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Subject: Recap of Communications on MGMA State Strategy
Date: Tuesday, October 17, 2023 4:27:55 PM
Attachments: [1-June 26 2023 State Strategy email.pdf](#)
[2-MGMA State Strategy FAQ 2023 July21.pdf](#)
[3-STATE STRATEGY PRESENTATION FOR JULY TOWN HALL final.pdf](#)
[4-2024 MGMA Partner Affiliate Agreement 4884-8397-8091 DRAFT.pdf](#)
[5-MGMA StateStrategy FAQs 2023 vAug25.pdf](#)
[6-MGMA Response Letter.pdf](#)
[7-YELLOW GREEN EMAILS IMPORTANT MGMA State Notice of Non-Renewal & New 2024 Agreement.pdf](#)
[8 - RED EMAILS MGMA State Notice of Non-Renewal New 2024 Agreement.pdf](#)
[9-2024 MGMA Partner Affiliate Agreement - Final.pdf](#)
[10-MGMA StateStrategy FAQs 2023 v3 Oct16.pdf](#)
[11-MGMA State Strategy Town Hall - Dual Membership with Data 09-19-2023.pdf](#)

Dear State MGMA Leaders:

We're looking forward to seeing our state leaders this weekend who are joining us for the State Leaders Conference (SLC) and the MGMA Leaders Conference. We wanted to make sure we will all be on a level playing field going into SLC by ensuring that all state leaders have received, and have had an opportunity to review, the communications that have been previously distributed related to the MGMA state strategy and new Partner Affiliate Agreements. We recognize that it was critical to have a robust and transparent communication plan associated with these changes regarding the "why" behind the strategy, what the transition process entails and the implementation timeline. This communication strategy included the following communication pieces distributed to date:

Communication Recap

Date	Communication
June 26, 2023	State Communication Email: Communication distributed to all state affiliates informing them of the new state strategy. This also included information regarding upcoming digital Town Hall events and a Partner Affiliate vs. Chapter checklist outlining the component changes.
June 27-July 20, 2023	Calls with states to review KPI Benchmarking Reports
July 18, 2023	Digital Town Hall meeting with state leaders and staff focused on State Strategy including the Partner Affiliate and chapter models
July 28, 2023	State Strategy FAQ document, State Strategy Town Hall presentation and Draft of new Partner Affiliate Agreement distributed to state leaders
August 15, 2023	Digital Town Hall meeting with state leaders and staff focused on Regional Conference strategy
August 28, 2023	Updated FAQ document distributed to state leaders and staff
September 19, 2023	Digital Town Hall meeting with state leaders and staff focused on Dual Membership strategy
September 25, 2023	MGMA-ACMPE Response to State Notice of Dissent
September 27, 2023	MGMA State Notice of Non-Renewal and final 2024 Partner Affiliate Agreement mailed to all state presidents via USPS Priority Express Mail
September 28-29, 2023	MGMA State Notice of Non-Renewal and final 2024 Partner Affiliate Agreement emailed to all state presidents
October 17, 2023	Updated FAQ document and Town Hall presentation on dual membership distributed to state leaders and staff (see attached)

In addition to the communications listed above, there have been many calls and email communications with individual state leaders and staff addressing specific questions and concerns.

In general, the greatest areas of concern have centered around the following areas:

a. Key Performance Indicators (KPIs) and corresponding performance benchmarks:

In 2022, MGMA communicated that questions would be added to the upcoming State Matrix focusing on key performance indicators and benchmarks for associations. The KPIs focused on the key areas of viability for associations – financial sustainability, membership growth and retention and member engagement/benefits. The KPI benchmarks were obtained from nationally recognized sources including [American Society of Association Executive \(ASAE\)](#) for financial sustainability metrics and the 2022 [Marketing General Benchmarking Report](#) for membership retention. It is important to note that national MGMA measures its performance and is held accountable to these same metrics and additional KPIs internally and with our Board of Directors.

b. Non-renewal of the current Affiliate and Partner Affiliate Agreements and implementation of a new Partner Affiliate Agreement effective January 1, 2024: There are two changes to the Partner Affiliate Agreement that impact state MGMA members:

- i. All states will offer Dual Membership product options in addition to state-only membership products.
 1. The reasoning is to provide consistency in membership product offerings across all MGMA state associations. The Dual Individual Membership product is currently being offered in nineteen (19) states and has resulted in over 1,100 new member purchases.
 2. The new agreements also include the addition of a new Dual Organizational Membership product which has been repeatedly requested by our state partners. This is the greatest membership growth product at the national level with over 950 organizations participating. MGMA will be introducing the Dual Organizational membership product during the national new sales and renewal process as an upsell opportunity to the national product. We are already receiving inquiries from organizations interested in the dual product offering.
- ii. All states affiliates will be given the option of participating in a new regional spring conference strategy. MGMA currently holds two spring conferences focused on specific topics (Finance, Operations). The regional conference strategy will create the opportunity for our state associations to participate in these conferences with state/regional content and networking opportunities. MGMA will bear all of the financial expense and states will share in both registration and exhibitor/sponsor revenue. Conference registration will also include new state membership for participating states with corresponding dues revenue.

As always, the new Partner Affiliate Agreements will be effective for one year with

the opportunity for renewal/non-renewal notice ninety (90) days prior to the annual renewal date.

- c. Implementation timeline: We have seen several of our state associations dissolve over the past few years and it is crucial to try new and innovative approaches to drive sustainability and provide value to members. We recognize the value of state and national memberships for our members and industry and want to continue to partner in the future. The substantive change to the Partner Affiliate Agreement is dual membership which is designed (and proven) to drive membership growth at both the national and state levels. Membership growth also drives downstream revenue through the opportunity to increase conference attendance, exhibitor and sponsor revenue, and volunteerism.

MGMA has worked across the enterprise to build a strategy that would create better alignment with our MGMA state affiliates and provide a model that will drive greater collaboration, support and value to members at both the National and State levels. We reaffirm MGMA's commitment to our state associations, their sustainability and communicate our intent to be the most valued and important partner to our states.

As always, if you have any questions, please reach out to me directly.

Best,
Tracy

Sent on behalf of:

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