APC/ACPE Merger Timeline

2016-2022
• The Strategic Partners Group Leadership meetings began which included the executive directors and presidents.
• During these meetings, the partners decided to do a Joint Leadership Symposium in 2019 and host a Joint Conference in 2020.

2016

• A three-year strategic plan was developed to engage the strategic partners’ boards and members.
• The plan included exploring the feasibility of a joint ethics process with all the strategic partners, a joint advocacy program and the 2020 Joint Conference.

2017

• In May, the Strategic Partners met for a day at the APC office to discuss how to deepen their partnerships together.
• In June, a Memorandum of Understanding was developed by the six Strategic Partners.
• The purpose of the MOU was to explore types of partnership that would create a structure that would allow the strategic partners to work as a unified entity and voice for advocacy, marketing, certification, and ethics.
AAPC was consolidated with ACPE, and its members joined ACPE.

In March, a face-to-face meeting was held in Miami, Florida to discuss a new structure for the strategic partners. CASC/ACSS informed the strategic partners that they could not fully participate in becoming one entity with the strategic partners due to prior commitments.

At this meeting, ACPE, APC, NACC, and NAJC decided to proceed toward becoming an entity.

In October, La Piana selected and contracted by strategic partners as consultants for the ongoing conversations.

On November 20-21, the Strategic Partners met in Cleveland, Ohio to continue to explore ideas to formalize the partnership. La Piana Consulting, attended the meeting to guide the strategic partners in determining the best form of structure.

On January 31, NACC and NAJC decide to remain separate entities and join as networks to the central entity.

In February, a meeting was held in Dallas, Texas to further discuss the central entity, governance, and structure.

The Joint 2020 Conference in May was cancelled because of the COVID19 pandemic.

The merger discussion was paused in March through June to allow the strategic partners to cancel the Joint 2020 Conference and support their memberships during the outbreak of the pandemic.

In June, the partners decided to focus on the central entity first and finalize networks later.

The ACPE and APC executive committees became the representatives of their organizations for the new central entity discussions.
• In January, the financial due diligence, merger terms, merger FAQs, post-merger integration plan, and sample integration plan were presented to ACPE and APC Boards.
• On February 26, ACPE and APC boards hosted a joint meeting to build a connection and discuss the process of merging into a new association.
• March 18, ACPE and APC boards met separately and voted to approve the merger.
• March 25, APC and ACPE start legal due diligence.
• APC and ACPE hold two Town Hall meeting with their individual memberships.
• APC and ACPE continue to meet to develop governance model.
• June 28, APC and ACPE will hold a joint Town Hall meeting for its membership.
• In July 6-26, ACPE and APC members will vote to commit to a merger.
• July 27, APC and ACPE announce results of merger vote.

If the 2021 merger vote is yes:
• APC and ACPE retain a lawyer to advise on legal issues and oversee the legal process to merge APC and ACPE.
• Appoint an Implementation Team. Decide individuals of the new board for the new association.
• Plan for and begin a search for the executive director/CEO for the new association.
• Create and revise over time a budget for implementation and integration for the new association.
• August and ongoing, select name of new association, location of national office, clarify mission/vision and goals/objectives of new association; complete governance and operational structures.
• Decide which current employees can best fit the management team.
• Decide what staffing changes need to be made in order to integrate the new organization.
• On or before January 1, 2022, executive director/CEO is hired for the new association.
• Legal Counsel prepares final filings related to closing merged associations.
• New organizational structure and executive team is in place. New bylaws and articles of incorporation go to members for approval.
• April 1, projected merger date, association begins to operate according to new bylaws.
• May-June, prepare an audit to close out the merging organizations previous fiscal years.

Questions?