and Quality Assurance Program

Employee Quality

Association and Society Management International (ASMI) maintains a high threshold for employment qualifications within the company, resulting in experienced and quality staff, and boasting a wide range of expertise and knowledge – from conference/meetings management to strategic planning and visioning.

Competence and knowledge of staff is included in new client proposals and published on ASMI's web site. ASMI sustains a highly energized work environment by providing periodic career counseling and performance reviews. Staff evaluations incorporate findings of client satisfaction surveys.

Internal Quality Assurance Parameters

Responsiveness - ASMI policy requires employees to respond to all calls and written inquiries within 48 working hours. Incoming mail is date stamped and a "reading file" tracks exchanges. ASMI account executives monitor all client program delivery ensuring service speed and accuracy.

Communications – documents are spell-checked and proofread prior to release. ASMI staff are required to be responsive via e-mail, telephone and written correspondence, and must regularly check voicemail when out of the office. Key client leadership are provided direct-dial and cell-phone numbers of account executives.

Productivity – work teams are supervised as appropriate to ensure that client programs are advanced effectively and efficiently.

Performance Service System

ASMI conducts regular staff meetings to review productivity, communications and responsiveness. Tools such as a master calendar of programs and activities, a centralized task list, and time records are used to track work progress and client service.

ASMI provides the following procedures for "Financial Reporting," "Client Satisfaction Survey" and "Performance Review with ASMI Principals" to ensure continuous, quality service:

Financial Reporting

The Board receives regular updates, and ASMI distributes the finance statements and special projects statements at the direction of the association treasurer.

A periodic audit, compilation, review or other type of systems documentation is arranged at clients' expense to ensure that year-end financial statements prepared for the client by ASMI present fairly, in all material respects, the financial position and changes in net

assets, and that cash flows at year-end are in conformity with generally accepted accounting principles (GAAP). Should an association receive more than \$350,000 in federal funding within one fiscal year, an audit is conducted to ensure that operations are in accordance with federal OMB A-133 audit standards.

Client Satisfaction Survey

ASMI conducts, with input and approval from client leadership, a management services satisfaction survey of the Board of Directors on an annual basis. The survey includes the key service categories outlined in the management agreement. Sample measurements of satisfaction (i.e. responsiveness, timeliness and quality) are: Central Office Facilities; Membership Services (materials and processes); Member Communications (listserv, newsletter and e-mails); Web/Database Service (maintenance and updates); Financial Management (timeliness of expense reimbursements, general ledger maintenance, demonstration of adequate internal controls, etc.); Grants and Contracts Management; Meetings and Conferences (staff support); and Committee Support.

The survey is accomplished after six months of service for new clients, and annually thereafter. It should occur six months prior to management agreement renewal and is an ASMI method to identify performance improvement areas.

Performance Review with ASMI Principals

ASMI schedules at least annually a conference call between ASMI principals and officers to discuss service satisfaction, current activities, staff performance, and other key areas. ASMI can also schedule (based on client leadership availability) annual face-to-face meetings between ASMI principals and leadership to discuss current and future activities, overall staff performance, and other key areas.

ASMI also recommends that the association's president and executive director regularly participate in a chief staff executive-chief elected official symposium to help establish the leadership approach and focus on strategic planning and visioning.

Client Contract Review and Amendment Procedures

The management agreement is included in Board manuals or otherwise provided to the current leadership of each client. ASMI ensures contractual services are provided, and clients are encouraged to request additional services outside the scope of work, at additional cost. Each client reviews the management contract and addendums on a regular basis, at least as often as the contract is extended. The account executive informs the client service team in face-to-face meetings of updates to the scope of service.