



All Change — An Association Leaps into the 21st Century

HOW ONE ASSOCIATION REVOLUTIONIZED THEIR OPERATIONS TO FOCUS ON CHARTING THEIR FUTURE

The Transition

AAPC, the American Association of Pastoral Counselors, first came to RMK Productions simply looking to outsource the management of their day-to-day finances. Founded several decades ago, the association's focus had been training and certification. However, much of that role had been usurped by State regulation and insurers' requirements over the years. AAPC was in the process of downsizing as it worked to reinvent itself and thought outsourcing financial services would leave remaining staff free to focus on serving the membership.

Within 30 days of starting the financial services work, AAPC made the decision that it was in the association's best interest to ask RMK to take over all

association operations. A key driver for this request was the need to review and update all systems and processes. Like many organizations AAPC's investments in technology had not been aggressive enough and it was clear a big leap forward needed to be executed quickly.

"The Board knew that AAPC was not operating efficiently, but we aren't business people, we're counselors," said Dr. Randy J. Simmonds, Immediate Past President, AAPC and Executive Director, Samaritan Counseling Center of the Rockies. "RMK came to us with smart solutions for our specific challenges. Their ability to quickly and successfully execute those ideas helped me sleep better."



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The Rebuild

During the first ten months of working with AAPC, RMK reviewed, reinvented and upgraded the association's operational processes and IT systems, including:

1. Rebuilt the **entire financial reporting structure**, streamlining documentation, building clarity and reducing opportunities for error
2. Implemented an **online reimbursement system** replacing the manual process Regional offices and volunteers had been using, reducing reimbursements from 45+ days to 21 days or less and creating an electronic, rather than paper-based, audit trail
3. Transitioned to a **rolling 12-month membership** from a set annual renewal date
4. Transitioned **membership renewals** from a paper-based, USPS mailed invoicing process to a contemporary online, self-service renewal system increasing membership database accuracy and delivering significant cost savings
5. Transitioned the associations **accounting system from accrual to cash**, further simplifying reporting, especially as it related to implementation of the rolling 12-month membership
6. Conducted an **insurance audit** reducing and eliminating some coverage while adding and expanding other coverage resulting in significant savings, better protection and improved customer service
7. Moved the **phone and voicemail** system to a soft phone service that enables AAPC's eight Regions to each have their own voicemail with messages emailed to volunteers for response
8. Moved the association **membership database** to a new, association management system
9. Launched a **new website** on a new system
10. Built and delivered customized **training** on new systems and processes to Regional leadership
11. Implemented a short-term **customer service triage** system to ensure high-quality, timely membership support to facilitate the changes



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AAPC Today

AAPC's all-volunteer Board of Directors worked closely with RMK during the first several months of the transition. With the organization's operations gaining stability, AAPC's Leadership has been able to turn its focus to reinventing the associations future.

"I still distinctly recall the executive committee meeting when RMK reported that all operations were running smoothly," said Tere T. Canzoneri, M.Div, LSCW, AAPC President and Pastoral Counselor, St. Bartholomew's Episcopal Church. "I felt a great sense of relief as well as a rush of energy that we could now really get down to the work of charting AAPC's future."

As volunteer leaders work to build a vision and structure for the future, RMK is preparing AAPC to be ready for whatever that future holds. Options range from continuing operations with a significantly expanded focus on professional education to merging with a like organization.

To ensure a smooth future, RMK has built the AAPC Operations Vault™. The Vault, together with a separately encrypted list of account log in details, ensures that both current operations and any future transitions will proceed seamlessly.

Change Guidance

Change is hard for volunteer leaders and for members. But without change organizations stagnate. Whether your organization is looking for new ideas or just a better way forward, you need an association management partner that can gently push and hold your hand at the same time.

