



American Thyroid Association

Organizational Structure & Governance

Managing the Association

Public Relations

Programs and Services

Association Organizational Structure

- ❑ An association is a group of people or companies collaborating to achieve common goals. Non-profits serve the common good.
 - ❑ Articles of Incorporation
 - ATA Tax exempt status: 501 (c) 3 Non-profit based on our Educational purpose
 - ATA was incorporated in New York in 1959 and has business operations in the commonwealth of Virginia as a 'foreign' corporation
 - New York and Virginia State annual reports must be filed to remain in good standing
 - ❑ Board structure
 - ❑ The ATA has 14 voting members: 6 officers and 8 or more directors.
 - ❑ The Executive Committee is comprised of officers and executive director.
 - ❑ Directors serve a term of 4 years.
 - ❑ New directors and a president-elect are elected every year.
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Association Governance

- ❑ Bylaws
 - ❑ Statement of purpose
 - ❑ Forms, types, qualification of membership
 - ❑ Dues structure (not amount)
 - ❑ Lists elected officers (including terms, powers, duties and rules for filling vacancies)
 - ❑ Role of the Chief Executive Officer (Executive Director)
 - ❑ Voting qualification including procedures
 - ❑ General assembly and special meeting criteria
 - ❑ Descriptions of standing committees
 - ❑ Accounting, fiscal and reporting procedures
 - ❑ Procedures for amending bylaws and dissolution
- ❑ Policies and Procedures
 - ❑ Rules of the organization -- more specific than bylaws.
- ❑ Committees
 - ❑ Set up to implement actions necessary to accomplish goals of the organization as described in the strategic plan
- ❑ Elections
 - ❑ Defined in the ATA Bylaws: what offices are elected and by whom.
 - ❑ Only ATA Active members vote; Senior, Corresponding, Associate and Emeritus are non-voting.

ATA Strategic Planning

- ❑ Mission: The ATA leads in promoting thyroid health and understanding thyroid biology.
 - ❑ A clear and succinct representation of the organization's purpose for existence.
 - ❑ Incorporates socially meaningful and measurable criteria.
- ❑ Vision: The ATA is the leading organization focused on thyroid biology and the prevention and treatment of thyroid disorders through excellence and innovation in research, clinical care, education, and public health.
 - ❑ A guiding image of success formed in terms of a contribution to society.
 - ❑ Should be realistic and credible, well articulated and easily understood, appropriate, ambitious and responsive to change.
- ❑ Values: The ATA values scientific inquiry, clinical excellence, public service, education, collaboration, and collegiality.
- ❑ Goals: See <http://www.thyroid.org/about/whoweare.html#goals>
 - ❑ Clearly specifies the accomplishments to be achieved if the vision is to become real.
- ❑ Objectives
 - ❑ Clearly states specific activities required to achieve the goals, starting from the current status.
- ❑ Actions: See http://www.thyroid.org/services/council_mtg/resources/plan05.php
 - ❑ Action plans specify the actions needed to address each of the top organizational issues in order to reach associated goals and includes who will complete each action and according to what timeline
- ❑ Strategic Alliances: a formal relationship formed between two or more associations to pursue a set of agreed upon goals or to meet a critical need while remaining independent organizations

Volunteer Roles

- ❑ Role of an association volunteer
 - ❑ The Board has fiduciary/owner responsibility for the association
 - ❑ Members pay dues, receive publications and communications, participate in committees, vote and attend business and scientific meetings
 - ❑ Policy makers, write guidelines, influence the specialty or field through the Board.
- ❑ Leadership and volunteer management
 - ❑ Officers
 - ❑ Board members
 - ❑ Committee chair/member
- ❑ Staff relationship to volunteers
 - ❑ Executive Director responsible to Board and serves as intermediary between staff and board
 - ❑ Staff liaison to Committees described in policies and procedures
 - ❑ Policy maker– support their decision
 - ❑ Board – Respect and deference
 - ❑ Member – Assist with their inquiries and requests for information
- ❑ Protocol and diplomacy
 - ❑ Staff serves the membership. The members “own” the association.

Staff Roles

- ❑ Staff Roles
 - ❑ ED to Board
 - ❑ Sole employee of the Board
 - ❑ Function as the liaison between the Board and the staff
 - ❑ Directs the implementation of Board policy
 - ❑ Staff to ED
 - ❑ Hired, fired and directed by the Executive Director
 - ❑ Implement actions designed to carry out policy as set by the Board and under the direction of the Executive Director
 - ❑ Staff to Board and Committee Chairs
 - ❑ Staff interacts with Board as needed for implementation of program responsibilities
 - ❑ Staff reports to Executive Director regarding any personnel or ethical issues
 - ❑ Staff goes directly to Executive Director for grievance issues
 - ❑ Staff familiarizes with policies and procedures for whistle blower process
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Managing the Association: Budget and Finance

- ❑ Budget is the organization's strategic plan in financial terms
 - ❑ In operational terms, the budget is the best estimate of future programs and services
 - ❑ Associations are managers of funds provided by others
 - ❑ It is incumbent upon the organization, both leadership and staff, to have the proper controls to protect these funds.
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Managing the Association: Human Resource Management

- ❑ Success is primarily determined by how well members' needs and interests are met.
 - ❑ Employees are an association's most important resource
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Managing the Association:

Legal issues

- ❑ Corporate Status
 - Articles of Incorporation
 - Bylaws
 - ❑ Finance and Audit
 - ❑ Tax
 - IRS Form 990
 - Failure to conduct business in accordance with the tax-exempt purpose of the organization as described by the IRS code
 - Unrelated Business Income Tax (UBIT)
 - ❑ Litigation
 - ❑ Contracts
 - Legal counsel review
 - Always open to negotiation
 - Executive Review and sign
 - Specific termination clause
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Managing the Association: Legal Issues

❑ Anti Trust

- Sherman Act and other antitrust laws prohibit anticompetitive acts in restraint of trade
 - Price fixing
 - Allocation of markets
 - Boycotting

❑ Insurance

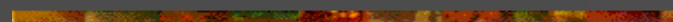
- Commercial General Liability – protects against basic theft, slip and fall and other activities that can occur on the associations property
 - Association Professional Liability Insurance - Protects against liability that may arise from association programs
 - Directors and Officers insurance – protects volunteers and staff against liability for actions taken on behalf of the organization
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Managing the Association: Primary Consultants and Vendors

- Auditor
 - CME Provider/Co-sponsor
 - Abstract Submission – Internet vendor
 - Media Consultant - Medical Writer for Press Releases
 - Graphic Designers: Clinical Thyroidology, SIGNAL, Annual Meeting Program Book, Ads, Web brochures, Exhibitor prospectus, Meeting logos
 - Web content updates, Web formatting, FATA enews, Member enews
 - Accountant and bookkeeper
 - Thyroid Guidelines Editorial manager
 - Website development and streaming video host and data designer
 - Information Technology (IT) hardware and network functions, firewall, virus protection, back up
 - Database software developer and host, online and back of the house.
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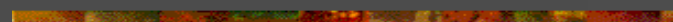
Managing the Association: Public Relations



- ❑ A management function
 - ❑ May be integrated with advertising, sales promotion, direct marketing, membership other types of communication.
 - ❑ Public Relations Strategic Communications Plan
 - Key messages of the association
 - Target audiences
 - Vehicles for message delivery
 - Communication strategies
 - Evaluation mechanisms: Did the message reach its key audience? Did it achieve its desired outcome?
 - ❑ Conducting a PR Campaign
 - State the objective
 - Analyze the situation (internal and external factors)
 - Define the program goal
 - Identify target audiences
 - Define the program objective for each audience
 - Determine communication strategies (message and media)
 - Implement the program (assign responsibilities, determine budget, develop schedule)
 - Evaluate results
 - Modify program if necessary
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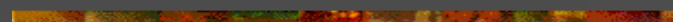
Managing the Association: Fundraising



- ❑ Funding for associations tends to come from volunteer leadership, membership and companies that provide products and services to membership. It can also come from publics who have an interest in the profession or trade.
 - ❑ Contributions to the American Thyroid Association support the primary mission objectives of the society: professional and patient education, thyroid research, guidelines for the treatment of thyroid disease and thyroid cancer.
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Managing the Association: Fundraising



- ❑ Contributions to the ATA come from members, patients, individuals who wish to memorialize or honor friends, family and their physicians. In 2006, the ATA was bequeathed a house from a grateful patient.
 - ❑ The ATA receives donations through the Health and Medical Research Charities, the United Way, the Combined Federal Campaign and is registered as a charitable organization in ten states.
 - ❑ The ATA has received unrestricted educational grant and in-kind support from Abbott Laboratories, Bristol Myers-Squibb, Genzyme Corporation, AstraZeneca, Onyx Pharmaceuticals, King, OXiGENE, Exelixis, Bayer HealthCare Pharmaceuticals, KV Pharmaceuticals. In-kind support comes from the following ultrasound manufacturers: GE Healthcare, Medison America, Mindray Ultrasound, Ultrasonix Medical Corporation, Toshiba Ultrasound, Sonosite, SmartSound, Shimadzu, and Siemens.
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Programs and Services:

Member Services, Recruitment & Retention

- ❑ Membership has a dramatic impact on the financial status of your organization.
 - ❑ Membership growth is about the momentum of the organization
 - ❑ Membership recruitment and retention needs to be systematic, well-planned and efficiently managed if the organization is going to be successful.
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Programs and Services: Education Program

- ❑ Continuing Medical Education (CME)
 - CME hours, as required by the licensure board, is a strong motivator for participating in an educational program
 - ❑ Needs assessment.
 - ❑ Program Design and Development
 - ❑ Budgeting
 - ❑ Implementation and Management
 - Staff support the content, abstract submission and program publication process, budget, CME partnership, negotiate and oversee contracts with exhibition company, hotel, insurance, registration, audio-visual, equipment, temporary help, space, food and beverage as well as all on-site logistics.
 - Staff in charge must be detail oriented, adaptable, and have physical and mental stamina to deal with last minute changes and solve last minute issues that may arise.
 - ❑ Evaluation and Review – identifies, collects, interprets and provides information for the purpose of judging the effectiveness and future of the program. Key constituencies, program committee, attendees and staff.
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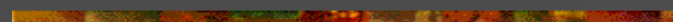
Programs and Services: Publishing

- ❑ Unrelated Business Income Tax (UBIT)
 - Activities that are unrelated to the association's mission or purpose
 - If revenue from an unrelated business rise to within 30 – 40 percent of the associations annual budget, the IRS may question its tax –exempt status

 - ❑ To avoid UBIT, structure activities in a manner such that they will not be subject to taxes.
 - Affinity programs that result in a royalty to the organization are generally not subject to UBIT.
 - Sponsorship activities can generate tax-free revenue if the association recognizes and acknowledges the sponsor in accordance with IRS guidelines.
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Programs and Services: Certification & Accreditation



- ❑ Certification –The measurement of competency of individuals. Certification programs often increase the demand for new and targeted education programs to prepare for certification programs.
 - ❑ Accreditation – Process of standards setting and compliance measurement for organizations or institutions
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Primary Resource:

Professional Practices in Association Management
Executive Editor
John B Cox, CAE